# Mini-Project 9: Mid-Size IT Project

## Mini-Project Overview

**Time Estimate: 2 hours 30 minutes**

## Project Submission Steps

You work for a mid-size electronics company called Globex. The environment is based on Microsoft Windows with Active Directory and Exchange. Currently, all of the desktops are running Windows 7, and the servers are running Windows Server 2016. Management has been wanting to upgrade these systems for a long time, and with the increased revenues from their new products, they are now able to make a substantial investment in IT infrastructure. Windows 7 reached End Of Life (EOL) on January 14, 2020, so they want to upgrade them all to Windows 10.

Despite upper management support, there are some line managers who are not IT-savvy and really don't see the purpose in upgrading. They've been using Windows 7 for years and they see no reason to move to something new. They also don't want to have to spend time learning the new OS and having their existing applications break.

At management's request, you contracted with an outside consulting firm to come in and perform a feasibility study. After a few weeks gaining an understanding of the

environment, the user base, applications in use, hardware deployed, and so on, they put together a slide deck showing what they found and what they recommend.

After seeing the presentation, the CIO and his lieutenants have signed off on the plan. It now needs to go to the Project Management Office (PMO). A project management office is a group or department within a business, government agency, or enterprise that defines and maintains standards for project management within the organization. The PMO strives to standardize and introduce economies of repetition in the execution of projects.

In order for this project to be officially accepted by the PMO for final review and approval, it must conform to the PMO's documentation standards.

Your task is to take the slide deck that the consultants gave you and put that information into the below-provided Figure 1, 'Mid-Size IT Project Template'. Feel free to use extra pages to cut and paste exhibits if necessary. Also, be sure to capture the key portions of the project so everyone will fully understand what the project will entail.

For example, slide 4 is basically your scope. Use the cost per PC on slide 6 and the hardware count on slide 8 (2400 - 2800) to determine approximate cost. Finally, Slide 12 contains the information needed to build out the Detailed project Schedule in Addendum 1.

Finally, add a 'Glossary of Terms' at the end with key terms and their definitions. Assume that the readers are not "IT people" as you do this. Use figure 2, 'Filled-out Mid-Size IT Project Template ' that follows the empty template to help guide you, if needed.

Some of the information being asked for may not be contained in the provided artifacts. That is by design. The purpose is to teach you to take the initiative by leveraging online resources to fill in the gaps.  Remember, providing perfectly accurate figures is not as important as understanding the general structure of IT project management. Don't spend too much time calculating specific costs or deadlines; just try to make it as realistic as possible

**Figure 1**. Mid-Size IT Project Template

## Mid-Size IT Project Scope Form

| | |
|---|---|
| **Project Title:** | **SR Number:** 813430 |
| **Project Leader/Manager:** Rashawn Hill | **Anticipated Project Start Date:** 6/15/2019 |
| **Sponsor:** Jane Doe | **Date Prepared:** 5/30/2019 |
| **Project Type:** Mid-Size | **Estimated Completion Date:** 10/1/2019 |

**Purpose of Project:**

Globex environment is based on Microsoft Windows with Active Directory and Exchange. Currently, all of the desktops are running Windows 7, and the servers are running Windows Server 2016. Management has been wanting to upgrade these systems for a long time, and with the increased revenues from their new products, they are now able to make a substantial investment in IT infrastructure. Windows 7 reached End Of Life (EOL) on January 14, 2020, so they want to upgrade them all to Windows 10.

**Project Scope:**

Provide a standardized Windows 10 image that is robust, secure, and swift for all the business needs.

Provide an automated and rationalized approach to managing Desktops through SCCM infrastructure for OS deployment, Application Deployment reduces manual labor in the deployment and WAAS support.

Adhere to a standardized LifeCycle for maintaining Windows 10 As A Service (WAAS) specifically for the Application, Operating System (OS), and Hardware to reduce manual labor and compatibility errors.

**Team Members:**

Core project team members:

| Team Member | Unit | Role |
|---|---|---|
| Rashawn Hill | IT | Project Manager & implementation lead |
| TBD | Selected vendor | Implementation and support |
| Jane Doe | IT | System, database or other functions as needed |
| John Doe | IT | Product selection, testing & validation sign-off |
| | | |

**Assumptions:**

- Deploy Windows 10 by January 2020
- Deploy Windows 10 as Unified Productivity & Application Platform for the business

**High Level Timeline:**

Key Milestones

| | Duration | Start | Finish |
|---|---|---|---|
| Requirements & Planning (Product evaluation and selection) | 13 days | 5/30/2019 | 6/7/2019 |
| Obtain approvals from Leadership | <1 day | 6/7/2019 | 6/7/2019 |
| Procure selected software | 7 days | 6/8/2019 | 6/16/2019 |
| Prototype – Installation, configuration & testing | 45 days | 6/19/2019 | 8/18/2019 |
| User Training and UAT | 15 days | 8/21/2019 | 9/8/2019 |
| Production – Installation, configuration & testing | 15 days | 9/11/2019 | 9/24/2019 |
| Go-Live | <1 day | 10/2/2019 | 10/2/2019 |
| | | | |
| | | | |

