Personal and Group Productivity: Communication, Collaboration, and Coordination

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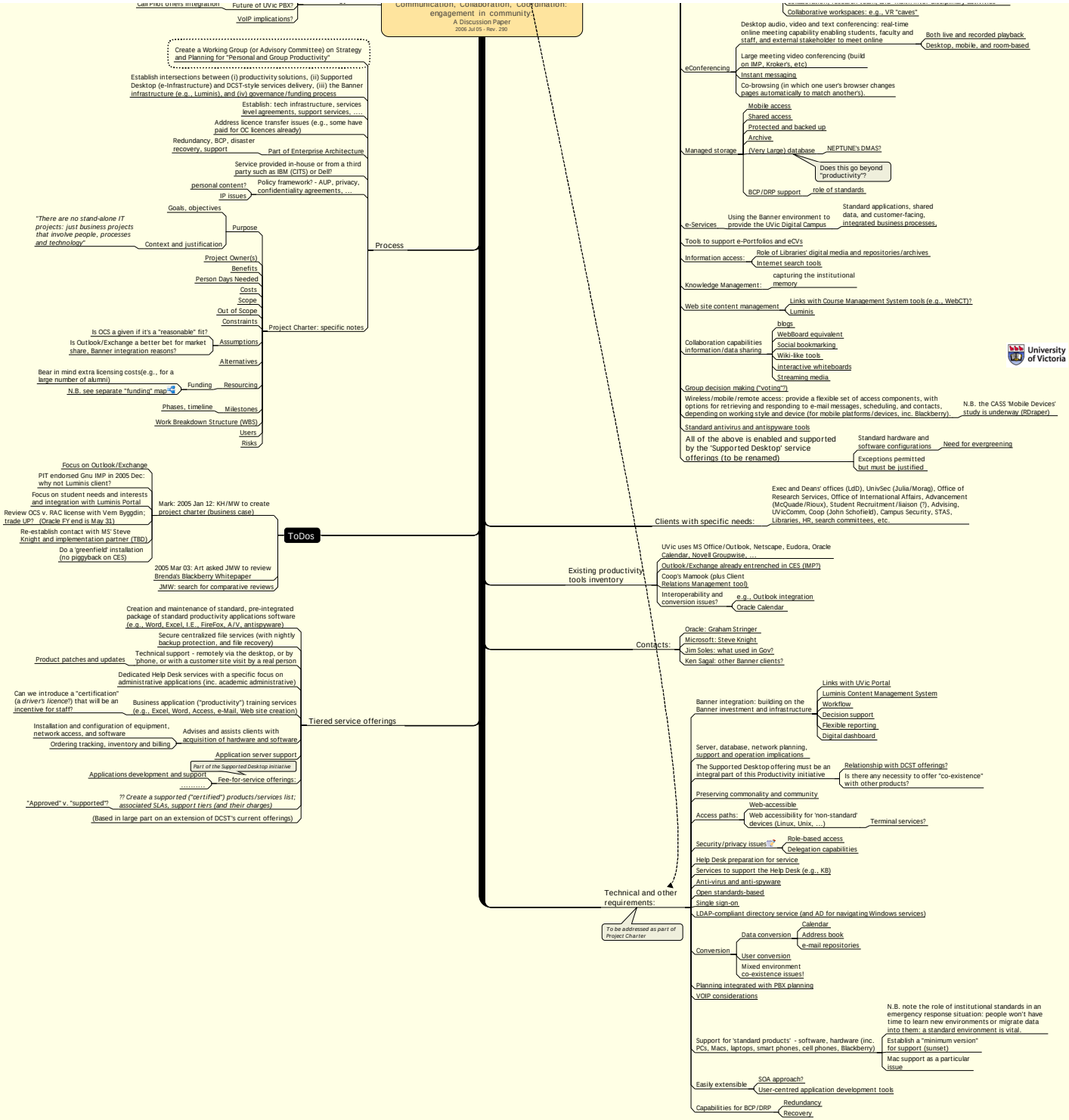
  - Context and Rationale:
    - Start Here --->
    - *It is unlikely that UVic could implement all of the productivity solutions described below in one step. Instead it should consider the set of solutions as a whole and adopt a phased implementation plan with prioritised needs and funding allocations.*
    - Much of university life is about communication, collaboration, and coordination, and engagement in community
      - Information technology can play a significant role in assisting in all of these activities
    - Target communities:
      - Faculty, staff
      - Students: actual, prospective; u/g, p/g; f/t, p/t;
      - Alumni
      - (Selected) external stakeholders
      - N.B. These tools and environment are intended equally for both the academic and administrative communities (plus their external partners)
    - Problems/costs/risks of current environment
      - Deficiencies in existing solutions creating dissatisfaction, problems
        - POP/IMAP inconsistencies
        - Threatened migrations to CES' Exchange service
      - Diversity creates inefficiency, reduces effectiveness
      - Diversity increases operational and support costs
      - Diversity increases the risk of breaches of confidentiality
      - Diversity impedes development of enhanced services
    - Benefits:
      - Finding information more easily
      - Working more productively in teams
        - Sharing and exchanging information
      - Connecting more effectively with others
      - Compensating for geographical isolation of team members
      - Providing a consistent user experience
      - Controlling the costs of technology
    - Technology's role in enabling new ways of working
      - Improving business processes (e.g., with workflow tools)
      - Coping with rising workloads and shrinking planning horizons
      - Automating routine and repetitive activities thus freeing staff to provide more personal services and to use their creative skills
      - Note the importance of improved personal productivity to gaining institutional productivity
    - N.B. the extreme importance of available, familiar, unambiguous, uncomplicated communications, collaboration and coordination capabilities in emergency situations
    - Service benefits
