END USER SUPPORT: DESKTOP SUPPORT

SUBPROJECT PLAN

Project Information

Project Team Leads: Shawn Potter
Jenifer Steil

Project Manager: Mike Frangi

TeamDynamix Project Number: 241065

Project Overview

The Desktop Support project will focus on implementing a shared service model for campus end user device management and support as well as end user consultation on commodity services. The goal is to leverage existing resources and provide increased efficiency through reduction of redundant efforts. IT best practices will be promoted while identifying strategies for specialized support as necessary.

To do so the following requirements as outlined in the desktop and end user consulting sub project charter will be implemented:

- Desktop support across campus will utilize consistent processes and best practices across the entire device lifecycle (e.g. planning, procurement, deployment, management, support, disposal, etc.).
- Desktop support across campus will utilize consistent tools including (but not limited to): call tracking, remote support, deployment tools, management tools, inventory, etc.
- Desktop support will be responsible for overseeing and implementing best practices in security for end users and their computers/devices.
- An IT Desktop Support and Specialized Consulting Service Level Agreement (SLA) will be created. The SLA will define the services provided to end users by the OneIT End User Support Service. This is meant to be a broad document not a unit by unit agreement.
- High degree of effectiveness and problem response to patient care and safety will be maintained.
- High degree of effectiveness and problem response for student instruction will be maintained.
- Promote innovative activities and the flexibility to address specialized needs in instruction, research, clinical, and administrative missions.
- Identify Key Performance Indicators (KPIs) in order to assess the success of this project.
Definition of Desktop Support and Specialized Technology Consulting

A key component of this project is to define what desktop support and specialized technology consulting entail. This will allow the project team to differentiate between the two and allow the appropriate decisions to be made regarding the commodity support that can be centralized and the specialized technology consulting that should remain in the units. Students are a highly valued labor source and will follow the functions listed below. Exact terminology for roles to be determined by project team. In this regard the project team has come with the following definitions:

**Desktop Support:**

**How is Function Provided:** This service will be provided centrally as part of the Extended Technical Support Team.

Desktop support professionals offer broad experience and knowledge of the University, central IT services and have developed working relationship with their end users. By working closely with each other and with other IT professionals on campus, they provide a level of continuity and coordinate access to expert resources, work with units to comply with University computing standards, and serve as a resource representing the IT needs of individual units. This function will cover new hires, existing staff and student workers.

The following is an initial list of job responsibilities that will be further defined. Initial responsibilities include:

- Support the standard device lifecycle process including: procurement, deployment, support and eventually disposal of the devices
- Provide support for the OS including Macintosh and Windows (exact list to be determined)
- Provide support for standard software packages (e.g. Microsoft Office, Skype for Business, Web Browsers, Adobe Products, etc.). Exact list yet to be determined
- Responsible for general security for users and devices (e.g. deploying encryption, running identify finder and other best practices)
- Receive escalated tickets from the ITS Service Desk and escalate tickets as needed to subject matter experts (SMEs) or local Specialized Technology Consultants
- Facilitate training (formal or informal) on standard equipment and services
- Provide first level support for the standard IT services offered to campus (exact list to be determined). E.g. (ICON, Panopto, Qualtrics, etc.)
OneIT@Iowa
Project Plan

- Manage first level Active Directory function
- Provide backup support for peers
- Relationships and communication within all realms of the End User Support service is integral to success
- Identify opportunities for improving printing, scanning, file permissions and data management best practices

Specialized Technology Consulting:
How is Function Provided: Locally for colleges; available centrally for administrative units

Specialized Technology Consulting is based around the advanced IT needs of Administrative and Collegiate units on campus. These needs are often focused around teaching and research where one-off customized solutions are determined to be required. These solutions often do not scale well and require an individual with knowledge of the environment and the customer in order to provide a sustainable solution that satisfies the needs of the faculty in conjunction with IT Security Office directives.