**Costs: (Phase1)**

Cost to upgrade each pc = $445
Hardware count = 2400 - 2800
400 are compatible
Cost = $178,000

**Approvals:**

**VP** **Jhene Aiko** **Date 11/2/2021**

| | | |
|---|---|---|
| **CIO** | **Beyonce** | **Date 11/2/2021** |

Addendums:

# Addendum 1 – Detailed Project Schedule

| | | | | |
|---|---|---|---|---|
| **1** | **Parts Planning & Scheduling -Phase 1** | **97 days** | **Fri 5/19/20** | **Mon 10/2/20** |
| **1.1** | **CRP/Requirements / Planning** | **14 days** | **Fri 5/19/20** | **Wed 6/7/20** |
| 1.1.1 | Documentation - Scope / Requirements | 1 day | Fri 5/19/20 | Fri 5/19/20 |
| 1.1.2 | Software Evaluation & Selection | 12 days | Mon 5/22/20 | Tue 6/6/20 |
| 1.1.3 | Approvals | 0 days | Wed 6/7/20 | Wed 6/7/20 |
| 1.2 | Procure Selected Software | 7 days | Thu 6/8/20 | Fri 6/16/20 |
| **1.3** | **Prototype Installation, Configuration & Testing** | **45 days** | **Mon 6/19/20** | **Fri 8/18/20** |
| **1.3.1** | **Data Collection** | **5 days** | **Mon 6/19/20** | **Fri 6/23/20** |
| 1.3.1.1 | User List & Security Roles | 5 days | Mon 6/19/20 | Fri 6/23/20 |
| 1.3.1.2 | Resources | 5 days | Mon 6/19/20 | Fri 6/23/20 |
| 1.3.1.3 | Work Orders | 5 days | Mon 6/19/20 | Fri 6/23/20 |
| 1.3.1.4 | Transfer Orders/Forecast | 5 days | Mon 6/19/20 | Fri 6/23/20 |
| 1.3.1.5 | Sites (warehouses) | 5 days | Mon 6/19/20 | Fri 6/23/20 |
| **1.3.2** | **Installation & Configuration** | **15 days** | **Mon 6/26/20** | **Fri 7/14/20** |
| 1.3.3 | Integration | 15 days | Mon 7/17/20 | Fri 8/4/20 |

| | | | | |
|---|---|---|---|---|
| 1.3.4 | Testing | 10 days | Mon 8/7/20 | Fri 8/18/20 |
| 1.4 | User Training | 5 days | Mon 8/21/20 | Fri 8/25/20 |
| 1.5 | User Acceptance Testing | 10 days | Mon 8/28/20 | Fri 9/8/20 |
| **1.6** | **Production Installation, Configuration & Testing** | **15 days** | **Mon 9/11/20** | **Fri 9/29/20** |
| 1.6.1 | Installation & Configuration | 10 days | Mon 9/11/20 | Fri 9/22/20 |
| 1.6.2 | Validation | 5 days | Mon 9/25/20 | Fri 9/29/20 |
| **1.7** | **Go-Live** | **1 day** | **Fri 9/29/20** | **Mon 10/2/20** |
| 1.7.1 | Go / No-Go | 0 days | Fri 9/29/20 | Fri 9/29/20 |
| 1.7.2 | Go-Live | 1 day | Mon 10/2/20 | Mon 10/2/20 |

# Addendum 2 –Requirements Gathering

**Figure 2**. Filled-out Mid-Size IT Project Template

| **Mid-Size IT Project Scope Form** | |
|---|---|
| **Project Title:** Parts Planning & Scheduling | **CR Number:** CR792345 |
| **Project Leader/Manager:** Betty Davis | **Anticipated Project Start Date:** 6/15/2020 |
| **Sponsor:** John Smith | **Date Prepared:** 5/30/2020 |
| **Project Type:** Mid-Size | **Estimated Completion Date:** 10/1/2020 |
| **Purpose of Project:**<br>Globex Parts has three manufacturing facilities and needs the ability to manage shop floor activity and inventory. This project is intended to identify and implement planning and scheduling functionality that will generate finite capacity scheduling using multiple constraints along with materials management capability. The desired result is more efficient production schedules, better ability to meet customer demand by optimizing available resources, reduce inventory on hand and reduce production lag due to procurement lead times. | |
| **Project Scope:**<br>The scope of this project is to select and implement a third-party advanced planning & scheduling (APS) product including an integration between the selected product and SAP R/3. | |

The selected vendor will provide the software, installation and configuration assistance, end user training and support.

This will be a phased project: Colorado Location will be Phase 1. Texas and Florida will be scheduled later for additional phases. The cost and timeline mentioned in this project plan is limited to just Phase1 (Colorado).

