

Groupware Project

Groupware Project Definition: Scope of Project

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1. Introduction

Groupware is a suite of software applications that helps users to work collaboratively within groups, and includes: email, on-line calendar, shared documents, workflows, web pages, shared contact lists, and online collaboration tools. The Groupware Project is to implement Microsoft Exchange and Office SharePoint Server (MOSS) to provide the required functionality.

The Groupware project is part of a larger Groupware programme. The MOSS platform offers the potential to underpin a range of additional services within the overall online collaborative environment of the collegiate University. In the Groupware Project, however, there can be no commitment to offering additional services, but it is hoped that the investment made to

implement the platform within the Groupware Project will offer opportunities for long term return and facilitate many exciting new services.

2. Management

Oxford University Computing Services (OUCS) is charged with delivering the Groupware project by 31 March 2010 and operating the subsequent service.

OUCS will provide a Project Manager, (OUCS) Project Sponsor, and house the Groupware Project Team. All staff in the Team will report to the Project Manager who in turn comes under the line management of the (OUCS) Project Sponsor. OUCS will also run an internal Steering Group for the project to deal with low-level technical issues, and will commission Special Interest Groups (SIGs) to tackle specific issues.

The Groupware Project will be overseen by the Groupware Project Board (which reports to the PRAC ICT sub-committee). The University Sponsor is the Director of IT. The Project Board may set up other sub-groups as it sees fit, to assist the project.

3. Summary of the Project Deliverables

OUCS is charged with achieving the following set of deliverables, which combined present the project specification for the Groupware Project:

- An email system conforming to current industry standards and including a rich set of features
- A contact list / address book facility which is searchable, exportable, importable, and shareable
- A calendaring system, supporting sharing of data and synchronization
- A shared data repository enabling individuals and groups within the University to store, retrieve, and maintain documents flexibly and securely across different platforms

As outlined above, the technology chosen to provide these general deliverables is Microsoft Exchange and MOSS. Therefore, OUCS will endeavour to meet the original requirements within the framework and the functionality provided by these technologies.

3.1. Functional

In more detail:

3.1.1. Email

- Each user will be offered an Exchange account with an initial storage quota of 2GB.¹ As is currently the case with the Herald email service, the quota may be extended if the specific circumstances of individuals or units migrating to the new service warrant it (see 3.6 Migration below).
- Where possible, advice and guidance will be provided to local IT Support Staff (ITSS) for the migration of local desktop archives into a format readable by the appropriate Groupware desktop client application.
- Herald users will be migrated to the new service, with schedules being agreed between OUCS and local IT support officers (representing their user communities).

¹ The storage quotas specified throughout for the initial scope match the budget and timeframe of the project, and are based on evidence derived from the 35,000 users of Herald, and other existing local Groupware systems.

- Advice and guidance will be given to other units migrating from non-Herald systems.

3.1.2. **Calendaring**

- Each user will be given the opportunity to join the University calendaring system.

3.1.3. **SharePoint**¹

The scope of the SharePoint deployment within this project represents a controlled roll out with representatives selected from across collegiate University. This will offer the University the chance to learn about the deployment of SharePoint and to plan a full scale implementation in parallel with, or following, the Groupware project. The intended scope within this project is as follows:

- Up to one thousand users, in the first instance, (expected to be an equal split between staff and students) will be able to create My Sites within the SharePoint system (personal web space for users to store, share, and maintain documents), each with between 1-5GB storage. Provision will be made to offer increased amounts of My Sites storage, but this may be given on a cost-recovery basis.
- Up to fifteen hundred Research Groups, University Committees, and University Clubs² will be able to create Sites within the SharePoint system (shared web space for activities to store, retrieve and maintain documents), each with between 1-5GB storage. Provision will be made to offer increased amounts of Sites storage, but this may be given on a cost-recovery basis.

3.1.4. **User Support**

- OUCS will provide full training, documentation, and support for users. This will entail provision of courses centrally, initial documentation which can be customised for local use, support of local IT support staff, and facilitating the OUCS Help Centre to deal with queries.
- The primary point of contact for all user queries will be the Help Centre – see <http://www.oucs.ox.ac.uk/internal/sld/help.xml>

3.1.5. **General**

- Remote and mobile access will be offered to the above services.
- Services for BlackBerry users and users of other mobile devices via Microsoft's ActiveSync will be provided during the project.
- The service will include Web-based access from a variety of platforms using a specified range of browsers.

