SharePoint Best Practices (Phase 1) Project
Improving the SharePoint experience and showcasing exemplars

PROJECT BRIEF

Project abbreviation	SPBP1
Project Title	SharePoint Best Practices (Phase 1) Project
Start Date	1 June 2012
End Date	31 May 2013
Project Sponsor	Dr Michael Fraser
Project Manager & contact details	**Name:** Dr Mark Norman **Email:** mark.norman@oucs.ox.ac.uk **Address:** Oxford University Computing Service, University of Oxford, 13 Banbury Road, Oxford OX2 6NN **Tel:** 01865 273287 **Fax:** 01865 273275
Collaborating department(s):	PICT funded. Social Science Divisional Office, Council Secretariat

1. Purpose of this document

This document is a lightweight project management document, including the business case, objectives, deliverables, schedule and significant risks of the project. The document will be updated monthly, with the recent changes <mark>highlighted thus</mark>.

2. Background

The Nexus SharePoint service was launched in April 2011 for the collegiate University after an early adopter period. It has been recognised that, due to its beginning from a low starting point of understanding that potential, the uptake needs to be stimulated in order for the service to be as successful as possible. Currently the Nexus team provides very little outreach and encouragement of best practice, but runs a robust, highly available service. In the early life cycle of a new service, this is not enough and the Groupware Programme Development Panel has acknowledged this in their request for enhanced support for several high profile committees and/or offices. These exemplars should serve as beacons of best practice at a later stage.

3. Outline Business Case

SharePoint has been a major investment and, in order to see a return on that investment, some stimulation of its use and the level of expertise available across the University is needed. Before SharePoint reaches a self supporting level (or adequately supported by local unit ITSS) some expertise must be generated regarding design, but also in how clients access the service.

Currently SharePoint is able to automate highly bureaucratic and time consuming business processes that are repeated around the University. It will not, however, be employed for these purposes until more people engage with it and achieve a level of competence in other areas, such as simple document storage. This project needs to build exemplars and how-to documentation, given the experience of solving some high profile committees' and offices' needs. This, in turn, should increase expert levels across the University and uptake of these business process opportunities.

4. Intended time scale

June 2012 – May 2013.

5. Objectives, Deliverables and Requirements

5.1. Project Objectives

- Engage with a major committee and office (such as a divisional office) in order to provide the expertise and research in order to address their end-to-end SharePoint needs (from site design to issues such as printing, document distribution and preferred client access, including mobile devices, iPads etc.)

- Improve the SharePoint sites for the above two sets of users to increase popularity and engagement in those sites

- Interact with the core user base of the above two situations in order to troubleshoot and improve the general quality of interaction with SharePoint; this includes assistance with client software and hardware

- Produce best practice documentation, exemplar sites/lists/libraries and how-to documentation in order for these to become beacons of best practice

- Look into the specific needs of large volumes of documentation for meetings (e.g. single paginated PDFs of many documents) and attempt to meet these needs within the lifetime of this project

- Seek official recognition from representatives from these two groups of users that the service is able to meet the functionality expected by them and meets their needs in terms of ease of use

- Investigate specific areas of functionality, which are known to be needed, such as providing users easy look-ups to show the different committees (and sites) of which they are members

5.2. Project Deliverables

- Business processes captured and delivered via SharePoint for Council Secretariat.[1]

- Business processes capturing and delivered via SharePoint for Social Sciences Divisional Office[2]

- Best practice documentation and two beacon site exemplars

- A set of recommendations regarding favoured software and ways of operating with regard to mobile devices such as iPads and Android tablets (N.B. These will be point-in-time recommendations as to demonstrated solution working adequately within the time scale of this project)

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[1] The number of business processes captured (and which they are) is to be defined within the project.
[2] Ditto the above note.

- At least one solution addressing the specific challenges of large volumes of documentation for meetings

- Plans or actual implemented solutions regarding specific areas of functionality
  - e.g., providing users easy look-ups to show the different committees (and sites) of which they are members
  - e.g. Collation and PDF production of documents for meetings

- Publicity of new materials and exemplars

- Statement that the software is, in principle, considered fit for purpose for the two groups selected for enhanced support

- Statement that the software meets the needs of the two groups in terms of ease of use

- Statement of recommended support model, following consultation with users from Council Secretariat and Social Sciences Divisional Office

5.3. Requirements

This project has no formal requirements gathering stage. Both the major groups will be engaged in two phases; initially to establish 3-4 requirements or initiatives and later, to reflect on these and to raise further requirements for work or development.

