



Calgary Board of Education

---

# IMS UPGRADE PHASE 1

---

## Project Charter

Project Number:
-----------------

--

<b>Author:</b>	Joan Wilkinson Steve O'Brien	<b>Version</b>	2.20
<b>Phone</b>	403-294-8537 403-861-4058	<b>Date:</b>	July 14, 2009
<b>File:</b>		<b>Status:</b>	Final



**TABLE OF CONTENTS**

**TABLE OF CONTENTS**..... **2**

**PROJECT CHARTER** ..... **3**

    Identification ..... 3

    Executive Summary ..... 3

        Deliverables and Outcomes ..... 3

**Business Case Summary** ..... **4**

        Situational Assessment and Problem Statement..... 5

        Strategic Fit ..... 5

    Project Scope..... 6

    Estimated Schedule and Budget..... 6

        Schedule ..... 7

**Funding Source**..... **9**

    Project Management Approach..... 10

    Project Assumptions or Predecessors ..... 11

    Project Constraints..... 11

    Project Risks ..... 12

        Organizational Impacts ..... 13

        Project Team Organization Plans: ..... 14

**APPROVALS** ..... **16**

**Recommendation:**..... 16

**Approval to Move to Execution (Sign Off):** ..... 16



**PROJECT CHARTER**

**Project Identification**

Project Identification	
Project Name:	IMS Upgrade : Phase 1 (Title of PID: IMS Replacement)
Senior Sponsors:	C. Seibel, IT Director; C. D'Silva, Director Corp Business Services
Working Group:	J. Wilkinson, Manager, Educational Resources and Services G. Tetz, Manager, Purchasing K. Rae, Manager Application Services
Division Functional Director:	C. D'Silva, Director Corp Business Services
Project Manager:	S. O'Brien, Project Manager, Technical Project Office

**Executive Summary**

The purpose of the project is to upgrade the current Integrated Media System (IMS) which is the library management system used in all CBE libraries. The contract for the current IMS, Accent, will expire in February, 2010.

At the beginning of 2009, CBE Purchasing applied for a 6 month extension to the contract but this was declined. Discussions involving Educational Resources and Services, Information Technology Services, Purchasing, and Specialist Evaluation & Selection/PLC led to the recommendation that SirsiDynix Symphony, an upgrade to Accent, be acquired, installed on CBE-owned hardware and supported in-house.

It is anticipated that the project will have 2 phases: the goal of the first phase is to replace the existing functions of the current system and bring the hardware in-house; in the second phase, enhancements to the system will be implemented to address the evolving needs of the Learning Resources Strategy. This document covers the first phase only.



## **Deliverables and Outcomes**

### **Goal of the Project**

The SirsiDynix Symphony system will be acquired and installed at CBE for use in all CBE libraries and the centralized service units that use Accent, the existing IMS solution. The focus will be to replace the existing functionality provided by Accent. It is expected that Accent will be retired from service at the CBE by February 1, 2010.

### **Outcomes**

- All of the functions of the current system, Accent will be able to be replicated in Symphony.
- All data housed in Accent will be secured and migrated into Symphony.
- The acquisitions process at CBE will be reviewed for effectiveness and optimization. The functionality found in Symphony will be used where appropriate.
- Supporting infrastructure (hardware, software, databases, network) will be in-house.
- The support infrastructure will be fully supported by in house staff. The infrastructure will be securely backed up and recoverable based on agreed to service level standards.
- Three interfaces: Oracle Financials, SIRS, and PeopleSoft will be reviewed and analyzed. As per the analysis and specification, they will be developed, tested and made operational with Symphony.
- All stakeholders affected by the change will be provided relevant training and/or orientation.
- The system will be rolled out to all school libraries, library staff, and service units currently using Accent, the existing IMS system.
- Accent will be retired from service at the CBE



---

**Business Case Summary:****Situational Assessment and Problem Statement**

We are in the final year of a 5 year P3 contract. We pay our partners \$354,000 per year in licensing fees, system support, maintenance, and computer storage. There are additional charges for any changes requested by us. CBE has extremely limited access to the servers on which the system is housed. The level of service and support we receive is poor and is deteriorating, in part because the original software operating company has been taken over by another company. The repatriation of the system to CBE will significantly reduce costs and improve service.

