



MONASH University

WORKGROUP COLLABORATION ROLLOUT

PROJECT CHARTER


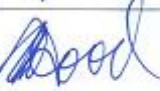

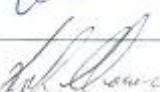


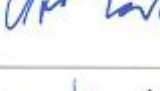

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In signing this paper I confirm I have read through the document contents and agree with the information detailed in all pages.

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Approver (name, title)	Jeremy Du Ve Director – Director Applications Services	Signature		Date	29/7/08

Any subsequent changes to the scope of this document are subject to change control and appropriate sign off.

Change Record

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03/07/07	Daryl Wood	.9903	Continued populating document
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04/07/07	Daryl Wood	.9905	Change format to make document more reader friendly Updated Roles and Responsibilities
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20/07/07	Daryl Wood	.9909	Incorporated Leon Troeth's feedback
26/07/07	Daryl Wood	.9910	Incorporated further feedback from Ian Hall
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23/08/07	Daryl Wood	2.1	Updated approver list Updated Dates for Project
27/08/07	Daryl Wood	2.2	Updated with feedback from Alan McMeekin and Jack Chorowicz Updated Appendix C with the latest updates from document WCR levels of readiness_v0.9905 Updated with feedback from Helen Palmer
05/12/07	Daryl Wood	3.0	Updated Charter with new Timeframes Included Lotus Notes 8.0 Included Lotus Notes 8.01 Included Lotus Traveller Updated Risks Updated Issues Included Jeremy Du Ve as a signatory as per Change 001 Updated Section 3.2 as per Change 001
16/01/08	Daryl Wood	3.01	Adjusted schedule
02/06/2008	Raymond Lau	3.2	Updated Background, Scope, Out Of Scope, Assumptions, Constraints, Project Approach to Training, Fast Tracking Implementation, Timetable and Key Deliverables Managing Risk and Change, Project Organisation chart & Project Schedule
30/06/2008	Raymond Lau	3.2.01	Feedback from Jack/Daryl. Project Schedule update

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Introduction

Purpose

This document has been created to define how the **Workgroup Collaboration Rollout (WCR) Project** is to be executed, monitored and controlled. The WCR Project comprises two components, Technical Infrastructure and Business Change. This document addresses the former.

This document is an agreement between the WCR Project Manager, the Project Sponsor, Program Director, Steering Committee and key Stakeholders from Monash University providing resourcing to the Project.

The Project Charter serves as major communications tool for all Project Stakeholders and participants.

All project participants agree on the processes described in this document and adherence is required for the smooth running of the project

This Project Charter is itself is a managed document and will be controlled as per the defined Monash Project processes and procedures located at <http://www.its.monash.edu/staff/projects/project-management/>

This document is positioned in Phase 1: Project Planning of the Monash Project Management Methodology.

Audience

The intended audience for this document is:

Project Sponsor(s)

- Alan McMeekin – Executive Sponsor
- Jack Chorowicz – Project Sponsor

Steering Committee

- Jack Chorowicz
- Ian Hall
- Byron Kirby
- Alan McMeekin
- Margo Hellyer

- Phil Steele
- Steven Scroggie
- David Murphy
- Janet White
- Howard Jacobs
- Jeremy Du Ve
- Neil Clarke

Project team members

- Leon Troeth – Manager – Identity and Messaging Service
 - Rob Norris
 - Lawrie Hanson
 - Daniel Hyde
 - Samuel Gundry
 - Rina Nejar
 - Michael Gunzel
 - Yin Pin Yeong
 - Nat Hartage
 - Dan Norris
 - Mei-Li Quah
- Steve White – Manager Production Facilities
 - Cyrus Khaver
 - King Hii
 - Peter Hayes
- Alfred Tan –Manager, Shared Systems
 - Katherine Ching
 - Katherine Lim
 - Tony Cataldo

- Tony Payne
- Ben Couldry
- George Scott
- Tom Maher – Network Manager
 - Kheeran Dharmawardena
 - Steve Mitchell
- Christian Wilson – Security Manager
 - Brad Ellis
 - Steve Oxley
- Daryl Wood – ICE Programme Manager
- Raymond Lau – Project Manager
- Elizabeth Martin – ICE Change Manager
 - Joanne Mihelcic
 - Desiree Joubert
 - Julie Spencer
 - Hong Ngov
- Peter Vilo – IBM Account Representative
- Joe Invaso – IBM Project Manager
- Emily Feher
- Lisa Marsh
- Stephen Edmonds

1.1 Related documents

ICE Change Program Overview Version 1.0 – Helen Palmer – 14th November, 2006

ICE Program Roadmap Version 1.2 – Sarah Kittmer – 3rd January, 2007

WCR Project – Server Options Rel 8.0 - v1.0-1

2 Executive Summary

2.1 Overview

Monash University's Vision for 2025 is:

“Monash University has the following as its statement of purpose:

Monash University seeks to improve the human condition by advancing knowledge and fostering creativity. It does so through research and education and a commitment to social justice, human rights and a sustainable environment. (Monash Directions 2025, p. 2)

The Information Management Strategy takes this statement and focuses on supporting the advancement of knowledge through research and transmitting that knowledge through education. The resulting vision for information management at Monash University is therefore:

Managing information to better create and share knowledge”¹

The Information Technical Services (ITS) division has commenced a set of “collaboration projects” which form part of the Integrated Collaboration Environment (herein known as “ICE”) will underpin the overall arching strategy. These projects will investigate and replace existing workgroup and collaboration infrastructure where possible.

