# PROJECT: ADVANCING SHAREPOINT IN APL / STAGE 1 - INITIATION

Project Initiation Document


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# Document history

### Revisions

| Version | Status | Date | Changes |
|---|---|---|---|
| 0.1 | Draft | 09/02/2009 | No changes |
| 0.2 | Draft | 10/02/2009 | Added Background, Definition, Organization Structure |
| 0.3 | Draft | 11/02/2009 | Added Controls, Business Case, Communication Plan, Project Quality Plan, Initial Project Plan, Initial Risk Log |
| 0.4 | Draft | 12/02/2009 | Updated all chapters with additional information |
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| 0.7 | Draft | 19/02/2009 | Updated all chapters with additional information |
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### Approvals

This document requires the following approvals:

| Version | Date of approval | Name | Job title | Signature |
|---|---|---|---|---|
| 1.1 | 21/02/2009 | Fritz Ekløff | Project Executive (APL) | Fritz Ekløff |
| | 21/02/2009 | Jan Baljé | Project Assurance (Hanze University) | Jan Baljé |

### Distribution

This document was sent to:

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| 1.1 | 24/02/2009 | Fritz Ekløff | Project Executive (APL) |
| | 24/02/2009 | Jan Baljé | Project Assurance (Hanze University) |
| | 24/02/2009 | Jack Schilder | Internship Coordinator (Hanze University) |
| | 24/02/2009 | Anne Ma Stokke Olsen | Project Support (APL) |

# Management Summary

### Purpose of this document

The goal of this document is:

- To define the project,
- To serve as its management basis and
- To enable the assessment of the project's success.

The two main reasons for the use of this document are:

- To ensure a sound project basis before the Project Board is asked to commit to the project;
- To serve as an underlying document on the basis of which the Project Board can monitor and review progress and changes. It also enables them, during the project, to assess any questions regarding the project's validity.

### Background

Advanced Production and Loading (APL) is a Norwegian company that develops technology for the storage and transport of oil and gas by ships. Together with BW Offshore, who bought APL in 2007, they have over 800 employees, with many offices around the world.

APL wants to standardize to a Microsoft platform. For managing their business processes, they use Microsoft SharePoint. Many of their applications have been migrated to this platform. However, Subcontractors, a Lotus Notes based application for managing third parties that are hired during projects, is not yet migrated. This project will include the migration of this application to SharePoint.

Besides this migration, APL and BW Offshore are both interested in the replication of SharePoint data. APL wants to synchronize SharePoint between some of their offices. BW Offshore will be using SharePoint in the future, and therefore needs a solution for replicating data between their main office and vessels. A research will be done during this project to look for the best solution of data replication between SharePoint systems in different infrastructures.

### General approach

In the first weeks, both SharePoint and Subcontractors has to be mastered. This Project Initiation Document should also be created. After that has been finished, the establishment of the new SharePoint site can start. This includes all steps of a typical development process. Finally, there is time for the research about SharePoint replication, and then the project can come to a controlled end.

The description above can be translated into the following project stages:

| ID | Stage | Days |
|---|---|---|
| 1 | Project Initiation | 12 |
| 2 | Establishing SharePoint Site | 48 |
| 2.1 | Software Requirements Specification and Design | 13 |
| 2.2 | Construction and Coding | 15 |
| 2.3 | Migration, Testing and Debugging | 11 |
| 2.4 | Training Materials | 4 |
| 2.5 | Deployment | 5 |
| 3 | Research SharePoint Replication | 20 |
| 4 | Project Closure | 15 |

### Overall cost and duration

The project costs are estimated to be around 10.000 EUR. The duration of the project is 19 weeks (95 working days), excluding the last week in which a presentation at the Hanze University will be given.

# Contents

# 1 Introduction

This chapter describes the purpose and the composition of this document.

## 1.1 Purpose of this document

This document is written to capture all the project's relevant basic information and principles in order to manage it in a right way. Its goal is to define the project, serve as a basis for its management and to enable the assessment of the project's success.

This Project Initiation Document (or PID) covers the following fundamental project aspects:

- What is the aim of the project?
- Why is it important to achieve these goals?
- Who are involved in the project management and what are their roles and responsibilities?
- How and when will the measures discussed in this PID be realized?

The document is used:

- To ensure a sound project basis before the Project Executive is asked to commit itself to the project;
- To serve as an underlying document on the basis of which the Project Executive and the Project Manager can monitor and review progress and changes. It also enables them, during the project, to assess any questions regarding the project's validity.

