

IST Transition Team work Group Project

General Information			
Proposed Project Name:	Web-based Team Workspace/Collaborative Tool (Phase 1 of 3)	Date:	August 18, 2006
Unit:	Data Services – CPA – Collaboration Services	Modification Date:	September 1, 2006
Prepared by:	Ian Crew, Aron Roberts, Rick Jaffe	Authorized by:	IST Directors 9/6/2006
Description of Proposed Project			
<p>Scope and Objectives</p> <p>To perform phase one of a project whose overall goal is to select a repository or repositories for shared data that inter- and intra-departmental teams within IST can use as they perform collaborative work on projects. Its goal is <i>not</i> to replace project management tools such as Microsoft Project.</p> <p>Phase one will consist of research related to collaborative workspace tools. This will include:</p> <ul style="list-style-type: none"> • Gathering the needs for IST-wide web-based collaborative workspace tool(s) for use by IST project teams along with others (customers, other campus IT staff, etc.) involved with the projects. • Investigating the capabilities of a likely subset of the tools available, including features as well as data storage and interchange architecture. (The huge number of available tools makes it impossible to do a complete survey.) • Develop criteria for use when selecting and recommending tools during phase two of the project • Preparing a brief report outlining key customer requirements, an overview of the tools investigated, and the suggested decision criteria for phase two of the project. <p>The second phase of the project will be to select and propose the method of implementation for a single (or small number of) these tools. The third phase will be to implement the proposed tool(s). At the conclusion of the third phase, we anticipate that the directors may decide to mandate the use of this tool(s). Because of that, our goal is to work towards a tool or tools that are broadly useful and appealing across IST—in short, a tool or tools that IST staff will <i>want</i> to use.</p> <p>Examples of tools already in use within IST for this purpose include Basecamp (see http://basecamphq.com/tour-dashboard.php), BearShare (an instance of SharePoint—see http://www.microsoft.com/office/sharepoint/prodinfo/default.msp), and bSpace (an instance of Sakai—see http://sakaiproject.org/). We plan to start our investigation with these tools.</p> <p>We envision that this tool or tools might include capabilities like:</p> <ul style="list-style-type: none"> • Collaborative editing of documents • To-do lists • File storage • Email list archiving • Listings of important dates (meetings, milestones, deadlines) <p>The tool or tools should (at a minimum) meet the following technical criteria, and we will therefore stop investigation of products that clearly do not:</p> <ul style="list-style-type: none"> • Integrate smoothly with other project-related tools such as the selected Project Portfolio Management Tool, bug tracking, and ticketing systems. If more than one tool is selected in phase two, this would also include interoperation between the collaborative workspace tools. • Allow IST staff using varying computing platforms to take advantage of the full capabilities of the tool. • Acceptably export content to a successor tool or service. 			

Justification/Benefits	
<ol style="list-style-type: none"> Teams within IST currently use a number of collaborative workspaces including BearShare, bSpace, Basecamp, etc. Having a common tool will provide a number of benefits, including: <ul style="list-style-type: none"> Reduced overhead by managing a single system or small number of systems rather than three or more. A single or small number of locations for IST staff members to check for information related to the projects they are working on, reducing the need to manage multiple logins and passwords across tools. Reduced training and support costs for IST staff Increased familiarity and productivity with the selected tool(s) Increased ease of starting up cross-IST and cross-campus project teams. A common tool or tools will make it easier for IST Management to oversee project teams and track the progress of projects across the organization. This project will move our group towards work looking at overall campus needs for collaborative tools, even though the focus of this project is within IST. 	
Assumptions/Constraints:	
<ol style="list-style-type: none"> The tools we are researching will only provide collaborative workspaces. If a tool provides other capability, we will mention but not research those capabilities. We assume that, given a successful conclusion to each phase of this project, there will be management support for performing the subsequent phases. Phase one of this project will build the groundwork for phases two and three. 	
Risks	
Known Risks to Project Success	
<i>Phase one:</i>	
<ol style="list-style-type: none"> Failing to identify the critical requirements of IST staff, either by missing requirements or by not effectively prioritizing their requirements. Becoming bogged down in sorting through the myriad attributes of the vast number of potential tools available on the market today. The soon-to-be-appointed Deputy CIO for IST may have a different tool or tools that he or she wants us to use for this purpose. 	
<i>Later phases:</i>	
<ol style="list-style-type: none"> Failing to achieve reasonably enthusiastic buy-in for the recommended tool from IST staff. Failing to select a tool that allows us to migrate from (or, if necessary, interoperate with) currently-used collaborative work space tools (such as BearShare, bSpace, Basecamp) Selecting a tool that can't be implemented quickly due to funding constraints or licensing issues. Selecting a tool that can't be brought up and running quickly, either on a hosted service or on a service administered by IST staff. Selecting a tool that doesn't implement one or more key customer requirements. Selecting a tool that has a steep learning curve or other serious usability impediments to adoption. 	
Resource Needs (space, staff, budget, etc.)	
Resources Required	Special Resource/Skill Needs
One representative from each IST department to be a part of the project team.	Experience with project or team leadership
Access to tools being evaluated, which may in a few cases require short-term software licenses or subscriptions.	Experience with the tools currently in use in IST
Estimated Cost	Estimated Start Date: 9/1/06
\$0-\$1000 in addition to staff time	Estimated End Date: 10/15/06

Project Approach					
Activity Description <ul style="list-style-type: none"> Consult with stakeholders to perform a needs analysis for this category of tools. This includes investigating which features of current tools are especially liked, as well as those features that are most heavily used. (2 weeks) Examine gathered requirements and look for common themes. Create a short (less than 10 item) list of “essential” and a somewhat longer list of “nice to have” requirements. (1 week) Learn about the potential solutions available, including identifying tools currently used within IST and identifying promising tools, if any, that are not currently used. Following identification and preliminary investigation, test promising tools against the requirements lists and data standards. (5 weeks, can be done in conjunction with first two tasks) Assemble final report, outlining key customer requirements, an overview of the tools investigated, and the suggested decision criteria for phase two of the project. (1 week) 					
Participant Roles					
Name	Project Manager	Sponsor	Project Team	User/Client	Stakeholder
(Note: As everyone in IST is a potential or likely user of this system, we have excluded that column from the list of participants below)					
David Greenbaum		X			X
Ian Crew	X				
Aron Roberts			X		
Rick Jaffe			X		
Representative from Client Services with project or team leadership experience			X		
Representative from Infrastructure Services with project or team leadership experience			X		
Representative from Application Services with project or team leadership experience			X		
Representative from CIO’s Office with project or team leadership experience (likely Dianne Walker)			X		
Cliff Frost/IS Leadership Team					X
Helen Norris/CS Leadership team					X
Kelly Haberer/AS Leadership Team					X
David Greenbaum/DS Leadership Team					X
Laura Kim/Transition Team					X
Jon Conhaim/Project Portfolio Management Team					X
Bill Allison					X
Michael Green					X
Natalie Kato/BC&C					X
Kalle Nemvalts/IST Web					X

Team					
Raymond Yee					X
Patrick McGrath					X
Randy Ballew/Common Tools Analysis Team					X
Others as identified by project team					X