# project plan, with checklist

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## This document contains a preliminary project plan showing the main tasks that needs to be performed as well as a check list showing the tasks that Kristianstad Kommun needs to fulfill before the implementation. Prior to signing a delivery contract, the parties need to agree upon a realistic timeframe (schedule) that is based on the tasks and checklist, according to the parties’ resources at the time. The below implementation plan and checklist states the tasks to be performed by Kristianstad Kommun, and therefore shows the super-user resources and IT-resources they need to assign for the implementation.

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The total installation is estimated to 25-35 hours.

## Implementation - Day one

## Architectural overview

**Description:** Outline of the architecture of Concierge Services

**Expected attendees:** Deployment/Windows Desktop resource, Exchange resource, project manager

**Time usage:** approximately 1 hour session on a whiteboard

## microsoft Exchange building blocks

**Description:** Creating the necessary Concierge mailbox, logging on to the mailbox and setting user permissions, Creating Service Unit mailboxes or use existing ones? Creating a testuseraccount, Creating/verifying the meeting room mailbox (Room Mailboxes are preferred) settings. Setting up Microsoft 2003 AutoAccept Agent, if and only if, the meeting room mailboxes are stored on an Exchange 2003 Server. If you have Outlook 2003 clients, where you want Concierge Services installed, you will need to implement Microsoft Outlook Security Settings for managing the Outlook 2003 Security. We can help with this task, but having this task solved prior to the implementation is preferred.

**Expected attendees:** Exchange resource

**Time usage:** approximately 1-2 hours. However, if we need to implement Microsoft Outlook Security Settings, the time needed for the task will increase.

## Setting up a PC to create the Concierge setup on

**Description:** We would like to have access to a laptop/PC, which is representative for the other laptops/PCs of the organization. We will need to be able to log on to the laptop/PC as both the Concierge user and as the testaccountuser. We will either deploy the software on the machine using a tool, or manual install it. If we hand install it, the testaccountuser needs administrative privileges on the machine.

We need Microsoft .Net Framework 4 on the Windows based machine. We also need Microsoft Office installed.

**Expected** **attendees:** Deployment/Windows Desktop resource

**Time** **usage:** 0 minutes, if you have a computer for the purpose already.

## Creating sample Concierge Masterdata

**Description:** We will create the sample Masterdata, placing files on a company share (using unc notation ([\\somewhere\somefolder\](file:///\\somewhere\somefolder\))).   
We also need to install Concierge Services Adminstration.msi on the machine.

**Expected attendees:** Deployment/Windows Desktop resource (but the Client resource do not have to be present all the time)

**Time usage:** approximately ½ hour.

## Installing the other clientside modules / testing the orderflow

**Description:** To ensure that everything functions correctly we need to install all available Concierge software. If the testuseraccount gets administrative privileges and hand installation is permitted, we will not need any internal resources to help us out with the installation.

**Expected attendees:** Deployment/Windows Desktop resource

**Time usage:** ½ hour

## Proof on concept test run

**Description:** Prove that the software functions correctly

**Expected attendees:** Deployment/Windows Desktop resource, Exchange resource, project manager

**Time usage:** approximately 5-10 minutes

## Preparations and installation - Mobility Service

**Description:** The Concierge Services Mobility Service is a Windows Service needed to ensure an updated Shared Repository (the calendar of the Concierge mailbox) containing the organization’s meeting activity. It also ensures that Meeting Request updates/cancellations handled through other e-mail clients than Outlook (mobiles, Outlook Web Access) will result in corresponding updates to the affected Service Units.

We need to create a Service Account with Full Mailbox Access to the Concierge Users’ mailboxes in the organization. We also need a Security Group whose members should be all Concierge users. The Service Account must have a designated mailbox.

The software is not supposed to be installed on the Exchange server directly. It should be installed on a different Windows Server based machine.

Microsoft .Net Framework 4 must be installed.

We must be able to log on to the server as the Service Account. We install the software when logged on as the Service Account, thus administrative privileges are needed. We need the Service Account’s domain and password during the installation of the software.

**Expected attendees:** Exchange resource

**Time usage:** approximately 1 hour

## Preparations and installation - BufferTime

**Description:** The Concierge Services BufferTime Service is a Windows Service that ensures that meetings are added a buffertime at the start and end of meetings.

We need to create a Service Account with Full Mailbox Access to the resource’ mailboxes in the organization. The Service Account must have a designated mailbox.

The software is not supposed to be installed on the Exchange server directly. It should be installed on a different Windows Server based machine.

Microsoft .Net Framework 4 must be installed.

We must be able to log on to the server as the Service Account. We install the software when logged on as the Service Account, thus administrative privileges are needed. We need the Service Account’s domain and password during the installation of the software.

**Expected attendees:** Exchange resource

**Time usage:** approximately 1 hour

## Preparations and installation - BOOKINGCENTER

**Description:** The Concierge BookingCenter module is a service used to offer individual employees a centralized management of resources and booking of these.