A Project was initiated in 2005 by ITS to commence the process of the University looking for a replacement to its workgroup and collaboration environment. The current environment had initially been deployed in 1997 after an extensive review of the commercial offerings available at the time. The solution most suited to the University's requirements was the Netscape suite which consisted of Email, Calendar, Monash Directory Service, and Collabra (discussion groups) products. Thunderbird Mozilla eventually took over the Netscape Email leaving Netscape Calendar still being used. Netscape and Thunderbird products are subsequently deployed and used extensively throughout Monash.

For a number of years now, the Netscape Calendar environment has not had vendor support by its supplier, SUN Microsystems. This poses a significant risk to the University as Calendar is widely used throughout Monash. The move to a supported Calendar product is essential to address this risk.

Some of the key issues required to be addressed in the Project were identified in the consultation undertaken with staff. The key issues that were identified are as follows:

- *The University is exposed to the risk of an extended calendar outage because its existing calendar solution is not supported by the vendor. A supported calendar solution is required to resolve this problem.*²

¹ <http://www.monash.edu.au/staff/information-management/strategy/summary.html>

² Key Business Issues Document (November 2005)

- *Use of Personal Digital Assistants (PDA's) and other mobile computing devices has been made more complex due to the limited availability of current synchronisation software from the vendor. The number of devices that are supported is also limited (e.g. No synchronisation available for mobile phones and latest model Palm devices).*
- *The email service is currently being used as a way of transferring documents between collaborating parties. This is due to its ease of use, however, the email service was not designed to be a document sharing mechanism. This has resulted in staff using a large amount of email quota or having to spend excessive time managing email quotas.*
- *Managing mailing lists is cumbersome using existing applications.*
- *Existing collaboration tools do not provide presence detection and do not make use of instant messaging technology commonly used by staff and students.*
- *Some staff spend a lot of time travelling between campuses for meetings. Many staff indicated that this could be resolved through the use of desktop or other video conferencing.*
- *It is not possible to share calendar information with people who are not registered on the calendar service.*

In response to these key issues Monash University during the Evaluation stage of the Project went to market via a Request for Proposal (RFP). The following vendors were then chosen to present to the Project Team

- IBM
- Microsoft
- Novell
- Oracle
- Sun Microsystems

Through extensive discussions and business and technical evaluations the IBM offering of IBM Lotus Domino Messenger Server with Notes, IBM Lotus Quickr, IBM Lotus Sametime and IBM Lotus Notes Traveler ³ was considered to be the most appropriate solution for Monash. Throughout this document, the term “IBM Workgroup Collaboration Technology” will refer to the offerings provided by IBM.

The WCR Project will implement the IBM solution in Monash University to address the above issues.

³ IBM Traveler replaces Websphere Everyplace Access & Everyplace Connection Manager
<http://www-01.ibm.com/common/ssi/cgi-bin/ssialias?subtype=ca&infotype=an&appid=iSource&supplier=897&letternum=ENUS907-128>

3 Project Objective and Scope

3.1 Objectives

3.1.1 Strategic Objective

The strategic objective of this Project is to:

- Deliver a standard workgroup and collaboration environment across the University to all Faculties and Supporting Business areas
- Deliver an Infrastructure capable of supporting the IBM Workgroup Collaboration Technology to Monash University

3.1.2 Project Objective

The primary objective of the Project is to:

- Deliver this project urgently to mitigate inherent support risks associated with Netscape Calendar.
- Provide Disaster Recovery capability.
- Deploy IBM Workgroup Collaboration Technology to the estimated 16,000 in Australian, South Africa and Malaysia Desktop machines
- Establish support processes.
- Provide a mechanism for facilitating end user learning for existing work replacement functionality.
- Deploy the Project as quickly as possible, whilst maintaining a balance of quality

3.1.3 Dependencies

The WCR Project is considered a high priority and as a result there has been a request made by the Information Technology Services Division Executive Director, Alan McMeekin to ensure that the Project starts rolling out the Lotus Notes client by early October. It was also requested that ITS be the “pilot” group for Lotus Notes Version 8.0 and that the pilot group be able to commence trialling in December 2007.

The project is dependent upon external Vendors such as IBM, IBM Business Partners and the like to provide specialized resources for specific problems that the project has encountered. The Vendors can also provide their experience and guidance to assist Monash in the development and deployment of the IBM Workgroup Collaboration Technology.

For the Project to meet the go-live date there are a few items that the Project will be dependant upon from external Vendors.