## 1.2 Composition of the document

This Project Initiation Document is segmented into two sections as to indicate which parts will be updated and hence will have newer versions as the project proceeds: a static part and a dynamic part:

The "static" part consists of the following chapters and appendices:

- Background (Chapter 2)
- Project Definition (Chapter 3)
- Project Organisation Structure (Chapter 4)
- Project Controls (Chapter 5)
- Communication Plan (Appendix A)
- Project Quality Plan (Appendix B)

The "dynamic" part consists of the Appendices:

- Initial Business Case (Appendix C)
- Initial Project Plan (Appendix D)
- Initial Risk Log (Appendix E)

# 2 Background

Advanced Production and Loading (APL) was founded in 1993. It is a Norwegian company that develops, fabricates and sells advanced systems for offshore production, specializing in storage and transport of oil and gas by ships. In May 2007, APL was bought by the Norwegian company BW Offshore. Together they have over 800 employees, with offices in Norway, Singapore, France, America, Malaysia, Mexico, Shanghai, Brazil and Scotland.

APL has its own IT department in Arendal, Norway. Their philosophy concerning IT is to standardize to a Microsoft platform. To manage and automate business processes, they make use of Microsoft SharePoint. Some examples of what SharePoint is used for, are:

- Managing contacts and relationships;
- Storing documents and mails related to projects;
- Adding new employees to the IT system;
- Registration and approval of travels for employees.

In some projects, APL hires subcontractors. These are third parties that perform a specific task as part of an overall project. A Lotus Notes based application named *Subcontractors* is used to store contact information, visits, audit reports, quality surveillances and more about them. APL is interested in migrating Subcontractors to a SharePoint site. It will better fit their strategy of using one platform.

Each of the APL offices has a fixed Multiprotocol Label Switching (MPLS) line to the main office in Arendal. This allows access to SharePoint in any of the offices. However, to make sure that availability and response times can be guaranteed, APL would like some of their offices to have a local SharePoint server. Data will have to be synchronized between them. APL is interested in how to do this and obtain competence and knowledge in SharePoint replication. So far they had not much luck in implementing such a method.

BW Offshore is also interested in SharePoint replication. Unlike APL, they also operate on vessels worldwide. Because BW Offshore will make use of SharePoint in the future, it will be interesting for them to know how SharePoint data can be replicated from technically difficult locations as vessels. A satellite connection has its disadvantages compared to the MPLS lines used by APL.

The two research questions in this project are:

1. How can the Subcontractors application be migrated to a SharePoint site?
2. What is the best solution for APL and BW Offshore regarding replication of SharePoint data, in different infrastructures such as the vessels from BW Offshore and the offices from APL?

# 3 Project Definition

In the previous chapter the background of the project was described. This chapter will go into more detail and answer some important questions required for laying the foundation for a well-controlled project. For more details, please consult the Initial Business Case (Appendix C).

## 3.1 Project goals

Why does this project have to be realized?
APL began a while ago with the philosophy to mainly use Microsoft products. They started to explore SharePoint and the results were positive. Since then many of their business processes have been integrated into SharePoint. However, Subcontractors, a system for managing third parties that help out in projects, is still making use of Lotus Notes. APL wants this system to be migrated to SharePoint, to fit their philosophy of using one platform.

Another reason is data replication in SharePoint. APL tried several third-party products as iOra and Syntergy to replicate data between their offices around the world, but this was not a big success. APL is interested in the best solution for this issue. The research for finding this solution should not only focus on data replication between APL's offices, but also on the vessels and platforms in use by BW Offshore. In the future they will also make use of SharePoint and it would be good to know in advance how they can implement data replication.

How does the desired situation look like?
The desired situation is to have Subcontractors migrated to SharePoint. The new SharePoint site should have the same functionalities as in the current Lotus Notes application.

At the end of the project data replication for SharePoint should have been well researched. There should be a clear answer on which method APL and BW Offshore should use to synchronize SharePoint data between the different locations and infrastructures.

What benefits will the project bring?
This project will result in a reduction of costs in the long-term. A general rule of thumb is to have as less applications used within a company as possible, without avoiding the functional needs of the business. By undergoing this project, APL will save money in licensing, training and maintenance. See the Initial Business Case (Appendix C) for a cost analysis.

The research for data replication methods in SharePoint will give a clear view for APL on what to do, how much the costs of it will be, and the benefits of the selected method. For BW Offshore the research will hopefully give an argument to also migrate to SharePoint, if it can provide the same data replication functionalities as they currently have.