The following are an initial list of job responsibilities that will be further defined. Initial responsibilities include:

- Support the specialized device lifecycle process including: procurement, deployment, support and eventually disposal of the devices. Examples include virtual environments and research equipment.
- Provide specialized support for the OS including Macintosh and Windows (exact list to be determined)
- Provide support for unit-specific IT services, software and other unique IT efforts
- Handle special requests that are not covered by a central service or support group
- Provide project management and other support when implementing new IT systems
- Point of contact for an area when there are special requirements, compliance, or contractual agreements
- High-level patient care, research and teaching support
- Support non-standard computing and network solutions
- Advanced security and infrastructure issues
- Specialized training and documentation for IT services and software not provided centrally
- Provide back up support for peers
- Relationships and communication within all realms of the End User support service is integral to success
- In certain situations there may be some cross over between specialized consulting and desktop support. This should only happen in unique cases.
- Identify opportunities for improving distance education
Project Staffing

<table>
<thead>
<tr>
<th>Who</th>
<th>Department</th>
<th>Skill Set</th>
<th>Estimated Time Commitment</th>
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<tbody>
<tr>
<td>Shawn Potter</td>
<td>ITS</td>
<td>Project Lead, Desktop Support</td>
<td>200</td>
</tr>
<tr>
<td>Jenifer Steil</td>
<td>CLAS</td>
<td>Project Lead, Desktop Support</td>
<td>200</td>
</tr>
<tr>
<td>Mike Frangi</td>
<td>ITS</td>
<td>Project Manager</td>
<td>150</td>
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<tr>
<td>Tracy Scott</td>
<td>ITS</td>
<td>IT Director, Technical Expert</td>
<td>100</td>
</tr>
<tr>
<td>Lance Bolton</td>
<td>CLAS</td>
<td>IT Director, Technical Expert</td>
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<tr>
<td>Chuck McBrearty</td>
<td>Dentistry</td>
<td>IT Director, Technical Expert</td>
<td>100</td>
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<tr>
<td>Tim Shie</td>
<td>Public Health</td>
<td>IT Director, Technical Expert</td>
<td>100</td>
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<tr>
<td>Peter Yohe</td>
<td>Pharmacy</td>
<td>Technical Expert</td>
<td>100</td>
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<tr>
<td>Wayne Kintz</td>
<td>College of Education</td>
<td>Technical Expert</td>
<td>100</td>
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<tr>
<td>Darrin Thompson</td>
<td>College of Business</td>
<td>Technical Expert</td>
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<tr>
<td>Chris Clough</td>
<td>ITS</td>
<td>Technical Expert</td>
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<tr>
<td>Makur Jain</td>
<td>CLAS</td>
<td>Technical Expert</td>
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Total Estimate: 1350

Project Schedule

Below is a high level project schedule outlining four project stages and approximate timeframes associated with each stage. This schedule will be detailed as the project team goes through each outlined stage.

**Phase 1 Initiation (Spring – Summer 2015) April 2015 – June 2015 → COMPLETE**

- Develop Project Charter
- Develop Stakeholder Registry
- Campus Engagement
- Form sub project team

**Phase 2 Planning (Summer/Fall 2015) July 2015 – October 2015 → IN PROGRESS**

- Engage Campus Directors to determine / verify scope of work
- Determine engagement, communication change management strategies
- Engage IT campus community as needed for feedback
Project Plan

- Define implementation strategy.
  - End user support will be treated as a single entity for implementation. Helpdesk, desktop and device management processes will be addressed in parallel unit by unit.
    - CLAS will be the next early adopter to implement the OneIT End User Support service model. Other units may be identified or asked to be an early adopters and a roll out schedule will be outlined.
  - Implementation project will engage with each IT Director to outline current IT Structure. Identify the unique needs and develop a specific implementation plan for each unit.
- Define Appropriate people, resources and early adopters
- Define high level risks and mitigation strategy per campus units

Phase 3 - Implementation

- **Stage 1 – Early Adopters** (Fall 2015) November 2015 – May 2016
  - Continue Campus Engagement as defined in Stage 1 (provide updates on Project and gather feedback)
  - Celebrate and reinforce successes
  - Outline service model
  - OneIT Steering Committee Approval of new service model
  - Vet service model by campus IT community
  - Start implementing with early adopters groups
  - Tweak service based on feedback
- **Stage 2 – Roll Out** (Spring 2016 - Summer 2017) June 2016 – September 2017
  - Continue Campus Engagement as defined in Stage 1 (provide updates on Project and gather feedback)
  - Celebrate and reinforce successes
  - Define schedule for rollout of service to rest of campus
  - Start implementing new service with rest of campus based on rollout scheduled
  - Update campus IT community

Phase 4 – Close Out (Fall 2017) October 2017

- Project Close Out
- Ongoing service enhancements
- Celebration get together

Project Budget

Investments in the following tools could potentially increase efficiency in the delivery of the OneIT Desktop and End User Consulting service.