      - *"UVic's clients should not have to understand UVic's organizational structure or the campus map in order to conduct most of their business with UVic" - UVic CIO*
        - e.g., paying fees
  - Questions for Discussion: see separate mmap
  - Implementation Steps
    - Objectives:
      - *TBD ...*
    - RFP:
      - Pros:
        - Provides clear justification for choice
        - May be legal requirement if we are no longer interested in OCS
      - Cons:
        - Already licensed for OCS
        - Time-consuming
        - Needs Purchasing's advice
    - Approach options:
      - [Pilot project] - MS Outlook/Exchange
        - Pros:
          - Mainstream
          - Better all-round integration
          - Predominant market share
          - Comprehensive market support
          - Better skills availability
          - More attractive for recruitment
          - Comprehensive
          - Well known on campus
          - Potential for MS as a strong partner
          - *Intent to continue unless a 'showstopper' is found*
        - Cons:
          - No RFP to validate choice
          - Discards licensing in OCS
            - Try to get trade-off for RAC from Oracle
      - Continue with OCS
        - Pros:
          - Already licensed
        - Cons:
          - Limited install base?
          - Integration with Banner?
          - Limited availability of staff skills?
          - Limited appeal to prospective CASS employees
      - Swap front and backends separately?
        - Scalix's Linux-based email/calendaring solution
        - Novell's (Ximian) Evolution (needs further analysis)
        - Open-XChange Server
    - Package options
      - Collaboration
        - Lotus Notes/Domino
          - Oracle Collaboration Suite
        - Microsoft Outlook/Exchange
          - Campus wide license for Microsoft products?
          - Microsoft Productivity Tools for students?
          - Office Live Meeting
          - SharePoint
        - Elluminate
      - Contact management
        - ACT! by Sage Premium for Workgroups 2006
        - GoldMine Corporate Edition 7.0
      - Open Source alternatives? Implications? (cf. Productivity Pilot experience!)
        - Novell (Ximian) Evolution (+ Connector for Exchange), etc
        - Office suites
          - StarOffice
          - OpenOffice.org
        - See comments in 'DesktopLinux.com'
        - Chandler *[yet immature]*
        - www.gnome.org - see "bounties" for integration challenges?