## 3.2 Selected solution or approach

To get this project to a success, the following steps below have to be followed:

- SharePoint has to be mastered. The books "Inside Microsoft Windows SharePoint Services 3.0", "Inside Microsoft SharePoint Server 2007" and "Programming Microsoft Office Business Applications" from Microsoft Press can be used for this.
- A good understanding of the Subcontractors application is required. Full access to this application is needed to get an insight in all of its functionalities.
- The SharePoint site has to be established. This process includes the creation of requirements, software design, coding, importing of data and testing. After all has been successfully tested, training material has to be created and the system can be implemented.
- Replication of SharePoint data has to be researched.

Please see the Initial Project Plan (Appendix D) for a more detailed overview.

### 3.3 Project scope

The migration of Subcontractors is purely focused on APL. BW Offshore also manages subcontractors, but their approval processes are not as mature as of that from APL. The Project Executive decided that it would not be wise to analyze and change their processes during this project, as it would take a lot of time and is not the biggest priority.

The research of data replication will not include the actual implementation. This is due to limited time and resources. Engineers from APL can study the research material and then take decisions.

### 3.4 Products and/or outcome

The following products have to be delivered:

- This Project Initiation Document (PID). The goal of this document is to define the project, to serve as its management basis and to enable the assessment of the project's success.
- A SharePoint site that replaces the current Subcontractors application.
- A solution (research document) to the data replication method in SharePoint. It should contain good arguments as for why the selected solution was chosen. The research results will be part of the end report, described below.
- An end report and presentation. The report will form the grading base from the Hanze University and can be used by APL / BW Offshore as a reference document for in the future.

Please see the Initial Project Plan (Appendix D) for a Product Breakdown Structure.

### 3.5 Constraints

| Available budget | Desired delivery dates | Available Duration |
|---|---|---|
| 10.000 EUR | Monday<br>1st of June, 2009 | 19 weeks<br>(95 working days) |

### 3.6 Dependencies

This project is dependant on the current SharePoint system installed by APL. This system already includes many data entities, such as customers, employees and projects. The project is also dependant on the commitment of APL and Hanze University.

### 3.7 Preconditions

In order to realize the project, there are a few prerequisites that have to be fulfilled:

- Study materials (such as books) should be made available for learning SharePoint.
- This PID has to be approved by the Project Executive (Fritz Ekløff) and Hanze University. The project should be given a "go".
- A local test environment should be made available. It is a bad practice to develop and test in a live environment. The test environment should have the same data entities as in the live environment, in order to make data relationships.
- There should be licenses for Windows Server 2003, Office SharePoint Server 2007 (MOSS) and Visual Studio.
- Full access has to be given to the Subcontractors application.

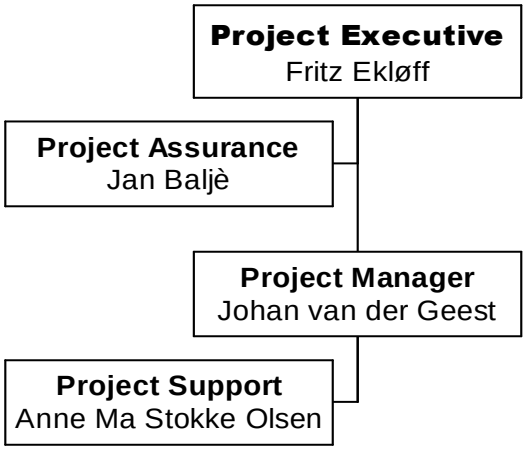
### 3.8 Assumptions

The following assumptions have been made:

- SharePoint is the best solution to go for. APL already uses it for many of their activities. Switching to another system would result in lots of extra work and issues with licensing.
- The SharePoint system that is currently in use by APL has been set up correctly. The new Subcontractors site will take part of this SharePoint farm.

# 4 Project Organization Structure

The organization structure of the project can be seen in the figure below. Detailed descriptions of the roles are described in the upcoming paragraphs.




## 4.1 Executive

The Executive is ultimately responsible for the project. The Executive is responsible for overall business assurance of the project, i.e. that it remains on target to deliver products that will achieve the expected business benefits, and the project will complete within its agreed tolerances for budget and schedule.

## 4.2 Project Assurance

Project Assurance does not have a formal role or responsibility in the project. It can however be used by the Project Manager and Executive to ask for feedback regarding the project. This can be feedback about the deliverable documents (the PID and end report) or the project itself.

## 4.3 Project Manager

The Project Manager has the authority to run the project on a day-to-day basis on behalf of the Project Board within the constraints laid down by the board.