They are:

From IBM

- A production version of Windows Lotus Notes Client 8.0.1 which is available to Monash University from IBM by end of January 2008.
- A production version of Macintosh Lotus Notes Client 8.5 which is available to Monash University from IBM by end of December 2008.
- A production version of Linux Lotus Notes Client 8.0.1 which is available to Monash University from IBM by end of February 2008.
- A production version of Windows EasySync 4.2.5 which is available to Monash University from IBM by end of March 2008.
- A production version of Windows, Macintosh, Linux Sametime which is available to Monash University from IBM by end of May 2008.
- A production version of Windows, Macintosh, Linux Quickr which is available to Monash University from IBM by end of February 2008.
- That Domino Server 8.0.1 is backward compatible with the previous versions and patches of Domino's Server and all Lotus Notes currently deployed in Monash.
- That the production release of Lotus Notes Traveller co-exists and functions with Domino 8.0.1
- Technical Resource Assistance for developing the migration process
- Technical Resource Assistance in the support for our implementation and rollout
- Monash University has the option at its discretion to sign a Premium Support Programme Agreement with IBM to ensure that Monash gets the appropriate support throughout the Project. This agreement is reviewed every three months to ensure Monash is getting "value for money".

From other Vendors

- Developed applications to assist in
 - local folder migration
 - address book migration

3.2 Scope

3.2.1 Background

The contract between Monash University and IBM Australia Pty Ltd was signed on 26th September 2006. In summary this agreement provided Monash University with access to the IBM Workgroup Collaboration Software.

From September 2006 the Workgroup Collaboration Project Team invited IBM to conduct a proof of concept and also developed and tested the Domino's 7 server and Lotus Notes client infrastructure. After this time technical problems have arisen and different versions have been released by IBM.

Since beginning the pilot on 15th October, 2007, there were 3 major issues that contributed to the instability of the environment. These are detailed in the ICE Issue and Risk Register as issues:

- Issue #119 - Clusters crashing,
- Issue #120 - Server Crashing – Java and
- Issue #122 - Server Crashing - DWA Help

IBM was then engaged to provide the University with a document detailing the health of the Lotus Notes / Domino environment. In the document, by Michael Lucchese dated 21st November, 2007, the key recommendation was to upgrade to version 8.0. IBM had previously confirmed on 21st September, 2007 that our approach in using version 7.0 of Domino and 8.0 was “supported”

At the Implementation Steering Committee meeting on 15th November, 2007 (Action **151107.03**) the Project Team was requested to take a look at the possibility of upgrading the existing Domino 7.0 Servers to the latest version 8.0. IBM was also engaged to provide some background information as well as to the benefits of moving to version 8.0

At the meeting of the Implementation Steering Committee on 23rd November the following decision was made in **231107.02**:

Consensus from the Implementation Steering Committee was that we would begin the process of moving to version 8.0.

Approach

- *Continue Pilot*
- *Continue the migration of R&A and ITS on 3rd December*
- *Tie off PDA synchronisation with WEA Server*
- *If there are fixes required for Domino v 7.0 – ignore unless of critical nature*


 **Note:**

For further information please refer to the document Server Options Rel 8.0 - v1.0-1

Domino's Migration from version 7 to 8 is expected to be implemented mid 2008 and will be a phased approach to reduce risk. Full migration to Domino's 8 is anticipated soon afterwards.

Continued conversion rollouts will be progressing at rate of approximately 40 end users per day.

The following products are in scope for the WCR Project:

- Lotus
 - Domino's Messenger Server
 - Email (also known as Lotus Notes) which encompasses:
 - Calendar
 - To Do Lists / Tasks
 - Address Books / Contacts
 - Lotus Quickr – collaborative team workspace including document distribution
 - Lotus Sametime – instant messaging, presence detection, share your desktop ,and VoIP chat within the Monash IT Infrastructure boundaries.
 - EasySync - PDA synchronisation
 - At the end of November 2007, Monash University was advised that Websphere Everyplace Access – (WEA) is now at end of life. The new product – Lotus Traveller will be released in Domino 8.01 in January 2008
 - EasySync is installed locally on a PC/Laptop and is generically supports Windows Mobile and Palm PDAs.
-  **Note: The scope of the PDA service will be reviewed once more is known as to the functionality and the devices supported under Lotus Traveller.**
- Migrating email from current servers to new domino servers
 - Implementing new Web based email by access through my.monash portal.
 - Integrating these systems with the existing Monash Infrastructure

The Project will deliver the following Technical environments:

- Proof of Concept – completed August 2007
- Training and Development – completed August 2007
- Production – completed September 2007

The Project will deliver the IBM solution to Staff and the email component to Students at:

- Berwick Campus (approx. 220 Workstations)
- Caulfield Campus (approx. 1830 Workstations)
- Clayton Campus (approx. 12,000 Workstations)
- Gippsland Campus (approx. 820 Workstations)
- Malaysia Campus (Workstations to be confirmed)
- Peninsula Campus (approx. 620 Workstations)
- South Africa Campus (Workstations to be confirmed)

The Project will provide the following migration process

- The design and implementation a solution to facilitate the migration of Server side Calendar data from the current Netscape environment to the Lotus Notes environment
- The design and implementation a solution to facilitate the migration of email and contact data from the current Mozilla Thunderbird environment to the Lotus Notes environment. This includes both server and local data.
- The implementation of a new web-based email interface to replace the existing client at calendar1.monash.edu.au
- The migration of all Calendar resources currently used in Netscape Calendar such as
 - Meeting Rooms
 - Projectors
 - White Boards
 - Scientific equipment, Cars etc.