- Training Programs
**Project Plan**

- Ticket system (Not sure what that looks like right now) – consistency in using the tools that we have
- Pamphlets to be used after training
  - Shirts, Business cards, Post-it notes with our branded identity (e.g., use on users' workstations for status updates on IT issues, etc.)

In addition, approximately 1350 hours in staff time are estimated for implementation of the OneIT Desktop and End User Consulting sub project.

**Change Control Plan**

Substantial changes to project scope will be brought to the OneIT Steering Committee for evaluation and resolution.

**Communications Plan**

<table>
<thead>
<tr>
<th>Target Audience</th>
<th>Primary Contact</th>
<th>Communication Mechanism</th>
<th>Frequency</th>
<th>Purpose/Description of Communication</th>
<th>Author/Owner</th>
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<tbody>
<tr>
<td>OneIT Steering Committee</td>
<td>Program Office</td>
<td>Email, meetings</td>
<td>Monthly, ad hoc as needed</td>
<td>Updates on project, feedback</td>
<td>Mike Frangi</td>
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<tr>
<td>Project Team</td>
<td>Shawn Potter, Jenifer Steil</td>
<td>Recurring Team Meetings</td>
<td>Weekly</td>
<td>Plan and Implement</td>
<td>Mike Frangi</td>
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<tr>
<td>OneIT Leaders</td>
<td>Chris Clark</td>
<td>Email, meetings, presentations</td>
<td>As needed</td>
<td>Updates on project, feedback from group</td>
<td>Mike Frangi</td>
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<tr>
<td>Collegiate IT Leaders</td>
<td>Tim Shie</td>
<td>Email, meetings</td>
<td>As needed</td>
<td>Updates on project, feedback from group</td>
<td>Mike Frangi</td>
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<td>ITADmin Community</td>
<td>Tim Wolf</td>
<td>Email, presentations</td>
<td>As needed</td>
<td>Updates on project, feedback from group</td>
<td>Tim Wolf</td>
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<td>Advisory Committee</td>
<td>Mike Frangi</td>
<td>Email, meetings, presentations</td>
<td>Quarterly or as needed</td>
<td>Updates on project, feedback from group</td>
<td>Mike Frangi</td>
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<tr>
<td>Engineering Computing Committee</td>
<td>Jon Kuhl</td>
<td>Email, meetings, presentations</td>
<td>As needed</td>
<td>Updates on project, feedback from group</td>
<td>OneIT Program Office</td>
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<tr>
<td>Deans and Associate Deans</td>
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<td>Email, meetings, presentations</td>
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<td>Updates, staffing decisions</td>
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<td>Students</td>
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<td>Researchers</td>
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<td>Purchasing</td>
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<td>OneIT End User Project Website</td>
<td>Nicole Riehl Dahya</td>
<td>Publishing news and timeline to the website</td>
<td>Weekly</td>
<td>Update the public on project progress</td>
<td>Mike Frangi</td>
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<td>HR Representatives</td>
<td>TBD</td>
<td>Email, meetings</td>
<td>As needed</td>
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Risk Management Plan

Risks will be identified during project team meetings, interviews or discussions with project stakeholders. Once identified the risks will be assessed and the likelihood of occurrence and impact on the project will be determined. Risk mitigation strategies will be developed for risks that have a high impact and a high likelihood of occurrence on the project. The risk tracking list will be located on the Desktop Support SubProject SharePoint Site.

Issue Tracking and Resolution Plan

Issues will be identified during project team meetings, interviews or discussions with project stakeholders. Once identified the issues will be evaluated, tracked and assigned in the issue tracking list located on the Desktop Support SubProject SharePoint Site.

Metrics / Key Performance Indicators

- Faculty & Staff Satisfaction Survey – IT Component
- Students and Grad student survey IT satisfaction
- Method to track fractionalization for staff savings
- Possible KPI’s for End User Support
  - Response Time
  - First Contact Resolution Rate
  - Time to Resolve
  - Incidents v. Service Requests
  - Issue Resolved by Help Desk
  - Emergency Incidents
  - Aging Incidents
  - Ticket volume
  - Outdated Documentation
  - End user compliance re: systems management
  - Outreach
- Possible KPI's for End User Support Management
  - Onboarding Strategies
  - Training Opportunities
  - Employee Engagement Efforts
  - Staff Recognition
  - Employee Retention
# Key Dates

<table>
<thead>
<tr>
<th>Description</th>
<th>Date</th>
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<tbody>
<tr>
<td>Charter Ratification Date</td>
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<tr>
<td>Project Plan SC Approval Date</td>
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