6. Stakeholder and/or User Groups

Our intention is to use the SharePoint Nexus User Group and the Groupware Programme Development Panel, as well as the Project Board as general stakeholder groups. The actual stakeholders will comprise the members of the Council Secretariat and Social Sciences Divisional office, and informal liaison with members of these groups will be continuous, and formal liaison is anticipated to occur every two months.

7. People, team and process

7.1. The Project Sponsor

Michael Fraser is the Project Sponsor

7.2. Project Management

7.2.1. The Project Manager

Mark Norman is Project Manager with supporting co-ordination work from Daryl Theobalds.

7.2.2. The Project Board

The Project Board is currently being assembled. The expectation is that the board will meet three times during the lifetime of this project. It will be chaired by Michael Fraser.

7.3. The Project Team

The Project Team is the group of individuals involved in the major work of the project. It may or may not include the Project Manager.

- Mark Norman, project manager, 0.2 FTE

- Daryl Theobalds, systems administrator, user liaison, task co-ordinator, 0.5 FTE

- Rob Eadie, user liaison, business analyst, 0.4 FTE

- We have some funds to temporarily co-opt expertise into the team as needed.

7.4. Constraints

General constraints include:

- Desktop support being provided from a variety of places. We will, occasionally, need desktop support to re-configure a desktop where administration rights are required.
    - However, part of the rationale of this project is for the Project Team to give direct support, which includes updating the desktop support teams of the users' requirements

- Urgent service work within the Nexus Team can occasionally affect scheduling (see Risks)

- Direct support from the Project Team to the users in the project may be unavailable on some days (due to the part-time nature of people on this project)

- Limitations of third-party tools: for some purposes this will be limited to what the market has available

7.5. Dependencies on other services

- See note above regarding desktop support (delivered mostly to our users via the ICT-ST and BSP)

- Occasionally we have a dependence on the OUCS web team in order to assist with documentation and CSS (screen layout etc.). The team is not always available.

8. Risks

8.1. Risks to the project

Possible risk	Likelihood	Severity	Risk factor (LxS)
1. Staff in units identified for engagement in this project are too busy/preoccupied at critical stages	2	2	4
Risk: Project stalls due to lack of progress and iteration between the stakeholders and project team.			
Mitigation: Frequent communications are needed to keep interest high in all of the participants. We will try to sustain frequent, short meetings, between the team and individual stakeholders rather than leave extended periods between meetings. A monthly update should be sent to stakeholders to maintain interest.			
2. A better tool than SharePoint is clearly available for the tasks identified	1	3	3
3. Members of stakeholder group change (e.g. due to work pressures, change of roles) during project.	3	1	3
4. Difficulty in scheduling meetings.	3	2	6
Risk: Time.			
Mitigation: Schedule all future meetings at first stakeholder meeting. Amend this schedule when necessary.			
5. Any custom development performed during the project is difficult to maintain thereafter	2	3	4

Possible risk	Likelihood	Severity	Risk factor (LxS)
Risk: Project benefits cannot be sustained.			
Mitigation: A relatively small amount of custom development (outside of the functionality already provided in SharePoint) is likely to be undertaken. Also, scope exists within our 'Development budget' to develop in-house or to obtain external expertise. We have budgeted for training in order to train internal staff to support any new code/configuration.			
6. Ongoing expert support is absent after a period of enhanced engagement	3	2	**6**
Risk: Project benefits cannot be sustained.			
Mitigation: The recurrent budget for SharePoint is not sufficient to cover the close engagement that this project gives. Therefore, the project has time allocated for an exit strategy. Also, one implicit aim of the project is to raise the general expertise with SharePoint, which mitigates this risk.			
7. Dependency on desktop support causes a delay in delivering functionality to users	2	2	**4**
Risk: Project delay and stakeholder frustration			
Mitigation: This is a threat that has been considered deeply, and is a motivation behind the project. If/when the first set of issues comes up that requires desktop changes, we will schedule a meeting with the local IT Support in order to involve them. It is likely that many desktop changes can be made without the direct input of local IT Support, but we need to be proactive in engaging these people.			
8. PDF conversion/compiling functionality benefits cannot be justified by costs	3	3	**9**
Risk: There is a chance that the numbers of users benefitting from the sophisticated features of PDF conversion and large document compilation will be so low as to merit a non-SharePoint solution for this functionality (i.e. a desktop conversion using stand-alone PDF software).			
Mitigation: We should either seek more funds so that this functionality is available in SharePoint 'just one click away' or document the recipe for doing this with SharePoint within the SharePoint support documentation			
9. Emailing SharePoint groups functionality problem	3	2	6
Risk: One – previously considered – quick win was to enable those who can managed SharePoint groups to be able to have them as emailable groups. This is something we have been asked within and without the project. There may be a bug as this functionality failed to work in December.			
Mitigation: There are some notes on forums showing that others have had similar problems but their work arounds do not seem to work for us. We may open a ticket with the Education Support Centre to get their and (possibly) Microsoft's recommendation.			