At a minimum, the Project will provide the following training:

- User training that enables end users to continue to perform routine activities when they transition from the existing to the new Lotus notes based environment, including:
 - How do I send or reply to a message?
 - How do I book a meeting with someone?
 - How do I book a resource?

The Project will also provide training for desktop support staff (ITS and faculties) who will be rolling out WCR and upon whom the Project depends upon to support the services properly.

- User training that enables end users to have the ability to:
 - How do I send or reply to a chat session?
 - How do I share my desktop?

The Project will:

- Decommission the Netscape Calendar service
- Decommission the existing staff email servers.
- Implement the provision of on line training materials via Lotus Notes clients and the ITS website
- Implement the installation and support of 3rd party training materials and products purchased by the University
- Implement the installation and support of training materials and products provided with Lotus Notes Software

3.3 Out of Scope

- Update of current SOE to include new collaboration applications
- Migration of archived Calendar data (eg. Data stored on a user's desktop computer)
- Decommission of the Thunderbird application
- Decommission of Jabber instant messaging Service (ITS only)
- Writing of any Domino applications incorporating workflow process
- Any email client other than Mozilla Thunderbird
- Any calendar client other than Netscape
- Any other interfaced or connectivity with projects such as Video Conferencing & Voice over Internet Protocol (VoIP), this is scope of the Sametime Integration (SI) project.

3.4 Assumptions

The major assumptions made in formulating this project plan and the schedules and resource estimates supporting it are:

- That IBM will deliver Lotus Notes v8.01 by end January 2008

- That IBM will deliver Domino Version 8.01 by end January 2008. That IBM will deliver Sametime v8.0 by end of January 2008.
- In most cases version 8.0 or 8.01 will be delivered to the Desktop via Zenworks prior to users migrating to Lotus Notes.
- Domino Version 8.0 and 8.01 on the back end infrastructure is compatible with the 8.0 and 8.01 client.
- That the University community allows changes to be made and can contribute sufficient staff time to enable the migration to Lotus Notes and staff training
- That faculties and divisions will provide local IT support in migrating users
- Only basic, off the shelf functionality will be provided initially. It is however anticipated that at least the same functionality currently provided in Mozilla Thunderbird and Netscape Calendar will be provided in Lotus Notes. Extended Business requirements will be incorporated into the schedule at a later date.
- All other sites that are not detailed above (such as Monash Medical Centre) will have Lotus Notes delivered by the Faculty that is accountable for their own Technical Support.

3.5 Constraints

The major constraints on this project are:

- Resourcing with specialist staff from within IBM to assist with developing the migration processes for both email and calendar.
- Resourcing and availability from Vendors.
- Migration/Rollout of End Users is the ability to migrate at a maximum 40 people per day for approximately 3 to 4 days per week and the 4th or 5th day to assist local IT support in responding to incident records.
- Upgrading to RedHat 5.1 with Domino's Version 8.
- General availability of Lotus Notes 8.5 client for MAC and other forms of Linux
- Hardware acquisition for South Africa.
- Resources attending operational activities.

Project Approach

3.6 Overview

As the Implementation Steering committee approved the moving of Domino 7.0 Servers to Domino 8.0, the approach to the Project has now changed from the original plan.

As mentioned in section 3.2.1 the approach has changed so as the Project can focus on upgrading the Infrastructure to Domino version 8.0 and Domino 8.01 whilst maintain a rollout of Lotus Notes across the University.

 **Note:**

It is the intention of the Project to await the arrival of Domino Server 8.01 scheduled for the end of January 2008.

The overall WCR Project will continue to be undertaken in a series of Phases:

3.6.1 Phase 1

Stage 1

- Finish Pilot of app 40 Users
- Continue rollout to ITS
- Continue rollout to University
- Rollout Lotus Notes PDA software ('EasySync') to enable legacy migrated Lotus Notes users to utilize their PDA in conjunction with Lotus Notes.
- Install a new Training and Development Environment with Domino Version 8.0 so as the Project can:
 - Conduct IMS Testing on these Servers to ensure all functionality is the same as the existing Domino 7.0 environment
 - Conduct Change Management Testing to ensure all functionality is the same as the existing Domino 7.0 environment

 **Note:**

Once all tests have been completed on the Domino 8.0 Training and Development environment, the Project Team will sign off that the environment is at similar state to the existing Domino 7.0 Training and Development environment. The Project will then start the process of upgrading the existing Domino 7.0 Production System.


Stage 2

- Continue rollout to University

There are four clusters that comprise the Domino Infrastructure. To move to Domino version 8.0 the following process will be undertaken:


- Migrate users off 2 of the 4 Domino 7.0 clusters
- Consolidate all users onto 2 Domino 7.0 clusters.
- The now 2 empty Domino 7.0 clusters will have RHEL 5.1 installed and tested
- Domino version 8 will then be installed on the 2 clusters and tested.
- A pilot group will then be put back onto the 2 Domino 8.0 clusters. This will comprise mainly of ITS staff and a mix of business users.
- Once the Identity and Messaging Services (IMS) Group is happy that Domino 8.0 cluster is stable, the Project will co-ordinate the approach to migrate users across to the 2 Domino 8.0 clusters.