      - Contract for implementation services?
      - Outsourced services
        - Service Offerings
          - ThinkFree Office 3
            - See review
          - Commodity services (e.g., GMail)
          - Softricity - software as a service
          - IBM, TELUS
        - If pilot OK then TELUS to upfront costs?
        - Include students in pilot?
      - Conversion and parallel operation issues
      - *cf.* Productivity Pilot: 2004 March
      - Reviews
        - MS Office 2003 compared to OpenOffice (eWeek)
        - MS Office alternatives review (eWeek)
    - Reference sites?
      - OCS (only a few - via Oracle's own site)
        - Abilene Christian University, Tx
        - University of North Carolina at Chapel Hill
        - Embry-Riddle Aeronautical University
        - California Polytechnic State University
        - Lawrence Berkeley National Laboratory
      - OCS Users Forum
  - Technology churn
    - Consideration of: SMS, social media, RSS, content aggregation, podcasting, blogs, instant messaging, Webcasting, IP call centres, etc.
    - Impact of Web Services (SOA), etc?
    - Call Pilot offers integration
  - UVic Productivity Package
    - Office Tools
      - Objective: to provide standard packages of products, services, facilities, support, and processes/procedures to improve UVic productivity:
        - N.,B. productivity tools are important to the academic community just as much as to the administrative community; for example automating the workflows associated with academic appeals, faculty hiring, grant application processes, and enabling multi-institution research collaborations.
      - Word processing (e.g., Word)
      - Spreadsheets (e.g., Excel)
      - (Personal) databases (e.g., Access)
      - Presentations (e.g., PowerPoint)
      - Charting (e.g., Visio)
      - Task and project management (personal) (e.g., Outlook Tasks and MS Project)
    - Unified messaging: e-mail, voicemail, and faxes accessible through any client or device of choice – Internet standards based clients, Microsoft Outlook, smart phones, and other wireless devices
      - Users can connect with their "unified" inboxes using multiple clients:
        - Desktop client (e.g., Outlook, Eudora)
        - Wireless client: laptop, smart phone
        - Mobile client: smart phone/phone
        - Thin client: Web browser
        - Fax client
      - *Always-On* capabilities for mobile access
      - Voicemail & Fax: provide access to voice mails through multiple channels including the telephone, standards-based clients, and through the Web.
        - Telephony integration
      - LdD: "David sending e-mail from multiple IDs"
        - *Include non-UVic identities as well; e.g., in a strike situation we may need to use non-UVic e-mail*
      - LdD: "e-mail merges in Word/Outlook: sends before a chance to vet!"
        - *Use manual send in Outlook?*
      - LdD: need targeted messaging capability
        - IdM tools?
        - Tools for multiple avenues and repeated contact attempts and acknowledgements
          - Recruitment campaigns (e.g., student recruitment, fundraising)
      - LdD: selective delivery of only urgent content (e.g., the President in a meeting)
      - LdD: need capability to ensure that attachments are delivered in a predefined order (e.g., for ease of collation)
      - Shared/secure directories
    - Calendaring: time management with personal, group, and resource scheduling functionality enabling a wide range of access methods to give up-to-date calendar information on any client or device (across multiple sites - needs federated IdM)
      - Event management
        - "Unified Calendaring" for all of students, faculty, and staff
    - Collaboration capabilities for managing team and project collaboration needs
      - Shared workspaces for teams
        - Organize and manage documents, people, meetings, tasks and discussions within the scope of a activity/project.
          - Tracking Exec contacts across multiple Exec staff
          - Project management capabilities (e.g., assigning linked tasks)
          - Security issues: ability temporarily to delegate/deny access to information/functions (e.g., during vacations).
          - Broad planning across multiple units, e.g., alumni, event tracking, shared and secure/private data.
      - Task, workflow and project management tools (for individuals and across groups)
        - workflow examples: hiring processes, grant application processes, ...