The Project Manager's prime responsibility is to ensure that the project produces the required products, to the required standard of quality and within the specified constraints of time and cost. The Project Manager is also responsible for the project producing a result that is capable of achieving the benefits defined in the Business Case.

## 4.4 Project Support

Project Support is driven by the needs of the individual project and Project Manager. Project Support has a good understanding of the SharePoint system and could sometimes be asked for help if necessary.

# 5 Project Controls

This chapter describes the responsibilities, tolerances and procedures of all the parties involved in this project. It should be pointed out that Project Assurance does not have a formal role or responsibility in this project.

## 5.1 Reports

Who reports to whom and when? See also the Communication Plan (Appendix A).

| Party: / Report: | Project Executive | Project Assurance | Project Manager | Project Support |
|---|---|---|---|---|
| **Project Initiation Document (PID)** | C + A | C + A | W + D | C + I |
| **Preliminary end report** | C + I | C + A | W + D | C + I |
| **End report** | C + I | R + A | W + D | C + I |
| **End presentation** | C + I | R + A | W + D | I |
| **Exception plan** | C + A | C + A | W + D | C + I |

**Legend:**

| | | | | | |
|---|---|---|---|---|---|
| **W** | Write | **C** | Consult | **I** | Received for information |
| **R** | Review | **D** | Distribute/archive | **A** | Approval |

## 5.2 Progress checks

How and with what frequency is progress monitored?

| Consultation | Present | Frequency | Times | Goal | Subjects |
|---|---|---|---|---|---|
| **Project Team Meeting** | Fritz Ekløff<br>Johan v/d Geest | 1 x per week | Variable | Discuss project | Progress, Open Issues, Risks |
| **University Meeting** | Jan Baljé<br>Johan v/d Geest<br>(Fritz Ekløff) | Variable | Variable | Discuss project | Progress, Open Issues, Risks |

## 5.3 Tolerances

The project should be closed before its deadline, the 19th of June, 2009. The Hanze University allows in certain circumstances an additional two months for the project. This should however be avoided. For a detailed overview of all stages and deadlines, see Appendix D (Initial Project Plan).

## 5.4 Risk management

Risks should be discussed as soon as possible with the Project Executive (Fritz Ekløff). If the risk can not be solved right away, Hanze University should be contacted. To prevent risks, an Initial Risk Log has been created (see Appendix E). It contains a lists with risks that could become real during the project and countermeasures to prevent them.

## 5.5 Deviation and exception procedures

When it can be foreseen that there is too much time spend on a stage, an exception procedure should be started. This procedure includes the creation of an Exception Plan, where is discussed how to solve the problem and go on with the next stage. This Exception Plan has to be approved by the Project Executive and Project Assurance, as can be seen in paragraph 5.1 of this document.

# Appendix A: Communication Plan

The Communication Plan mentions all stakeholders with an interest in this project and the way in which they will be involved plus the means of communication that will be used.

### Interested parties in the project

The table below shows the different parties in the project, their roles and means of communication.

| Who | On behalf of | Interest | Means of communication |
|---|---|---|---|
| Johan van der Geest | Hanze University | Project Manager | Consult, decide, execute |
| Fritz Ekløff | APL | Project Executive | Inform, accept, decide |
| Jan Baljé | Hanze University | Project Assurance | Advice, decide |
| Jack Schilder | Hanze University | Project Assurance | Advice, decide |
| Anne Ma Stokke Olsen | APL | Project Support | Advice, inform |

### Communication routes

The table below shows the type of information that is shared between the parties, the communication media that is used and on which frequency.

| From | To | Information | Medium | Frequency of data |
|---|---|---|---|---|
| Johan van der Geest | Jan Baljé | Project updates | E-mail, phone | Variable |
| Johan van der Geest | Fritz Ekløff | Project updates | Direct, e-mail | At least once a week |
| Johan van der Geest | Anne Ma Stokke Olsen | Project updates, support | Direct, e-mail | Variable |

# Appendix B: Project Quality Plan

The goal of the Project Quality Plan is to define the quality techniques and standards applied in the project and also to define the responsibilities to obtain the required quality levels. More requirements will be given in the Software Requirements Specification (SRS) document during stage 2.1.