Stage 3

- Continue the rollout of Lotus Notes (including calendar and email) to the Netscape Calendar Staff users (app 3500 Users)
- The rollout of Lotus email to the remaining Mozilla Thunderbird email users at Monash.
- The rollout of Lotus Notes Traveller (PDA Service). This is limited to cabled or cradled PDAs PDA's that can connect wirelessly – 'OTS' (Over The Air) can update their Emails only.
-  **Note: The scope of the PDA service will be reviewed once more is known as to the functionality and the devices supported under Lotus Traveller.**


3.6.2 Phase 2

Stage 1 – The rollout of Lotus Notes to Malaysia

 **Note:** Phase 2 can be run simultaneously with Phase 1

3.6.3 Phase 3

Stage 1 – The rollout of Lotus Notes to South Africa

 **Note:** Phase 3 can be run simultaneously with Phase 1 and 2

3.6.4 Phase 4

Stage 1 – The rollout of Lotus Sametime after the Domino's Server 8 upgrade

Stage 2 – The rollout the Lotus Quickplace service after the Sametime implementation

Stage 3 – The rollout of IBM Traveler

FINAL

3.7 Project Approach to Rollout

As the WCR Project is dealing with users' main day to day tools, a conservative approach has been taken to ensure that the likelihood of failure is alleviated through detailed planning and risk mitigation.

As the scope of the Project involves rolling out the IBM solution to the entire Monash community, the Project determined that to undertake this in one massive implementation would be too risky due to the sheer number of users involved. Although migration of data would happen in a matter of days or weeks, there is no practical roll back strategy if problems are encountered during this period. It is therefore recommended that a staged approach be taken.

As there are 3500 Calendar users within Monash, the Project has determined that those users will be targeted first. The logic behind this decision is that Monash is exposed to the risk associated with Netscape Calendar being unsupported. The Project also wishes to minimise the dysfunction associated with the migration of Netscape Calendar to Lotus Notes Calendar. To ensure that users are minimally impacted, the Project will develop a process to migrate user data from their existing Netscape Calendar to the new Lotus Notes Calendar. The Project will also develop a further process to migrate User data from their existing Mozilla Thunderbird email to the new Lotus Notes email. This will be completed simultaneously. ie. When a Calendar user is migrated, their email and calendar data will be migrated prior to them getting access to the Lotus Notes client.

The initial rollout to all Users is limited to providing email, to-do, contacts, Calendar and EasySync (PDA Software).

The Project will therefore:

- Rollout Lotus Notes v8.00 to 40 users as a pilot initially.
- Rollout Lotus Notes v8.00 to all ITS Users.
- Rollout Lotus Notes to 3500 Calendar users in Monash Australia.
- Rollout Lotus Notes to the remaining users with email at Monash Australia and Malaysia and Monash South Africa.
- The order of which organisational groups will be rolled out with the Calendar and email functionality will be decided in consultation with the Change Programme and key business figures later in the schedule.

As well as the remaining email users, the order of which organisational groups and divisions will be rolled out with email will be decided in consultation with the Change Programme and key business figures later in the schedule.

3.7.1 Project Approach to Training

The WCR Project acknowledges that the Change Management Team will be accountable and responsible for overall Change in ICE Program which includes end user training.

As a deliverable to the WCR Project however the undermentioned is the minimum required by the WCR Project for rollout.

- Basic functionality of email
 - How do I send a message?
 - How do I reply to a message?

- Basic functionality of Calendar
 - How do I book a meeting with someone?
 - How do I book a room?
 - How do I book a resource such as a Projector, Whiteboard, Cars and Conference Call
 - Other basic calendar functionality

It is desirable that transition training occurs prior to any rollout to the organisational group being undertaken by the WCR Project. as groups will be impacted by the change. The WCR Project strongly recommends that groups take advantage of the offer for training prior to rollout to minimise any inconvenience.

3.8 Quality assurance

Quality will be assured through following the Monash standards and processes (see Related Documents). These processes include defining responsibilities, controlling documents and data, ensuring deliverables are reviewed and authorised before issue, regular monitoring and reporting and management of risk.

3.9 Project urgency and priority

3.9.1 Overview

The WCR Project is seen as one of Monash's highest priority Projects. As a result the Project implemented a strategy to fast track progress of the Project. One of these strategies was to create the ICE Implementation Steering Committee (ISC). The ISC meets and is updated each week by the Project Manager on progress, status of existing issues and risks as well as any new issues and risks. This has assisted the Project in fast tracking the timeframes, together with giving weekly visibility to the ICE Implementation Committee.

The ISC is made up of the following people:

- Jack Chorowicz
- Byron Kirby
- Alan McMeekin
- Elizabeth Martin
- Leon Troeth
- Daryl Wood
- Raymond Lau

3.9.2 Fast Tracking Implementation

The following was then agreed upon to enable the Project to expedite progress:

- That the Project would implement the “out of the box” infrastructure in the phases of ‘pilot’ and ‘rollout’. The ‘pilot’ would be introduced to a small select group who would provide feedback to the Project Team/Business Change Team. Changes to the method or configuration of the software maybe made if required. Once the ‘Pilot’ is deemed successful, then the ‘rollout’ would commence in accordance with the Business Change Team’s recommendation.