      - Document/file management
        - Version control
        - Digital signatures
        - Shared editing
        - records management and records retention
        - Enterprise search tools
          - unstructured (e.g., Google)
          - Structured (e.g., XML-based)
        - Digital archiving
          - *Library's DSPACE??*
      - uSource portal channels for targeted delivery
      - Discussions: enables users to post messages and questions and to share answers and ideas on a particular theme or subject, accessible through a standalone web interface, portals, or websites.
      - Customer Interaction Management (CIM) tools
        - shared databases (e.g., contact information, expertise databases)
      - Support for 'virtual communities' to complement/extend group learning, collaboration, research team, and multi/inter-disciplinary activities


Communication, Collaboration, Coordination: engagement in community
A Discussion Paper
2006 Jul 05 - Rev. 290
Call Pilot drivers integration
Future of UVic PBX?
VoIP implications?
Process
Create a Working Group (or Advisory Committee) on Strategy and Planning for "Personal and Group Productivity"
Establish intersections between (i) productivity solutions, (ii) Supported Desktop (e-Infrastructure) and DCST-style services delivery, (iii) the Banner infrastructure (e.g., Luminis), and (iv) governance/funding process
Establish: tech infrastructure, services level agreements, support services, ...
Address licence transfer issues (e.g., some have paid for OC licences already)
Redundancy, BCP, disaster recovery, support
Part of Enterprise Architecture
Service provided in-house or from a third party such as IBM (CITS) or Dell?
Policy framework? - AUP, privacy, confidentiality agreements, ...
personal content?
IP issues
Project Charter: specific notes
Goals, objectives
Purpose
"There are no stand-alone IT projects: just business projects that involve people, processes and technology"
Context and justification
Project Owner(s)
Benefits
Person Days Needed
Costs
Scope
Out of Scope
Constraints
Is OCS a given if it's a "reasonable" fit?
Is Outlook/Exchange a better bet for market share, Banner integration reasons?
Assumptions
Alternatives
Bear in mind extra licensing costs(e.g., for a large number of alumni)
Funding
N.B. see separate "funding" map
Resourcing
Phases, timeline
Milestones
Work Breakdown Structure (WBS)
Users
Risks
ToDos
Focus on Outlook/Exchange
PIT endorsed Gnu IMP in 2005 Dec: why not Luminis client?
Focus on student needs and interests and integration with Luminis Portal
Review OCS v. RAC license with Vem Byggdin: trade UP? (Oracle FY end is May 31)
Re-establish contact with MS' Steve Knight and implementation partner (TBD)
Do a 'greenfield' installation (no piggyback on CES)
Mark: 2005 Jan 12: KH/MW to create project charter (business case)
2005 Mar 03: Art asked JMW to review Brenda's Blackberry Whitepaper
JMW: search for comparative reviews
Tiered service offerings
Creation and maintenance of standard, pre-integrated package of standard productivity applications software (e.g., Word, Excel, I.E., FireFox, A/V, antispyware)
Secure centralized file services (with nightly backup protection, and file recovery)
Technical support - remotely via the desktop, or by 'phone, or with a customer site visit by a real person
Product patches and updates
Dedicated Help Desk services with a specific focus on administrative applications (inc. academic administrative)
Can we introduce a "certification" (a driver's licence?) that will be an incentive for staff?
Business application ("productivity") training services (e.g., Excel, Word, Access, e-Mail, Web site creation)
Installation and configuration of equipment, network access, and software
Advises and assists clients with acquisition of hardware and software
Ordering tracking, inventory and billing
Application server support
Part of the Supported Desktop initiative
Applications development and support
Fee-for-service offerings:
.....
?? Create a supported ("certified") products/services list; associated SLAs, support tiers (and their charges)
"Approved" v. "supported"?