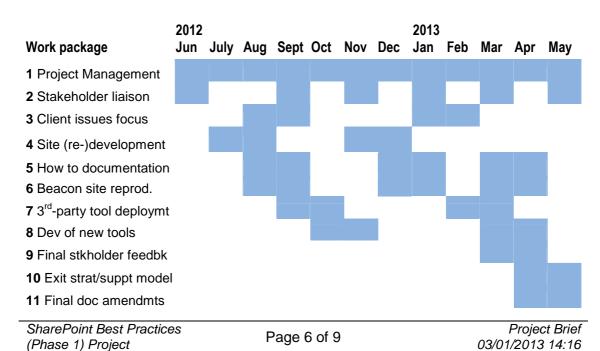## 8.2.   Risks to the organisation, department, team etc.

The main risk to the department (OUCS/IT Services) of this project not being undertaken, or performing badly, is that the value of SharePoint to the University will not be fully realised until a future date. There is also a risk that SharePoint could be perceived as an unnecessary overhead if the engagement level is not high enough.

9. Budget

The budget for this project has been approved and, initially broken down as follows. However, budget lines for Client Software specialist and 'Development budget' may be used differently as opportunities arise.

Cost/resource	FTE	Grade	Duration (months)	Cost to project	Notes
Sysadmin backfill	0.25	7	12	£ 10,440	To backfill a Grade 8 systems administrator (L2 support duties)
User liaison specialist	1	8	12	£ 50,023	Requirements gathering but excellent SharePoint expertise
Client software specialist	1	7	2	£6,960	Research into client software and mobile hardware use
Project management	0.2	9	12	£ 12,033	
Development budget				£ 16,000	(either outsourced primary development, but training an internal individual, or one or more members of University development staff)
Training budget				£ 3,000	Whatever technical advances are made or developed, they must be supported in-house in the future.
Total				£ 98,456	

10. Basic plan with time lines

Work package	2012 Jun	July	Aug	Sept	Oct	Nov	Dec	2013 Jan	Feb	Mar	Apr	May
1 Project Management												
2 Stakeholder liaison												
3 Client issues focus												
4 Site (re-)development												
5 How to documentation												
6 Beacon site reprod.												
7 3rd-party tool deploymt												
8 Dev of new tools												
9 Final stkholder feedbk												
10 Exit strat/suppt model												
11 Final doc amendmts												

10.1. Milestone summary table

Deliverable / Milestone:	Due Date:	Revised Date:	% Complete	Completed Date
Project kick off meeting	Jun 2012		100	**June 2012**
Kick off meeting with SocSciDO	Jun 2012		100	**June 2012**
Kick off meeting with PRAS/CoSec	Jul 2012		100	**July 2012**
Project plan first iteration	Jul 2012		100	**July 2012**
Key areas for development selected for SocSciDO (round1)	Jun 2012		100	**July 2012**
Business process analysis for key practices at SocSciDO (r1)	Jul 2012		100	**July 2012**
Demonstrate SharePoint Temporary Account Functionality with Esther Byrom (SocSciDO)	Jul 2012		100	**July 2012**
Key areas for development selected for PRAS/CoSec (round1)	Aug 2012	Oct 2012	100	**Nov 2012**
Iteration1: Finding people with similar interests (SocSciDO)	July 2012	Aug 2012	100	**Aug 2012**[3]
Iteration1: Suggested site improvement/permissions management of personnel records (SocSciDO)	Aug 2012		100	**Aug 2012**
Iteration1: Central calendar and poss bulletins for leave, WfH, important absence etc. (SocSciDO)[4]	Aug 2012	Sept 2012	100	**Sept 2012**
Reproduce Soc Sci Section 3 – Academic Appointments within their HoD handbook, in SharePoint	Aug 2012	<mark>Stalled</mark>	70[5]	
Business process analysis for key practices at PRAS/CoSec (r1)	Sept 2012	[6]	50	**Gradual/ constant**
Iteration1: Demonstrator of guidance Information supplied to departments (SocSciDO)	Sept 2012	<mark>Stalled</mark>	80[7]	

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[3] Decided that WebLearn may be the better vehicle

[4] N.B. The scope of this task has been limited as the requestor (Miia Laurikainen) has simplified the requirements

[5] Slow progress: The ability to convert Word Docs to HTML went live in early October (as a service). Waiting for content from SocSciDO.