### Acceptance criteria

The use of Key Performance Indicators (KPI's) will provide the project with objective criteria against which it can be measured. The following KPI's have been defined for this project:

- The end products should be delivered before the deadline, which is the 1st of June, 2009. This allows the project to come to a controlled end until the 19th of June, 2009. The products are described in the Initial Project Plan (Appendix D of this document).
- The first deliverable should be a new SharePoint site that offers the same (or extended) functionality as in the current situation. It should be possible for APL to manage subcontractors in an easy, user-friendly, and streamlined way. The second deliverable is a research document (which will take part of the end report). The research document should contain a clear and objective description of the best approach on how to synchronize data between SharePoint systems, in different infrastructures such as office-to-office in APL and vessels-to-main office in BW Offshore.
- There is going to be a User Acceptance Test (UAT) at the end of the development cycle. Each test consists of stories to be 'played' in the new system, and can either pass or fail. The UAT's will be created by the Project Manager and have to be approved by the Project Executive. At least three key users (users that have good experience with Subcontractor) have to take part of the UAT's. The product can only be delivered if all of the tests pass.
- Although there is training required for the users of Subcontractor, it should not take longer than one full working day for each user to get to know the new system in such a way that they can use it on a daily base without any additional support (on where to find things, how a certain functionality works, etc.). The training documents should be in easy-readable English. APL could decide to translate them to Norwegian on their own.
- There are no internal Service Level Agreements, which makes it hard to use availability percentages. However, the new SharePoint system should be a stable product whereas the availability should not be dependent on the quality (e.g. bugs) of the SharePoint site to be developed.
- The SharePoint site has to be reliable and the input of data should be accurate. In other words, data integrity has to be guaranteed. This does not only apply to the migration of data from the old system to the new, it also applies during the creation of new data in SharePoint during the entire life-cycle of the application.
- The SharePoint site has to be secure. Only users that require the application should be given access. There should be separate permission levels, such as normal users (managing subcontractors) and administrators (managing who has access to the application).
- The overall costs of the project may not exceed that of the project budget of 10.000 EUR. This only applies to the development of the SharePoint site and the overall costs of the consultant. The data replication research has a separate budgeting (in the terms of the outcome of the result, not the actual research itself).
- At the end, an end report has to be delivered. All quality documents that were created during the project (such as requirements, designs, testing documents, training materials) will have to be attached to this document. The quality of this end report has to be on a professional level, such as can be expected from a student graduating at university level.

### Responsibilities regarding quality

It is the ultimate responsibility of the Project Manager (Johan van der Geest) to make sure the system to be developed meets the requirements specified in this document and the requirements and specifications of the new SharePoint system that will be further defined during stage 2.1.

# Appendix C: Initial Business Case

The Bussines Case contains the considerations to start the current project. It forms the justification of the project and because of that, it will be judged by the Project Executive. The foundations of the project will be frequently evaluated on the basis of this Business Case.

### Reasons for this project

The following reasons formed the trigger for starting this project:

- APL began a while ago with the philosophy to mainly use Microsoft products. They started to explore SharePoint and the results were positive. Since then many business processes have been integrated into SharePoint, such as archiving mails from Outlook to corresponding project folders in SharePoint. However, Subcontractors, a system currently in use for managing subcontractors, is still making use of the Lotus Notes platform.
- Data replication in SharePoint has been an issue in APL. They have tried several third-party products as iOra and Syntergy to replicate data between the offices of APL around the world, but this was not a big success. They are looking to a solution to this.
- BW Offshore will migrate to SharePoint in the future. They currently use risk management software on vessels. This software synchronizes data to their main servers in Oslo via satellite connections. It would be interesting for them to know how this can be done in a SharePoint environment.

### Alternatives considered

There are no alternatives considered for the migration of Subcontractors. It is APL's wish to only make use of SharePoint as a collaboration and document-management platform. As many of their business processes have already been integrated into SharePoint, it would not be wise to go for another solution or to not do the migration.

### Benefits

By undertaking this project, the following benefits will be achieved:

- It will be a reduction of costs in the long-term. A general rule of thumb is to have as less applications used within a company as possible, without avoiding the functional needs of the business. By undergoing this project, APL will save money in Lotus Notes licensing and maintenance. An estimated calculation of the *yearly* profit is given below:

| Removal | Profit |
|---|---|
| Lotus Notes Common Platform<br>(250 EMPLOYEES * 700 NOK * 0,10 HOURS/DAY * 220 DAYS/YEAR) | 770.000 NOK |
| Lotus Notes maintenance<br>(50 HOURS * 700 NOK/HOUR) | 35.000 NOK |
| **Total** | **805.000 NOK** |

- Data will get stored in one, central place. In APL's SharePoint system there is already a list with companies and contact information. Currently, this data is also stored in the Lotus Notes database and is therefore redundant.
- The process of evaluating a subcontractor contains several (approval) steps. In SharePoint there is the possibility to make use of the Windows Workflow Foundation to create reactive programs. The current Lotus Notes application is very limited in this.
- SharePoint offers a better integration with the Active Directory in Windows Server products. Single sign-on (SSO) is used to allow users to directly login into SharePoint without entering their login credentials.