(Based in large part on an extension of DCST's current offerings)
Collaborative workspaces: e.g., VR "caves"
eConferencing
Desktop audio, video and text conferencing: real-time online meeting capability enabling students, faculty and staff, and external stakeholder to meet online
Both live and recorded playback
Desktop, mobile, and room-based
Large meeting video conferencing (build on IMP, Kroker's, etc)
Instant messaging
Co-browsing (in which one user's browser changes pages automatically to match another's).
Managed storage
Mobile access
Shared access
Protected and backed up
Archive
(Very Large) database
NEPTUNE's DMAS?
Does this go beyond "productivity"?
BCP/DRP support
role of standards
e-Services
Using the Banner environment to provide the UVic Digital Campus
Standard applications, shared data, and customer-facing, integrated business processes.
Tools to support e-Portfolios and eCVs
Information access:
Role of Libraries' digital media and repositories/archives
Internet search tools
Knowledge Management:
capturing the institutional memory
Web site content management
Links with Course Management System tools (e.g., WebCT)?
Luminis
Collaboration capabilities information/data sharing
blogs
WebBoard equivalent
Social bookmarking
Wiki-like tools
interactive whiteboards
Streaming media
Group decision making ("voting"?)
Wireless/mobile/remote access: provide a flexible set of access components, with options for retrieving and responding to e-mail messages, scheduling, and contacts, depending on working style and device (for mobile platforms/devices, inc. Blackberry).
N.B. the CASS 'Mobile Devices' study is underway (RDraper)
Standard antivirus and antispyware tools
All of the above is enabled and supported by the 'Supported Desktop' service offerings (to be renamed)
Standard hardware and software configurations
Need for evergreening
Exceptions permitted but must be justified
Clients with specific needs:
Exec and Deans' offices (LdD), UnivSec (Julia/Morag), Office of Research Services, Office of International Affairs, Advancement (McQuade/Rioux), Student Recruitment/liaison (?), Advising, UVicComm, Coop (John Schofield), Campus Security, STAS, Libraries, HR, search committees, etc.
Existing productivity tools inventory
UVic uses MS Office/Outlook, Netscape, Eudora, Oracle Calendar, Novell Groupwise, ...
Outlook/Exchange already entrenched in CES (IMP?)
Coop's Mamook (plus Client Relations Management tool)
Interoperability and conversion issues?
e.g., Outlook integration
Oracle Calendar
Contacts:
Oracle: Graham Stringer
Microsoft: Steve Knight
Jim Soles: what used in Gov?
Ken Sagal: other Banner clients?
Technical and other requirements:
To be addressed as part of Project Charter
Banner integration: building on the Banner investment and infrastructure
Links with UVic Portal
Luminis Content Management System
Workflow
Decision support
Flexible reporting
Digital dashboard
Server, database, network planning, support and operation implications ...
The Supported Desktop offering must be an integral part of this Productivity initiative
Relationship with DCST offerings?
Is there any necessity to offer "co-existence" with other products?
Preserving commonality and community
Access paths:
Web-accessible
Web accessibility for 'non-standard' devices (Linux, Unix, ...)
Terminal services?
Security/privacy issues
Role-based access
Delegation capabilities
Help Desk preparation for service
Services to support the Help Desk (e.g., KB)
Anti-virus and anti-spyware
Open standards-based
Single sign-on
LDAP-compliant directory service (and AD for navigating Windows services)
Conversion
Data conversion
Calendar
Address book
e-mail repositories
User conversion
Mixed environment co-existence issues!
Planning integrated with PBX planning
VOIP considerations
Support for 'standard products' - software, hardware (inc. PCs, Macs, laptops, smart phones, cell phones, Blackberry)
N.B. note the role of institutional standards in an emergency response situation: people won't have time to learn new environments or migrate data into them: a standard environment is vital.
Establish a "minimum version" for support (sunset)
Mac support as a particular issue
Easily extensible
SOA approach?
User-centred application development tools
Capabilities for BCP/DRP
Redundancy
Recovery
University of Victoria