[6] Instead of being carried out in wide iterations, this has been a gradual process based upon regular meetings. It has been focussed on Committee Site design and PDF conversion thus far.

Deliverable / Milestone:	Due Date:	Revised Date:	% Complete	Completed Date
Review use of Smartphones/ tablets by SocSciDO	Sept 2012		100[8]	**Sept 2012**
Iteration1: Show available functionality to 'find sites you participate in' (SocSciDO)	Sept 2012	Oct 2012	90	**Oct 2012**
Investigate Cambridge Univ. use of or interest in committee sites and PDF conversion	Sept 2012	Jan 2013[9]	40	
Team Calendar accessed via SharePoint for SocSciDO	Oct 2012		100	**Oct 2012**
PDF creation functionality (to meet CoSec req.mts) investigated online+off line	Oct 2012	Nov 2012	100	**Dec 2012**
Social Sciences Site Collection restructured	Oct 2012		100	**Oct 2012**
Committee site template restructured and simplified for CoSec/PRAS	Oct 2012	<mark>Jan 2013</mark>	90[10]	
Review, ending in recommendations of software (or browser) for mobile devices and SharePoint	Oct 2012	<mark>Jan 2013</mark>	80[11]	
Iteration2: Suggested site improvement/permissions management of personnel records (SocSciDO) to possibly include workflows				
User feedback re Ref 2014 Site (SocSciDO)[12]	Nov 2012	<mark>Feb 2013</mark>	40[13]	
General plan for Council committee (set of) sites	Nov 2012	Feb 2013	40	
Member(s) of Council Secretariat appointed to manage permissions to CoSec (etc.) sites	Nov 2012	Stalled	20	

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[7] This activity is now focussed on purchasing and deploying Alert Plus to 'push' information to recipients. Alert Plus is purchased but user documentation and SocSciDO content is outstanding.

[8] Divisional office, not much information but we now have a list of 6 members of the division (outside the SocSciDO) hence the later SharePoint mobile device milestone addition.

[9] After some difficulties getting a response from the SharePoint contact at Cambridge, now have 2 interested parties there. Likely to have a joint project meeting in January or Feb.

[10] Good recent progress but awaiting feedback from CoSec (PRAC secretary's evaluation).

[11] We very nearly have the knowledge required, but need to write up a report/recommendation.

[12] The site is finished but we would like (end) user comments.

[13] Probably trivial work to complete, but we have been asked to hold off from contacting participants until January.

Deliverable / Milestone:	Due Date:	Revised Date:	% Complete	Completed Date
Emailing SharePoint groups functionality (SocSciDO and CoSec)	Nov 2012	<mark>Feb 2013[14]</mark>	60	
Develop exemplar (for support site) of web part to list relevant sites based on the group/role of the viewer	Feb 2012		50	
Document exemplar functionality of Team Calendar accessed via SharePoint for SocSciDO	Feb 2012			
Social Sciences Site Collection final structure (ongoing project work)	May 2013		40	
Exit report recommendations for SharePoint expertise on the ITS Help Desk	May 2013			

11. Acronyms and abbreviations

Abbreviations used throughout this document are summarised below.

CoSec   Council Secretariat

ITSS   (Local) IT Support Staff

PRAS   Planning and Resource Allocation Section

SocSciDO   Social Sciences Divisional Office

Document History

Version	Date	Comments
0.7	13 July 2012	Project colleagues agree that this is a good starting point.
1.0	22 Aug 2012	Interim version on the way to being the August final version.
2.0	28 Sept 2012	Version for end Sept
2.1	26 October 2012	Version for end October 2012
3.0	4 December 2012	For November 2012 (but to include 3 Dec)
4.0	3 January 2013	For December 2012 monthly report.

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[14] This deliverable put back due to deployment problems: see risk 9.