**Strategic Fit**

The need to upgrade the IMS system is critical. CBE libraries will be without an operating system when the current contract expires in February, 2010.

Symphony, the upgraded system, is a product of SirsiDynix, worldwide leaders in library software systems.

Symphony's webcat and user interface is more user-friendly than webcats to date. In addition, it has the potential to provide access to a broad range of information resources, both print and digital.

The additional features, which are available for Symphony and which could be acquired in Phase 2 of the project e.g. Enterprise and SchoolRooms, have the potential to meet some of the recommendations of the Learning Resources Strategy.



## Project Scope

Scope Includes
CBE TPO Methodology <i>Approved PID, Project Charter, Project Plan and Quality Assurance, Project Deployment and Closure</i>
Implementation of Symphony Solution Staffweb, Director, e-Library [Webcat]
All existing IMS functionality identified, replaced, tested, trained on, operational:
Cataloguing and Authority System
Circulation
Management
Webcat (Online Public Access Catalogue)
Acquisitions
Interfaces
Interface with Oracle Financials (acquisitions)
Interface with SIRS (students records)
PeopleSoft (staff)
Reports used in Accent will be replaced with equivalent reports in Symphony
Planning, acquisition and deployment of in-house infrastructure (hardware, software, network equipment)
Custom Configuration
Policy Evaluation and Profiling
Configuration and Quality Evaluation
Contract for Services with SirsiDynix: <i>Contract for services</i>
Closure and termination of contract with Fujitsu
Application Services staff FTE recruitment
Data migration and testing
Fully executed test plan with defect resolution <i>Regression, Functionality, and Unit testing</i>
Training of all affected stakeholders ERS, Purchasing, school library staff, Webcat users (student, teachers)
Go live & cutover
Accent IMS services will be retired and de-commissioned
Handover to operational support

## Out of Scope

Unless specifically identified, the scope of this project is limited to the replacement of existing functionality related the Accent and the CBE Library services.



## Milestones

Milestone	Outcome	Target Dates
1. Initiation & Planning P.I.D., Project Charter, Implementation Plan, Schedule & Work Packages	Funding Approval, Project Manager in place, Project ready to begin	July 2009
2. Finalize Contract with SirsiDynix	Statement of Work – commence engagement with SirsiDynix. Contract - Reviewed and signed	October 2009
3. Infrastructure: IT Design review, deployment plan, build TEST, QAC, PROD platforms	Architecture & Deployment logistics detailed out, all platforms built and ready for production.	September 2009
4. Business Requirements and Quality Plan	Pre-Symphony requirements determined	September 2009
5. Migration of Accent data to Symphony	Data from Accent secured, tested, and ready	October 2009
6. Interfaces Functional (as per plan) a. Oracle Financials b. SIRS c. PeopleSoft	Operational Process for each Interface in place	November 2009
7. Quality Sign off on testing in TEST & QAC & PROD	All platforms tested and all defects managed.	December 2009
8. Training a. Finalize training plan b. Complete Training	All required staff and stakeholders trained and/or orientated	December 2009
9. Go Live a. Finalize cutover plan b. Cutover c. Go live d. Warranty support period	Symphony is up and running as per scope definition	January 2010
10. Decommission Accent	CBE has terminated usage of Accent, and contract is closed out.	February 2010
11. Close Out and complete all TPO requirements a. Handover project to Operations b. Complete all status reports, and issue logs c. Complete lessons learned, close out documents.	Support model in place, all requisite documents and processes complete.	March 2010



**Project Budget**

**Over 3 years**

<b>Project Budget</b>	<b>Planning Only Budget</b>	<b>Total Project Estimate</b>
<b>Capital Budget (Costs)</b>		
Equipment	155,000	275,000 (over 3 years)
Consulting/Contract Fees	90,000 (6 mos. Project manager)	90,000
Temporary Salaries & Benefits	10,000	10,000
Materials/Supplies	10,000 (training materials)	10,000
Other		
<b>Total Capital Budget</b>	<b>265, 000</b>	<b>385,000 (over 3 years)</b>
<b>Operating Budget</b>		
<b>Total Operating Budget</b>		<b>270, 000 (1 IT FTE over 3 years)</b>
<b>Total Project Budget</b>		<b>655,000 (over 3 years)</b>