- SharePoint has a better integration with other Microsoft products. It is very easy to export data to Microsoft Access or Excel. There is also a possibility to use InfoPath for creating customized forms, either web based (within SharePoint) or by using the InfoPath application.
- There are more 'awareness' features in SharePoint. Users can subscribe to RSS feeds or receive automated alerts by mail when something changes.
- APL and BW Offshore will get a better understanding on how to replicate data in SharePoint. If a good method can be found, then availability will remain in case a connection goes down, and there will be an increase in response times (less than 10 milliseconds for each HTTP request, instead of 250 – 300 milliseconds as it now is between for example Arendal and Singapore).

### Risks

The following risks could occur during the project:

- The consultant (Johan van der Geest) will get ill for a longer period.
- There is going to be a delay in the project planning.
- APL or Hanze University will have no longer trust in the project.
- The new SharePoint system will not be accepted during the User Acceptance Test.
- Learning SharePoint will take too much time.
- Too much focus is put on less important project parts.

For more risks and detailed information, please see the Initial Risk Log (Appendix E).

### Costs

Since APL already has the licenses for SharePoint, there are no additional costs in this. The server farm of APL is large enough to support one additional site. It is unknown how much a data replication solution for SharePoint would cost. If it will be a homemade solution, the costs are low. A third-party tool could result in extra licensing costs.

There will be one consultant (Johan van der Geest) working on the project. The hour rate for the consultant is 125 NOK. This brings the total project costs to approximately: 95 WORKING DAYS * 7.5 HOURS * 125 NOK = 85.000 NOK.

The costs for training the users about the new SharePoint application are not included in the project budget. However, for each employee it will be around: 4 HOURS * 700 NOK = 2.800 NOK. Depending on how many employees APL will train, the costs will be:

| Employees | Training Costs |
|---|---|
| 5 | 14.000 NOK |
| 10 | 28.000 NOK |
| 15 | 42.000 NOK |
| 20 | 56.000 NOK |
| 25 | 70.000 NOK |

### Time

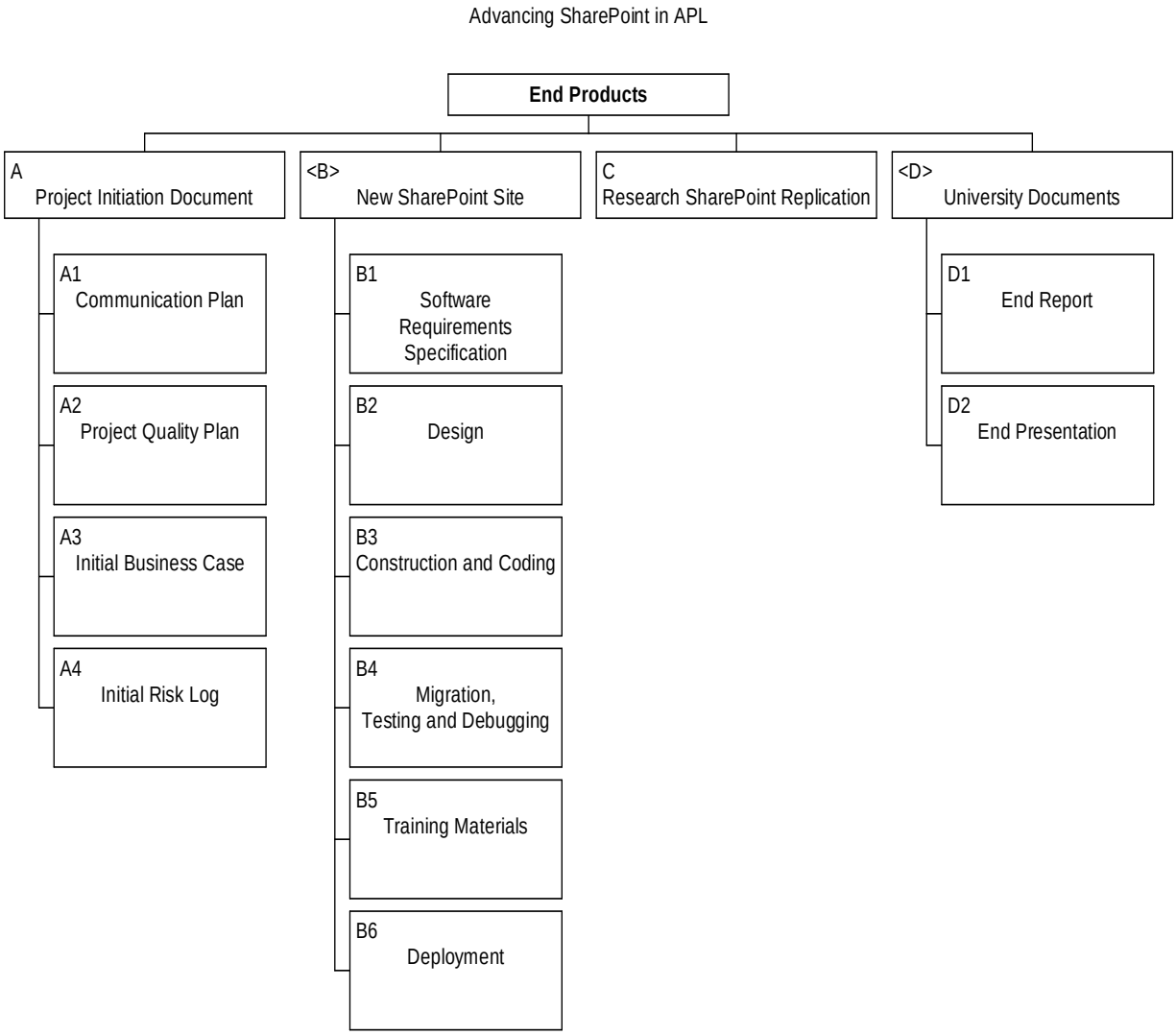
The duration of the project is 19 weeks (95 working days), excluding the last week in which a presentation at the Hanze University will be given.