¹ The allocation of 1000 SharePoint My Sites and 1500 SharePoint group Sites will be rolled-out through the life of the Groupware Project. However, there is every intention to offer a service which scales to enable all users to enjoy the same functionality after this project completes. The collegiate University will be encouraged to participate in the creation of a wider Groupware Programme that is likely to include the deployment of further SharePoint functionality.

² These three types of user groups in the collegiate University were chosen to complement the service offered by the University's Virtual Learning Environment, WebLearn – the focus for teaching activities and learning support material.

3.2. Definition of Users

Whilst noting the above restrictions regarding the initial SharePoint service, the other services will be available for all current staff and students of Oxford University in its collegiate form.¹ Other users, including authorised external users, may be served by these systems or by suitable alternative means if excluded from the Groupware solution by licensing constraints.

3.3. Timescales

The Groupware project began formally on 1 April 2008 and will run until 31st March 2010. The remaining schedule for the project is:-

- September-November 2008: develop and publish architectural design for Exchange, SharePoint and the directory structure which underpins it
- December-January 2009: procure hardware
- HT 2009: early adopter trials and evaluation
- TT 2009: initial service for first users
- TT 2009: establish migration/archiving SIG to advise units running existing solutions on possible future strategies
- Summer 2009: Begin migration of Herald users to new service, all new students use new service
- MT 2009- HT 2010: Begin migration of remaining users
- 31st March 2010 – Project ends, OUCS Groupware service phase begins

Throughout this process the Groupware Programme will be running and further initiatives may be run in parallel.

3.4. Resilience, high availability and technical support

The aim is to provide a service that is available 24 hours a day, 7 days a week, 52 weeks of the year. This will be achieved by building in automatic fault resolution should part of the system fail. Where staff intervention is required, best efforts will be made to maintain the service. However OUCS staff are only employed during a normal working day, five days a week. Minimal operator cover is provided from 0830 to 2030 on weekdays. Systems staff cover is normally available 0900 to 1700 on week days. Automatic monitoring of the main service elements takes place outside these hours, and informal arrangements exist for staff to be called, but no funding is provided to make this contractual.

If a fault is notified between 09:00 and 17:00 on a working day, OUCS will commence investigation and correction within one hour (provided that no similar fault is also being handled by the same team). If a fault is notified outside these hours, OUCS will use reasonable endeavours to attend the fault, but no funding is allocated to this purpose. A system of automatic server failover will be in place in order to recover quickly from component failure. A second data centre will house equipment for this automated component fail-over as well as to provide automated fail-over for the services as a whole, should the OUCS data centre be taken out of service by a disaster. This 'high availability/resilient' solution with disaster recovery also means that all live data is actively synchronised across the

¹ One limiting factor, at the time of writing is the cost of licensing "external" users (and students are included in this definition). The project aims to provide services to these users. However, the central provision of client software may be limited or absent for these users, depending on budget constraints.

two sites. This reduces the risk of live data loss. The filestore disks are also to be mirrored, and so resilient to single disk failures.

3.5. Data Recovery¹

The project will make use of the deleted items recovery functionality built into Exchange which allows users to find their own deleted items within a period of time after deletion.

Despite live data being synchronised across two sites, there is still a need for a backup service as, despite a highly-available architecture, failures can still occur for which would require the use of traditional, off-line backups to recover data. Traditional backups also meet the occasional requirement of restoring data from a previous point in time.

OUCS' plan is that data will be backed up using the Hierarchical File System (HFS) and internal working storage as most appropriate to ensure full recovery of data after hardware failure. Filestore backups should be carried out on a daily basis. The length of time that individual backups are kept will depend on funding and technical possibilities available during the project and so are not defined here.²

Users and/or local units will be responsible for backing up local desktop archives.

3.6. Migration

The Groupware project is funded to offer a service which is available to, and designed for, the entire collegiate University. Every effort will be made to help all units to transfer their users to the new Groupware service. The project has funds allocated to migrate data from the Herald system and to ingest 'live' (i.e. not archive) data from other systems. It will offer assistance on a best endeavour basis for the migration of information from other systems not currently run by OUCS, and in these cases it is anticipated that local investment of resources will be needed. The project will offer advice and guidance for the migration of data from non-OUCS systems but is not funded to provide the tools or undertake the migration on behalf of units that currently manage their own systems.

