Tips for Managing Small Projects

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Dean Plumadore, MS, PMP, ITIL
Agenda

- PMBoK and Project Management
- Small Projects and Common Sense
- Templates
- Project Lessons Learned
- Project List
- Q&A

Note: flash drive with PPT and Templates
Typical “BIG” Project
“Small” Project

Magic Happens Here
What is a Project?

- Dictionary: An individual or collaborative enterprise that is carefully planned and designed to achieve a particular aim.
- PMI: A project is a temporary endeavor that has a defined beginning and end in time with defined scope and resources. It is unique in that it is not a routine operation, but a specific set of operations designed to accomplish a singular goal.
- Common definition “The disciplined, structured, and organized application of common sense to manage a temporary effort”.
- “Just follow the recipe” is not a project.
Project Management Book of Knowledge (PMBok)

- Developed by the Project Management Institute
- Project Management is the application of skills, knowledge, tools, and techniques to meet the needs and expectations of stakeholders of a project.
- Currently in V5 and includes 5 Process Groups, 9 Knowledge Areas, and 45 Processes.
- Do we need any of this for “small projects”.

Student Affairs Information Technology
Balancing the effort to do a project, the cost of the materials, and the “stuff” the customer wants… all while maintaining a high level of quality.
Yes, but... what about small projects?

What do we do differently?

-- OR --

Do we “just know”?

-- AND --

What do we leave behind?

-- for ourselves, others, ourselves?
Small Project “template”

1. **Scope/Objective** – what are we doing and maybe why in a few paragraphs
2. **Needs** – in a numbered list in basic priority
3. **Assumptions** – in a numbered list
4. **Risks** – in a numbered list in basic priority
5. **Team** – Who and what are they doing
6. **Timeline** – this is really what it’s all about, who’s doing what and when will it be done.
7. **Acceptance** – knowing when it’s done.
8. **Lessons Learned** - What can we improve for next time?
Began here……2008

Camera purchase and wiring installation for Watterson Towers and Dining Commons.

We are seeking a quote for the installation of Power Over Ethernet (POE) IP cameras and data wiring in Watterson Towers and the Watterson Dining Center. The cameras should accept a form of local storage. A secondary quote can be made for the above cameras without the local storage feature. Domes should be used where possible, unless the cameras are out of reach of students.

We are currently testing the Sony SNC-Z20N camera. We are not requiring this to be the camera proposed, but a camera of like features must be used.

The Watterson Towers installation will consist of two cameras in each breezeway in each tower for a total of 20 cameras, please see Fig. 1 for Breezeway camera location. The contractor selected for the camera installation is responsible to focus all installed cameras when the digital/network video recorder(s) are ready for that to take place.

These cameras will be wired to the third floor “House” wiring closet for their power from a POE module and data connections. Please see Fig 2 for riser data wiring plan.

The Watterson Dining Commons installation will consist of 14 cameras. 12 cameras will be installed at different locations inside. 6 cameras will be installed in the serving and eating area. 6 cameras will be installed on the floor below the Dining Commons, and two cameras will be installed outside viewing the loading docks.

Lots of emails

To-Do lists

Little documentation

“we just know”

“Lots and lots of things in my head”
Then here....2009-10

“less in my head”

More documentation for installation, etc.
And then.....2011

Templated document with:
- Needs
- Assumptions
- Risks
- Team membership
- Document updates
- Timeline with responsibilities
- Site specifics with pictures and text

"even less in my head"
Now.....2014 Template includes (5 cams, 12 pages)

- 11 needs
- 14 project assumptions
- 9 Risks
- 22 Timeline items
- Financial Budget template/calculator
- Storage/bandwidth template
- Location information template, floor plans, pics
- Appendix for Vendor info, ISU PD site survey suggestions, asbestos review, etc.
The purpose of this project is to upgrade the current Micros POS system from V3.6 to V4.0. This upgrade is largely a “technical” one, in that, it will allow SAIT to run the servers on Windows Server 2008 R2. The V3.6 software only runs on Windows Server 2003 and Microsoft has announced the EOL to be July 15, 2015. Project completion is defined by the final installation of the upgraded POS system and the customer approval and completion of testing scenarios in each revenue center.
Scope for Thing

• The purpose of this project is to create and deploy a thing. The project is complete when the thing does something, but not everything, and has passed the tests that prove the thing does something we wanted it to.
Needs – in a list

1. VM for App Server, Database Server, and Web Server
2. Software for servers:
   1. Windows Server 2008 R2 (x3)
   2. Windows SQL Server 2008 R2 (x1)
3. IPs for temporary server use
4. IP for App Server must remain the same in production
5. New IPs for DB and Web Servers
6. Redirect to new Web Server location
7. DNS name “posreports.cds.ilstu.edu”, name TBD
8. HTTPS web link with certification for validation of sign-on to MyMicros.
9. Test Plan/Cases for each Revenue Center (RVC)
10. Test Plan/Cases for server, clients, and infrastructure
11. Software restriction policy to disable POS from running on clients
12. SCCM remote capability to registers.
13. SAIT, 2 or 3 staff for field work. (may not be needed)
14. CBord, technician to do/guide upgrade process.
15. Software to preload on servers.
16. Minimize overall system outage on the calendar. Lobby Shop, UHigh, and Watterson need functionality restored as soon as possible.
17. Minimum of 1 overnight process with test transactions in place to determine if reports are functioning properly before system goes into production.
18. Create and deploy a virtual register for testing and programming.
19. KDS will need to be upgraded.
Assumptions - list