# Appendix D: Initial Project Plan

The Initial Project Plan is a high-level plan showing the major products of the project and when they will be delivered. It is a major control document for the Project Executive and Project Assurance to measure actual progress against expectations.

### Product Breakdown Structure (PBS)

The Product Breakdown Structure below shows a hierarchy of all the products to be produced.



### Overview of stages

In the table below you find a detailed description of the stages in this project. It contains the stage names, descriptions, start dates end deadlines. Please note that not all stages deliver a product.

| Stage ID | Product ID | Name / description | Start | Deadline* |
|---|---|---|---|---|
| **0** | **D1** | **End Report**<br>Final documentation for the Hanze University and APL. This document plays a big role in the grading of the project. It will be updated and worked on throughout the entire project. | 16/02/09 | 01/06/09<br>(75 days) |
| **1** | **A** | **Project Initiation Document**<br>A logical document that brings together the key information needed to start the project on a sound basis and to convey that information to all concerned with the project. | 09/02/09 | 24/02/09<br>(12 days) |
| | **A1** | **Communication Plan**<br>Part of the Project Initiation Document describing how the project's stakeholders and interested parties will be kept informed during the project. | | |
| | **A2** | **Project Quality Plan**<br>The Project Quality Plan is part of the Project Initiation Document. Its goal is to define the quality techniques and standards applied in the project and also to define the responsibilities to obtain the required quality levels. | | |
| | **A3** | **Initial Business Case**<br>Information that describes the justification for setting up and continuing this project. It provides the reasons (and answers the question 'Why?') for the project. | | |
| | **A4** | **Initial Risk Log**<br>A document that provides identification and countermeasures for all risks to the project. It is created at the start-up and developed during the life of the project. | | |
| | | **Mastering SharePoint**<br>The Microsoft SharePoint system has to be mastered. Although this does not deliver any products, it is very important to have knowledge of the system before development is started. The books "Inside Microsoft Windows SharePoint Services 3.0", "Inside Microsoft Office SharePoint Server 2007" and "Programming Microsoft Office Business Applications" and the internet can be used to gain experience. | | |
| | | **Getting insight into Subcontractors**<br>It is important to get an insight in how the current product is used. The functionalities and user interface should be examined before the development of a new SharePoint solution can be started. | | |
| **2.1** | **B1** | **Software Requirements Specifications (SRS)**<br>A complete description of the behavior of the system will be made in this stage. It includes functional and non-functional requirements. | 25/02/09 | 13/03/09<br>(13 days) |
| | **B2** | **Design**<br>In this stage an architectural view of the system will be made. Unified Modeling Language (UML) can be used for this. | | |