### Funding Source

Funding Source	1 year	2 year(estimate)	3 year(estimate)	Total
Service Unit	ERS	ERS	ERS	ERS
Capital	265,000	60,000	60,000	385,000
Operation	90,000	90,000	90,000	270,000
Budget				
Other				
<b>Total Funds(Must =Total Project Costs)</b>	<b>355,000</b>	<b>150,000</b>	<b>150,000</b>	<b>655,000</b>



**Project Management Approach**

<b>Approach to Project</b>	
This document outlines the way that each component of the project will be approached. The project team should be aware of this document. It should be finalized at the end of the planning stage.	
1. Project Scope	The scope is articulated in the Project Charter. All significant changes to the scope must be reviewed for schedule, cost and quality impacts,. The decision to make the change to scope rests with the steering committee. The TPO change management process will be used. This involves the Scope Change Template.
2. Schedule Mgmt	Milestones agreed to in Project Charter. A detailed schedule will be developed that is aligned with the milestones. The project is managed via rolling wave meaning detail is discussed and elaborated upon before each phase of the project.
3. Cost Mgmt	At the CBE, the Project Manager does not track costs for the project. Having said this, the SirsiDynix costs will be pre-approved, and I high level tracking of project costs will be captured. Any additional costs will be reported to and approved by Joan Wilkinson.
4. Quality Mgmt	Quality Management relates to the quality of: i. The Functional specifications, and various assessments and plans ii. The infrastructure implementation. iii. The resolution of defects in the various platforms through Testing.  The Quality Plan documents defects in the technology and in the PM process. Corrections will be made as soon as possible to the defect event.  Quality will be achieved through transparent 3 <sup>rd</sup> party review of each of these perspectives by the steering committee, vendor and CBE stakeholders.
5.a Process Improvement	Recommendations for process improvement at to be directed to the Manager, Technical Projects Office. They may be captured in the Lessons Learned document.
5 b Change Management	The project must track to the scope defined in the Project Charter. Small changes (minimal budget, time adjustment) will be incorporated into the project plan document when they occur. Otherwise, changes will need to go through review and approval by the steering committee.
6.a Sponsorship Communication	Business engagement and reporting by Project Management will occur as specified by the TPO methodology for CBE projects.
6.b Staffing Mgmt Plan HR	After the detailed schedule is complete all required project resources will be contacted through the Manager of IMS. The kickoff meeting will review scope and deliverables.
7. Communication Mgmt	Project Communication will be planned for in the Charter. The Project Manager and the Manager IMS services will create, edit and distribute communications on the project. All communications will be approved by IMS Management. The Project \manager is responsible for administration.
8. Risk Mgmt	A risk assessment will be conducted at each Milestone. Risks will be rated on Impact and probability. Risk avoidance, mitigation and transference strategies will be devised and executed. The risk management is a shared responsibility. Risks will be reported to the Project Sponsor.
9. Procurement Mgmt	Infrastructure (hardware and software) acquisition will be managed by our IT lead.
10. Milestone List	Completed in the Project Charter

**Project Assumptions or Predecessors**

Funding for the project is in place based on version 1.3 of the Project Charter, and the Project Identification Document. This funding assumption includes the funding for hardware, software, licensing, contract and fte support.

FTE will be hired to support the SirsiDynix upgrade project and to support the application in production.

Calgary Public Library has recently converted to Symphony. Students and staff as users will experience the same library system in and out of school. Technical Services staff and IT at both institutions, CPL and CBE, will have the opportunity to collaborate and share knowledge and experience.

**Project Constraints**

Project not completed by February 2010 will result in no support for the IMS application.

Lack of on-site expertise to support the application

Extra days off for staff during the summer months will impact scheduling



**Project Risks**

Risk	Control (Controllable, Uncontrollable) C,U	Probability (high, medium, low) H, M, L	Impact (high, medium, low) H, M, L	Mitigation Strategy
Not meeting Contract Dates	C	L	H	Ensure payment toed to contract dates
Loss of support	C	L	H	Ensure support is in budget, and setup at vendor
CBE internal staff may be re-allocated to other projects	C	M	H	Dedicated staff due to urgency or Delay deployment of the project.
Database platform unproven	C	H	H	Conduct impact assessment
SirsiDynix may not wish to stage hardware onsite	C	L	M	Negotiate into the contract, stage HW at SirsiDynix
The integration between CBE IT and SirsiDynix may be disjointed	C	M	M	Formalize the support arrangements with SLA
Symphony may not match the existing functionality in Accent, and may not deliver promised functionality that is missing in Accent	U	H	M	Thorough Testing will reveal the gaps.
Lack of internal resources to support the application	C	H	H	Identify technical platform and hire a support specialist