**Team Members:**

Core project team members:

| Team Member | Unit | Role |
|---|---|---|
| Betty Davis | IT | Project Manager & implementation lead |
| John Smith | CO Facility | Product selection, functional lead |
| Steve Austin | CO Facility | Product selection, testing & validation sign-off |
| TBD | Selected vendor | Implementation and support |
| TBD | IT | System, database or other functions as needed |

**Assumptions:**

- Initial product selection targeted for June 7, 2020
- No system downtime anticipated for users
- Users from each facility must be available for testing and training
- Timeline depends on the readiness of the operating location: user availability, data scrubbing, etc.
    - Delays in resource availability and/or data readiness will affect the timeline
- Proposed timeline and key milestones are for Phase 1 to include CO location only
    - Texas and Florida are not addressed in Phase 1 and will be scheduled for later phases
- Reports from the selected product must be configurable and/or be managed through a reporting tool to allow for modified and custom reports
- Custom/modified reporting required for go-live may impact timeframe
- Anything not explicitly stated in the project scope will be out of scope for this project

**High Level Timeline:**

Key Milestones For Phase 1

| | Duration | Start | Finish |
|---|---|---|---|
| Requirements & Planning (Product evaluation and selection) | 13 days | 5/19/2020 | 6/7/2020 |
| Obtain approvals from Leadership | | 6/7/2020 | 6/7/2020 |
| Procure selected software | 7 days | 6/8/2020 | 6/16/2020 |
| Prototype – Installation, configuration & testing | 45 days | 6/19/2020 | 8/18/2020 |
| User Training and UAT | 15 days | 8/21/2020 | 9/8/2020 |
| Production – Installation, configuration & testing | 15 days | 9/11/2020 | 9/29/2020 |
| Go-Live | | 10/2/2020 | 10/2/2020 |
| | | | |
| | | | |

**Costs: (Phase1)**

The selected vendor and product is: Exeter Manufacturing Software

Estimated costs for Phase 1:

Licensing $50,000
Implementation costs $14,000
Annual support $8,500

**Approvals:**

**John Smith** **Date**

**CIO** **Date**

# Addendum 1 – Detailed Project Schedule

Timeline and project plan for Phase 1

| WBS | Task Name | Duration | Start | Finish |
|---|---|---|---|---|
| **1** | **Parts Planning & Scheduling -Phase 1** | **97 days** | **Fri 5/19/20** | **Mon 10/2/20** |
| **1.1** | **CRP/Requirements / Planning** | **14 days** | **Fri 5/19/20** | **Wed 6/7/20** |
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| 1.7.1 | Go / No-Go | 0 days | Fri 9/29/20 | Fri 9/29/20 |
| 1.7.2 | Go-Live | 1 day | Mon 10/2/20 | Mon 10/2/20 |

# Addendum 2 – Requirements Gathering

Requirements from the Colorado group:

- Finite Capacity Planning
    - Multiple resource constraints
    - Current product only supports infinite capacity
- Materials planning & scheduling based on production schedule
- Capable to Promise to support On Time Delivery
    - Current product can only approximate based on infinite scheduling
- Ability to use Sales Forecast combined with Transfer Order requests to generate demand planning
- Detailed planning and scheduling reports
    - Shop floor schedules for labor and machine
- Independent shop calendars for each facility/location
- Ability to generate multiple What-If scenarios

Desired functionality:

- Ability to generate shipping schedules based on product completion (finished goods receipts)

The Requirements documented with the Colorado group also apply to the additional facilities in consideration for phased implementation.

Proposed Solution:

Current product does not provide the required scheduling functionality; therefore, the recommendation is to select a third party product that will integrate with the current product to utilize existing data and some additional configuration via an export to generate the needed planning and scheduling results.

The following are the proposed steps:

- Review and select appropriate third-party product
- Procure selected product
- Implement product
- Training for end users and support team
- Reporting modifications TBD

The proposed solution would be implemented at the Colorado facility first, then phased in at Texas and Florida. Timing for implementation phases will rely heavily on resource availability at each location as well as the readiness of each facility.

# Addendum 2 continued – Requirements Gathering

Production Comparison Chart:

| Wayne Hammond | Product | | | | |
|---|---|---|---|---|---|
| Requirement | AG | OND | Prator | Exeter | Origal |
| Finite Capacity Planning | No | No | Yes | Yes | Yes |
| Multiple Resource Constraints | No | UK | Yes | Yes | Yes |
| Full BoM explosion for sub components and assemblies | Yes | UK | Yes | Yes | Yes |
| Materials Planning based on production schedule | UK | | Yes* | Yes | Yes* |
| Capable to Promise for OTD | Yes single site | UK | Yes | Yes | Yes |
| Use Sales Forecast & Transfer Orders for demand planning | No | Yes | Forecast Only* | Yes* | No |
| Generate detailed planning & scheduling reports | UK | UK | Yes | Yes | Yes |
| Generate labor and machine schedules | Yes | UK | Yes | Yes | Yes |
| Support multiple shop or resource calendars | No | UK | Yes | Yes | Yes |
| Generate multiple What If scenarios | No | UK | Yes | Yes | Yes |
| Completion/shipping schedule reports | No | UK | Yes | Yes* | Yes |
| | | | | | |

UK=unknown
*=with customization