3.10 Timetable and Key Deliverables

Deliverables	Date	Definition	Who
Complete Pilot	30 th November, 2007	Pilot to initial 40 users completed	Project Team
Start rollout	3 rd December, 2007	Start the rollout to University	Project Team
Sign off updated Final Project Charter	31 st January, 2008	Sign off on the Project Charter that has the final schedule included.	Raymond Lau
Receive Lotus Notes for Windows version 8.01	31 st January, 2008	Have IBM provide the WCR Project with Lotus Notes version 8.0.1	IBM
Receive Domino version 8.01	31 st January, 2008	Have IBM provide the WCR Project with Domino version 8.0.1	IBM
ITS rollout completed	31 st January, 2008	All ITS Staff have Lotus Notes	Project Team
Install new Training and Development Environment with Domino version 8.0	December 2007	Install new Training and Development Domino version 8.0	IBM and IMS
Start testing new Domino version 8.0 environment	December 2007	Change Programme and IMS begin testing the new Domino 8.0 environment	Change Programme and IMS

.Deliverables	Date	Definition	Who
Begin upgrade of existing Domino Servers from version 7.0 to version 8.0.1	June, 2008		IMS
Finish upgrade of existing Domino Servers from version 7.0 to version 8.0.1	August 2008		IMS
Deliver Sametime solution to Change Team	January 2009	No integration with VoIP or Video Conferencing	Project Team
Deliver Quickplace solution to Change Team	March 2009		Project Team
Deliver Traveler solution to Change Team	June 2009		Project Team
Rollout Monash Messaging Service (MMS) to Malaysia	TBC	All Malaysian users are migrated to the MMS.	Project Team and Malaysia
Rollout Monash Messaging Service to South Africa	TBC	All South African users are migrated to the MMS.	Project Team and South Africa
Complete migration of 3500 Calendar users	June, 2009	All users of Netscape Calendar are migrated over to the new MMS	Project Team
Complete migration of all Monash email users	June 2009	All users of Monash's mail system are migrated from exiting email system to new MMS	Project Team
PIR	TBC	Post Implementation completed	Project Team
Project Complete	TBC	Project Closure document	Raymond Lau

4 Success Factors

4.1 Primary Success Factors

The critical success factors for the WCR Project are that the:

- Infrastructure to support the environment is deployed
- Infrastructure is configured and operational ready for deployment
- All identified Calendar users are migrated
- All identified email users identified are migrated
- Transition training has been completed
- PDA synchronisation is provided and working for direct attached devices.

4.2 Secondary Success Factors

- The remaining Services detailed below are delivered
 - Instant messaging, share your desktop, presence awareness, online meeting
 - Team Workspaces, Content library
 - PDA Synchronization

5 Managing Risk, Issues and Change

5.1 Risk Assessment

The above Risks are updated weekly in Spreadsheet <V:\ICE\ICE Program Issue and Risk Log.xls>

5.2 Issues

The above Issues are updated weekly in Spreadsheet <V:\ICE\ICE Program Issue and Risk Log.xls>

5.3 Change control

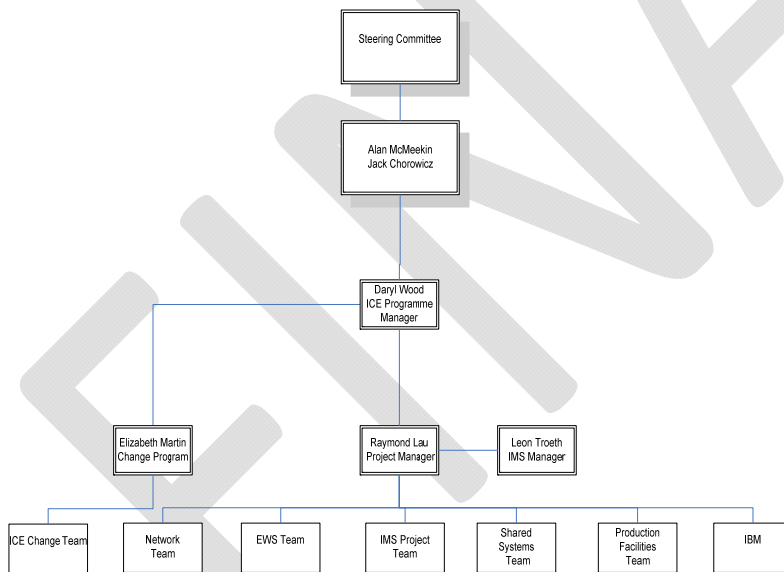
Changes to scope or deliverables will be managed through standard Monash University Project Change Management Methodology. Any variations to this process will be agreed with the project sponsor.

Technical Change will be managed by the appropriate Technical Areas.

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6 Organisation and Resources

6.1 Project Organisation Chart



6.2 Project Roles and Responsibilities

This section describes roles and responsibilities specific to the project.

6.2.1 Project Sponsor

- Ensure that the solution proposed and delivered is consistent with the agreed Monash need;
- Ensure that the assumptions, expectations and economics driving the Business Case remain valid and relevant throughout the project life-cycle;
- Deliver the benefits of the project – including ownership of benefits realisation post project close;
- Represent the Monash view in key decisions;
- Resolve project issues outside the control of the Project Manager – including escalation issues;
- Champion recommendations to the relevant approval authority;
- Chair the Project Steering Committee

The Project Sponsor will not:

- Be accountable for day to day management of the project
- Approve changes that move the project outside of the boundaries approved by the relevant approval authority for the project.