1. CDS operations are limited to UHigh and Watterson.
2. All other locations are closed.
3. SAIT/CBord will have full access to POS system at 2pm on Monday, 5/12 until Friday morning at 7am.
4. UHigh will serve lunch on Monday, 5/12 using system.
5. UHigh will use Cash Transactions for operations during outage.
6. UHigh would like system functionality on Wednesday by 7am.
7. Watterson will use Cash Transactions for customers during the outage.
8. All current POS hardware will function with new software.
9. LSH needs to be in full production on Friday, 5/16.
10. All test transactions will be voided by end of day. This will keep test sales from appearing on sales reports.
11. KDS is powered down.
Risks - list

1. LSH registers could be problematic with upgraded software.
2. NetVuPoint Database conversions will take longer than planned.
3. App Server Database conversions will take longer than planned.
   1. This will affect upgrade activities and schedule.
4. VMs are under powered for needs.
5. Do SAROps clients install with correct drivers?
6. SAN Storage is under maintenance or problematic.
   1. Bill will ask AT if there are any planned outages for this time.
   2. Bill will ask to for SAN to remain “up” during this time.
7. Database conversion may abort prematurely due to bad data in fields.
8. Update the KDS in the SAIT storeroom.
Who’s on the team

**Team Members:**
Project Sponsor – Arlene Hosea, CDS, Director
Customer SPOC – Bill Legett or Brett Swigart
Customer SME – Haley Boggs
Customer SME – Heather Berrocales
Customer SME – Grant Hoke

Project Manager – Dean Plumadore, SAIT
Technical SME – Bill Hamann, SAIT ITSS
Technical Team Member – Adam Listek, SAIT ITSS
Technical Team Member – Thomas Hawthorne II, SAIT ITSS

**Others:**
Vendor/Installer –
Cbord, Don Hoffart, dlh4@cbord.com, Installation Coordinator, 303-555-1212
CBord, Aaron, remote installer, email, phone
CBord, Lynne Crocker, mcc2@cbord.com, Field Services Manager, 585-555-1212
CBord, Brett Berger, bab3@cbord.com, Field Engineer/Advisor
CBord, Wes Urban, email, phone
# Timeline

**Timeline with Deliverables and Responsible Party:**

Overall Project Target Date: May 16, 2014

<table>
<thead>
<tr>
<th>Due Date</th>
<th>Party</th>
<th>Deliverable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb 28</td>
<td>Project Team</td>
<td>DONE - Project Discussion for scope.</td>
</tr>
<tr>
<td>Mar 19</td>
<td>Dean</td>
<td>DONE - Project Plan to Customer</td>
</tr>
<tr>
<td>Mar 20</td>
<td>Arlene, Brett</td>
<td>DONE - Project Approval.</td>
</tr>
<tr>
<td>Mar 20</td>
<td>Project Team</td>
<td>DONE - Project kick-off.</td>
</tr>
<tr>
<td>Mar 20</td>
<td>ISU Purchasing</td>
<td>DONE - Sign quote and send to CBord.</td>
</tr>
<tr>
<td>Mar 29</td>
<td>CBord</td>
<td>DONE – Statement of Work with VM specs.</td>
</tr>
<tr>
<td>TBD</td>
<td>SAIT</td>
<td>DNS, URL, New IPs, etc</td>
</tr>
<tr>
<td>May 7</td>
<td>CBord</td>
<td>Ship/Receive software for update.</td>
</tr>
<tr>
<td>May 7</td>
<td>SAIT</td>
<td>Provision VMs and install OS/SQL.</td>
</tr>
<tr>
<td>May 9</td>
<td>SAIT-ITSS</td>
<td>Label all registers</td>
</tr>
<tr>
<td>May 9</td>
<td>SAIT, CBord</td>
<td>Conf Call with Installer to finalize plans.</td>
</tr>
<tr>
<td>May 9</td>
<td>Team</td>
<td>Test Plan for RVC transaction tests.</td>
</tr>
<tr>
<td>May 12</td>
<td>SAIT</td>
<td>Shut down system and prepare data.</td>
</tr>
</tbody>
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**Illinois State University**

*Illinois' first public university*
## Timeline, Acceptance

<table>
<thead>
<tr>
<th>Date</th>
<th>Responsible Party</th>
<th>Task Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>May 15</td>
<td>Dean, SPOC</td>
<td>Create Project Punch list.</td>
</tr>
<tr>
<td>May 15</td>
<td>SAIT</td>
<td>Correct Punch List Items.</td>
</tr>
<tr>
<td>May 15</td>
<td>Dean, SPOC</td>
<td>Customer Final Acceptance.</td>
</tr>
<tr>
<td>May 16</td>
<td>SAIT</td>
<td>Project Complete.</td>
</tr>
</tbody>
</table>
Acceptance, Verification, Sign-off, Approval, etc…..

1. **Server and Infrastructure testing**
   1. 10 point plan to test components of the upgrade

2. **Customer side testing**
   1. Customer SME created all test cases and executed each test and recorded results
   2. 11 Revenue centers tested
   3. Each had a number of transactions to exercise all of the hardware in the venue.
   4. To test each tender type: Cash, Credit Card, and Redbird Card

3. Why do this and write it down?
4. Is the project work done? Did we deliver what was specified in objective and needs?
Project Lessons Learned

- What did you learn to make the next project better?
- How do you document those items?
- Example with Security Camera Plans.
- Progressively more complex plans – Why?
“Build a Deck” Project

• Check out the “template” from this company who builds decks:
Q & A

• Did you see an application?
• What’s 1 thing you might use?
• rsbaile@ilstu.edu  
dempluma@ilstu.edu
• Template for FourWinds Displays and Conf Room Tech
• Security Cameras, Micros Upgrade, Business Case, docs available
Thank you