Whilst the quota for any individual user may be extended if specific circumstances warrant it, beyond the 2GB limit), where the overall average quota usage for any given unit exceeds 500MB the project may seek to recover the extra cost of providing storage and backup.³ These issues should be among the priorities of a Migration and Archive SIG (see 4.6 *Archiving* below).

3.7. Authentication

The project will provide an Active Directory service to underpin the Groupware services outlined above. It will also provide integration with the existing MIT Kerberos system to allow use of the Oxford Username and Password.

3.8. Licensing

The service will be governed by the licenses agreed under contract with Microsoft's licensing agents. The University will be responsible for maintaining these licences and renegotiating as

¹ At the time of writing, the enormous amounts of data have mandated that OUCS must expand the HFS service. Therefore, this is subject to a separate bid for funds. Backup is of paramount importance to the project but, currently, is not funded through the main Groupware Project.

² It may be anticipated that a requirement of 90 days retention would be most suitable. However, at the time of writing, the system of backup is outside of the scope of the main Groupware Project and different service levels may be selected due to the funding available.

³ The provision of storage for a 2 GB quota assumes that actual uptake will result in an average mailbox size of 500 MB. This policy may be applicable to units desiring to migrate archived data into the 'live' system.

appropriate. Decisions regarding which users, and to which extent, are licensed for the use of services will be taken by the Groupware Project Board, which, in turn, may look to the Planning and Resource Allocation Committee ICT Sub-committee (PRAC-ICT) for guidance.

4. Out of Scope

We regret that the following are considered out of scope for the Groupware project, but may form part of new funding applications and separate projects.

4.1. Data encryption

At present this is, in part, being serviced by a project focussing on PGP as an enabling technology.

4.2. Resource Booking

At present this is being investigated by Oxford University Estates Directorate (OUED) as part of their Planon Facilities Management project. The project will, however, look at the basic functionality available in the Exchange system to advise units on how they may be able to use this for basic resource booking on a localised basis.

4.3. Full SharePoint roll-out

The Project is only funded to roll out an initial instantiation of SharePoint as noted above.

4.4. Teaching and Learning Tools

This is covered by the WebLearn service (including the enhanced Weblearn service currently under beta testing).

4.5. Central Active Directory Service

The project is only funded to provide an Active Directory service to support the central Groupware facilities.

4.6. Archiving

The Project is only funded to provide a service for 'live' data. Therefore, the provision of archiving and corresponding policies is out of scope. The project will, however, establish a Migration and Archive SIG. One of the Group's tasks is likely to be the scoping of a separate archive project and recommended policy. The Group will inform the project on the following:

- migration of existing local archives;
- where migration may not be possible due to financial constraints or existing technology, tools that allow linking to existing archives;
- the deployment of a future central archive.

4.7. Backup

Back-up to allow for long-term data recovery, i.e. beyond the basic functionality in Exchange, is outside of the existing Project budget and therefore must be considered out of scope. However, a separate bid for funding has been tabled to allow for the expansion of the HFS to provide this.

5. User's responsibility

It is the user's responsibility to ensure they manage and maintain quotas, ensure local clients are patched appropriately, passwords are kept secure, and local archives are backed up. Users are expected to refrain from activity detrimental to others or to the reputation of the University (as detailed in the University "Regulations Relating to the use of Information Technology Facilities").

6. Local unit responsibility

Local units will be responsible for arranging migration of any locally held data or arranging suitable archiving. The local ITSS will be expected to provide front level support, assisted by OUCS as appropriate, and for making provision for external users through creating accounts on the system. Generally local units will adhere to the overall Conditions of Use for OUCS services.

7. Training

Training will be available from, or via, OUCS. By the end of the project, training for end users will be part of the general timetable of courses provided by OUCS. Training for ITSS via OUCS is envisaged, possibly on a cost-recovery basis.

8. Charged Services

At present no charged (or "premium") services are envisaged within the Groupware Project. This position may change, should the licence costs and budget available mandate that providing all or some functionality for one or more set of users cannot be afforded by the project or by the University as a whole. In such a case, the Groupware Project Board may decide that the functionality could be provided for a fee.