6.2.2 Project Steering Committee

The Steering Committee will:

- Champion the cause of the project in the broader Monash environments;
- Jointly, with the Project Sponsor, ensure that the assumptions, expectations and economics driving the Business Case remain valid and relevant throughout the project life-cycle;
- Review performance against deliverables for just completed Phases/ Stages;
- Advise and direct the Project Manager regarding matters of project execution, including issues threatening plan viability, scope, communications, stakeholder management, resources, quality, risk and strategy/architecture alignment;
- Resolve issues escalated to the Project Steering Committee by the Project Manager, and
- Provide leadership and guidance to the Project Manager;
- Develop and manage the project relationship;
- Set the strategies for the Project deliverables;
- Oversee the implementation and management of the Project;
- Review Project performance;
- Provide sign off for key deliverables;
- Manage Project variance;
- Monitor achievement of Project deliverables and Project health status;

- Ensure resolution of escalated issues;
- Ensures Project objectives are met;
- Review, prioritise and approve changes.

The Project Steering Committee will not:

- Be accountable for delivering Project benefits;
- Take a hands on role in the management of the Project.

6.2.3 Programme Manager

The responsibilities of the Programme Director are to:

- Monitor the project for compliance with standards and processes required by Monash and the ITS Division.
- Provide information and informed opinion to the Executive Sponsor and Steering Committee on project issues.
- Provide information and reporting as required on all projects in the ICE Programme and highlight program level issues as appropriate.

6.2.4 Project Manager

The Project Manager will report to the Programme Manager

The responsibilities of the Project Manager are to:

- Attend and Chair Project meetings;
- Report Project Status to the Programme Manager;
- Produce fortnightly status report;
- Develop and maintain the Project Charter;
- Develop and maintain the Project Work Breakdown Structure;
- Ensure all appropriate Monash groups are engaged as required and are tracking to plan;
- Keep Programme Manager fully apprised of project progress;
- Ensure project meets its financial, timeframe and quality targets;
- Assemble and manage the core Project team;
- Define the responsibilities, work breakdown and targets for each team leader or member;
- Manage the resource requirements for the Project in terms of type, quality and volume;
- Manage relationships with supply agents (eg IBM);
- Monitor and manage Project progress;
- Monitor and manage Project finances;
- Monitor and manage risk and opportunities;
- Manage the resolution of Project issues;

- Manage the scope of the Project and control changes;
- Communicate with and manage stakeholders (including the Steering Committee);
- Ensure the Project deliverables are provided on time, within budget and to the agreed level of quality;
- Manage the closure of the Project.

The Project Manager will not:

- Be accountable for delivering Project benefits
- Approve changes that move the Project outside of the boundaries approved by the Project Sponsor
- Raise Technical Change requests

6.2.5 IT IMS Manager

The IT IMS Manager will report to the Project Manager and have a dotted line to the Steering Committee.

The responsibilities of the IT IMS Manager are to:

- Create and Maintain Work break down structure inline with the overall WCR schedule;
- Provide IT technical leadership in formulating the proposed solution from an architectural and implementation view
- Provide IT technical guidance in recommending solutions to problems
- Manage staff in operational and project tasks – this relates to technical resolutions, meetings, human resource issues, support records etc..
- Raise Change records to initiate work

6.2.6 Business Units

Each Business Unit will be responsible for their work and workflow. Milestones and key tasks will be tracked by the Project.

7 Communication

As the WCR Project is a part of the overall ICE Programme, it is the intention of the WCR Project to continue to ensure that Communication to the wider Monash User base Community continues to come from the one source. Therefore, any Project related announcements will be managed jointly.

The WCR Project therefore will maintain communication *within* the Project, whilst broader Communication will continue from the Change Programme area managed by Elizabeth Martin.

Information Genre	Format	Guidelines	Responsibility
Project Status Reports	Word Document	Monthly Report	Raymond Lau
Project Communication – Within Project	Word Document Excel MS Project	Any communication within the Project such as : <ul style="list-style-type: none"> • Communication to the Project Team • Communication to the Steering Committee • Communication to the Project Sponsor 	Raymond Lau
Project Communication – User Community		Any communication regarding the Project timeframes and/or schedule	Elizabeth Martin Raymond Lau
User Communication		Any user Communication not dealing specifically with timeframes and schedules	Elizabeth Martin

8 Reports and Meetings

8.1 Reporting

Regular status reports (monthly) will be provided to the Programme Director by the Project Manager.

8.2 Team meetings

Project members will meet on a weekly basis to update the Project Manager on progress made and issues to be resolved. Minutes of each meeting will be produced by the Project Manager and circulated within 24 hours of the Project meeting.

8.3 Project meetings

The Project Manager will meet once a week with the ICE Programme Director to review progress. A Status Report will be produced on a monthly basis detailing the status of the Project. Any issues and risks will also be tabled.