### Organizational Impacts

Organization	Impact and Participation
Application Services	I – Time. P – The actual installation work
Educational Resources & Services	I – Time. P – The actual installation work. P - Testing. P - Training of schools.
Purchasing Services	P and I
EPS Network and Security Infrastructure	I – Time. P – The actual installation work.
EPS Data Centre Infrastructure	I – Time. P – Design and pre-build of equipment.
TIS Data Center Operations (DCO) Group.	I – Time. P – Install and configuration
TIS Network Operations (NetOps) Group.	I – Time. P - Configuration
TIS Security Operations (SecOps) Group	I – Time. P- Configuration
SirsiDynix	I – Provision of Training P – Conduct training



## Communications Plan

### Joan Wilkinson will update:

- a. ERS staff as the project moves into execution phase.
- b. Library staff as the project moves into through the execution and control phase.
- c. WebCat users based on the impact to those users. The communication plan will be related to the training plan.

The schools will be emailed bi-weekly or more frequently, if need arises. The ERS staff updated with bi-weekly meetings (in person) and informally, on an ongoing basis.

### Steve O'Brien will provide:

- a. Project status to the Steering, Working team, and Manager, Technical Project Office.
- b. Secondary stakeholders (IT Staff) updates as the project progresses.

The status report located on the TPO staffroom page will be used. It will be sent to the working committee on a weekly basis via email.

A status meeting will be held either once a month or at key milestones within the project.



**Project Team Organization Plans: [Identify Internal/External Resources]**

Position	Name & Title
<b>Senior Sponsorship:</b>	
	C. D'Silva, Director, Corporate Business Services
	C. Seibel, IT Director
<b>Working Group:</b>	
	Joan Wilkinson, Manager Educational Resources and Services
	Greg Tetz, Manager Purchasing
	Keith Rae, Manager, Application Services
<b>Operating Team:</b>	
Project Manager	Steve O'Brien, Project Manager, TPO
Lead Library Analyst	Joan Wilkinson, Manager Educational Resources and Services
Application Lead & Technical project lead	Wieslaw Jaworski, Supervisor, Application Support Services
System Administrator	Ray Miyagishima, Accent Administrator
Specialist, Curriculum & Learning Technologies	Erin Hansen, Specialist Curriculum & Learning Technologies
Acquisitions	Sandy Snow, Supervisor, Purchasing Services
Acquisitions	Donna Lamy, Sr. Purchasing Clerk
Technical Support	FTE (Application Support)
<b>IT Architecture &amp; Design Team:</b>	
Application Design Lead	Wasiq Akhtar, Commercial Off the Shelf, EPS
Architecture Lead	Monayem Huq- Senior Enterprise Planner
Solutions Architect	Tony Gross, Sup Data Centre Infra
Network Architecture and Design	Mike Rinkel – Sup NISI
Security Architecture and Design	Mike Rinkel- Sup NISI
Database Lead	Bev Hyra, Sup Database services
Application Design Lead	Wieslaw Jaworski., Sup IT Services
Deskside Architecture	Derek Deeg, Enterprise Analyst
<b>IT Production Team:</b>	
Security Technical Lead	Kevin Cavanagh , Sup SECOps
Network Technical Lead	Dan Alboiu, Sup NETOps
Data Centre Technical Lead	Jag Sangha, Sup DCO
Database Lead	Bev Hyra, Sup Database services
Application Support	Wieslaw Jaworski, Sup IT Services
Deskside Deployment	Shane Westcott, Sup Oper. Soln



## Approvals

Recommendation: Based on the scope, project resources and milestones specified in this document, proceed into the execution phase of this project.

**Approval to Move to Execution (Sign Off):**

**This project is approved, with funding in place, to proceed to the execution phase of the project.**

Name/Position	Signature	Date
<b>C. D'Silva, Director, Corporate Business Services</b>		
<b>C. Seibel, IT Director</b>		