| | | | | |
|---|---|---|---|---|
| **2.2** | **B3** | **Construction and Coding**<br>In the construction stage the SharePoint site is being created. It should meet the requirements and design made in the previous stage. The waterfall method (i.e. going back to stage 2.1 if something fails) won't be used, but there should not be too many changes. | 16/03/09 | 03/04/09<br>(15 days) |
| **2.3** | **B4** | **Migration, Testing and Debugging**<br>After the system is finished, data should be migrated from the Lotus Notes database. It should also be tested and debugged. Not only should critical bugs be fixed, there should also be an User Acceptance Test (UAT) to find out if the SharePoint system meets the agreed-upon requirements. | 06/04/09 | 20/04/09<br>(11 days) |
| **2.4** | **B5** | **Training Materials**<br>The users of Subcontractors are used to work within a Lotus Notes environment. Although they already might have some experience with SharePoint, it is important to have training materials (in the form of a User Manual and presentation). These materials can be used for the current users, but also for new employees that will work with the system. | 21/04/09 | 24/04/09<br>(4 days) |
| **2.5** | **B6** | **Deployment**<br>The deployment of the new SharePoint site is the set all of the activities that make the system available for use. This can only been done after it has been well tested in stage 2.3. It depends on APL's Change and Release Management if the deployment of the SharePoint site can be done within the given timeframe. | 27/04/09 | 01/05/09<br>(5 days) |
| **3** | **C** | **Research SharePoint Replication**<br>The last part of the project consists of a research in the replication of SharePoint data. APL and BW Offshore are interested in the possibilities of synchronizing data between offices and vessels. The research document will be part of the end report. | 04/05/09 | 29/05/09<br>(20 days) |
| **4** | | **Project Closure**<br>Every project should come to a controlled completion. This stage checks if all required products have been delivered and accepted and recommends closure of the project to the Project Executive. | 01/06/09 | 19/06/09<br>(15 days) |
| | **D2** | **End Presentation**<br>A final presentation will be given at the Hanze University between the 22nd and 26th of June. | | |

*** Deadline**: during the project the deadlines might change. This should be done through the creation of an exception plan, as mentioned in paragraph 5.6 of this document.

# Appendix E: Initial Risk Log

The Initial Risk Log contains a table with the initial risks of this project. As part of the preparation for a new stage, the Project Manager can update the Risk Log with any additions.

| ID | Description | Probability | Impact | Countermeasure(s) |
|---|---|---|---|---|
| **1** | Johan van der Geest gets ill for a longer period (two weeks or more during the 19 weeks). | L | H | Illness is hard to prevent, but try to have a healthy work environment. |
| **2** | There is going to be a delay in the planning of the project. | M | H | Stay as much focused on the project planning as possible. Raise an exception when there is a risk. |
| **3** | Project plans are abandoned under pressure, resulting in chaotic, inefficient development. | M | H | Whenever it can be foreseen that the Project Plan is unrealistic, raise an exception plan and come with a solution. |
| **4** | Too much focus is put on less important project parts. | L | M | Follow the Quality Plan and adjust focus when necessary. |
| **5** | There will be insufficient communication with the Hanze University or Project Executive. | L | M | Make use of the Communication Plan. When there is no response by mail, try to contact directly by phone. |
| **6** | Insufficient resources are available (software, testing environment, …). | L | H | Contact the Project Executive in advance and request for the required resources. |
| **7** | APL or Hanze University has no longer trust or commitment in the project. | L | H | Have an ongoing communication and make sure the Business Case always stays valid. |
| **8** | Learning SharePoint takes too much time. | L | M | Make full use of the available resources. Eventually take the books home and study during 'free time'. |
| **9** | Use of unfamiliar methodology (SharePoint) results in extra training time and in rework to fix first-time misuses. | M | M | Learn the product from the beginning. Do not start making the requirements and design before you have a good understanding of the product. |
| **10** | The new SharePoint system is not accepted by the users during the User Acceptance Test (UAT). | M | H | Put much focus on the requirement analysis and have an ongoing dialogue with the end users. |
| **11** | Data migration takes too much time or fails at one point. | M | H | Carefully explore the data, develop a method for migrating it, and check if the data is the same in both systems. |
| **12** | Moving from the testing environment to the live environment causes extra or unexpected problems. | M | M | Make sure the testing environment has the exact same configuration as the live environment. |
| **13** | The customer insists on new requirements during the project. | M | H | Design the requirements in an early stage of the project, and make sure all stakeholders get to see them. Make clear that changing them during a project causes delays, and should therefore be avoided. |

**Legend:**

| | |
|---|---|
| **L** | Low |
| **M** | Medium |
| **H** | High |