9 Stakeholders

The stakeholders for this project are:

Stakeholders	Critical/Essential/Interested parties
Alan McMeekin	Critical
Jack Chorowicz	Critical
Byron Kirby	Critical
Daryl Wood	Critical
Elizabeth Martin	Critical
Leon Troeth – Identity and Messaging Services	Critical
Ed Sheaf – Enterprise Workstation Services	Essential
Alfred Tan – Shared Systems	Essential
Tom Maher – Network Services	Essential
Steve White – Production Facilities	Essential
Faculty I.T. Staff	Essential
Faculty Managers	Essential
All Staff & Students	Interested parties

11 Appendix B: WCR Terms of Reference

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11.1 Workgroup Collaboration Review – Terms of Reference

ITS will commission a consultative review of workgroup/collaboration services. The review will be focussing specifically on the staff environment, though it is expected that some of the selected products would also be rolled out to the student environment in due course. A wide range of stakeholder groups within the University will be consulted regarding their requirements for workgroup/collaboration services, including:

- Email
- Scheduling
- Instant messaging
- Document sharing
- Collaboration groups, online discussion forums, etc
- Mailing lists
- Voice services to the degree they can be integrated into other solutions
- Desktop based video conferencing
- Web conferencing, including shared applications and whiteboards
- Collaborative workspaces that include some or all of the above components

The review will also consider related technology that is used to interface with workgroup/collaboration services, such as:

- Personal Digital Assistants (PDAs)
- Email clients
- Calendar clients
- Monash supported web browsers (Internet Explorer and Firefox/Mozilla)

- The Monash Public Key Infrastructure (digital certificate services)
- Workflow management capabilities that are included as part of potential solutions

The implementation of selected products will be staged over a number of years starting in 2006, with a replacement for the Monash Calendar service being the immediate priority.

Out of Scope

The following services are out of scope for this review:

- Voice services (PABX and telephone handsets).
- Directory services – white pages information is already provided via a number of interfaces. Research interests, etc are being provided as part of the Research Directory project.
- Email routing infrastructure – including email delivery, virus scanning and spam scanning.
- Public Key Infrastructure (digital certificate services).

Aims of the Review

The aims of the review are to:

- To establish the long term needs of the University with regards to workgroup/collaboration services,

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- To establish the key functionality for each of these areas that will meet the long term needs of the University,
- To establish selection criteria for choosing products to meet these needs,
- To prioritise and weight the needs,
- To review the main commercial providers of workgroup/collaboration systems including Sun, Microsoft, IBM, Oracle and Novell. Relevant open source solutions will also be considered.
- To recommend solutions in each functional area taking into consideration integration with existing infrastructure, integration across all functional areas and compliance with recognised open industry standards,

- To prepare budget proposals for allocation in 2006 and 2007 and determine a pilot and rollout strategy for recommended solutions.

Governance and Process

The process will be overseen by a project sponsor and a steering committee.

Project sponsor: Alan McMeekin, Executive Director, IT Services

Steering committee membership:

- Jack Chorowicz, Director, Infrastructure Services, IT Services (Chair)
- Muhamed Bekir, Manager, Technical Services, Faculty of Information Technology
- Sharon Fitzgerald, Manager, Technical Services, Faculty of Education
- Steve Scroggie, Faculty Finance & Resources Manager, Faculty of Science
- Andrew Treloar, Information Management Strategy, IT Services
- Janet White, Faculty Manager, Faculty of Law
- David Benstead – External consultant (Advisor to the Steering Committee)
- Tanya Hardidge, IT Services (Committee secretary)

An external consultant will be engaged to consult widely with stakeholders across the University regarding their requirements, both from a user's perspective and from a technical perspective.

The consultant will prepare a list of requirements and conduct an RFP process.

A technical review committee will be established to review the vendor solutions and to report on which products best meet the established requirements.

Technical review committee membership:

- David Benstead – External consultant (Chair)
- Alister Air (Faculty of Business and Economics and TWP Steering Committee representative)
- Nathan Bailey (ITS – Flexible Learning and Teaching)
- Janet Brennen (Records and Archives Services)
- Brad Ellis (ITS – Security and Risk group)

- Shane Hjorth (ITS – Identity and Messaging Services)
- Nick Love (Victorian College of Pharmacy)
- Peter Nankivell (Faculty of Information and Technology)
- Steven Oxley (ITS – Shared Systems)
- Tim Stephens (Financial Resources Management)

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- Jamie Sunderland (ITS – Client Services)
- Adrian Tritschler (ITS – Enterprise Workstation Services)
- Leon Troeth (ITS – Identity and Messaging Services)
- David Yammouni (Faculty of Education)
- Tanya Hardidge, IT Services (Committee secretary)

The steering committee will then be responsible for choosing the solution(s) that are to be implemented, and their priority.

A user reference group will be established and will be consulted during the review process, regarding both the requirements analysis, and the solutions that are being considered. The group will consist of Faculty and administrative unit nominated non-technical staff.

User reference group membership:

- External consultant (Chair/convenor)
- 4 x senior management representatives
- 4 x personal assistant representatives
- 4 x administrative staff representatives
- 4 x teaching and research staff representatives
- 4 x research representatives
- 4 x student undergraduate student representatives
- 4 x student postgraduate research student representatives

The membership of the group can change as required, and meetings of the group are open to any other interested parties.

Prepared by: Leon Troeth, Manager, Identity and Messaging Services

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