Concierge BookingCenter can work together with other Concierge Services modules as well as a single application

Concierge BookingCenter consists of a webservice that is installed on an IIS (Internet Information Services) server and a client (as an independent application or as an Outlook add-in).

The client application uses the webservice for viewing and managing resources. Therefore, it is not the individual user that is assigned rights to the resources, but the user account which the webservice is running under

We need to create a Service Account with Full Mailbox Access to the resource’ mailboxes in the organization. The Service Account must have a designated mailbox.

The software is not supposed to be installed on the Exchange server directly. It should be installed on a different Windows Server based machine.

Microsoft .Net Framework 4 and 3.5 must be installed.

We must be able to log on to the server as the Service Account. We install the software when logged on as the Service Account, thus administrative privileges are needed. We need the Service Account’s domain and password during the installation of the software.

**Expected attendees:** Exchange resource

**Time usage:** approximately 1-2 hour

## Implementation - Day TWo

## Preparations and installation - DISPlay

**Description:** Concierge Display is a software product enabling organisations to show MS Outlook/Exchange meeting data on display monitors located at the individual meeting rooms, at a meeting hall and at the reception area.

The display monitors can be touch sensitive which allows the users to interact with Concierge Display to book meeting rooms directly from the display monitor.

Concierge Display is in fact just a web application, which means that the individual display monitors behaves like standard internet clients using an internet browser (currently MS Internet Explorer is the preferred browser).

On a web server the actual Concierge Display software must be installed and configured. When the monitors request data, the server application retrieves the requested information from the MS Exchange server found in the organisation.

We need to create a Service Account with Full Mailbox Access to the resource’ mailboxes in the organization. The Service Account must have a designated mailbox.

The software is not supposed to be installed on the Exchange server directly. It should be installed on a different Windows Server based machine.

Microsoft IIS 6.0 or newer must be installed.

Microsoft .Net Framework 4 and 3.5 must be installed.

We must be able to log on to the server as the Service Account. We install the software when logged on as the Service Account, thus administrative privileges are needed. We need the Service Account’s domain and password during the installation of the software.

**Expected attendees:** Exchange resource

**Time usage:** approximately 2 hour

## Preparations and installation - Reception

**Description:** The Concierge Reception is an add-in to Outlook that gives receptionist information about guests and the meetings they attend.

We need to configure the settings for the module and then grant access for appointed employees in the Concierge Account.

We must be able to log on as the Concierge Service Account, Concierge. We install the software when logged on as a receptionist user, thus administrative privileges are needed. We need the names of the reception employees during the installation of the software.

**Expected attendees:** Deployment/Windows Desktop resource

**Time usage:** approximately 1 hour

## Preparations and installation – Reception Self-registration

**Description:** The Concierge Reception Self-registration Software makes it possible for guest to make selfregistration when arriving to reception area on a windows PC (info terminal) with the running software. Then a label with guest information can be printed.

We need information about the connected labelprinter. We also need a word document in the right format as the labels, with the information and logos that the customer wants.

The software is installed on a worksttion for sole purpose to work as guest-registration.

We install the software when logged on as a receptionist user, thus administrative privileges are needed..

**Expected attendees:** Deployment/Windows Desktop resource

**Time usage:** approximately 2-3 hours

## Preparations and installation –Web module

**Description:** The Concierge Web module makes it possible to add and change catering orders on existing meetings, thru a web interface.

The software is to be installed on a server. This can easily be the same server as other Concierge server modules.

**Expected attendees:** Deployment/Windows Desktop resource

**Time usage:** approximately 1 hour

## Implementation - Day Three

## Preparations and installation - Export

**Description:** The Concierge Export module is an add-in to Outlook that gives the user with the module installed the opportunity to export executed orders from the Service Units to a file which can be loaded into the customers financial system.

The customer is requested to describe how much information users should add when ordering services, and with which rules of validation. The customer must also describe how the outfile of the exportfuntion should be. Format, content, etc.

The addin should only be installed on users than shoud control the function of exporting the financial orders.

**Expected attendees:** Deployment/Windows Desktop resource and cooperation with financial department.

**Time usage:** Approximately 5-15 hours depending on the requirements. Most of this time usage can be done in advance before the actual installation date and parallel with other parts of the installation.

## Training: creating Concierge Masterdata

**Description:** Creating masterdata. We will sit with 1-2 resources and create the organization’s masterdata in the system. Please ensure that they have all information ready. I.e. names of all relevant meeting rooms, information/descriptions of all meeting rooms. We also need the names/e-mail addresses of the Service Units. We need the product range(s) of all relevant Service Units. This includes product prices, descriptions and delivery rules (also including which rooms are served).

**Expected attendees:** 1-2 appointed Concierge Masterdata administrators.

**Time usage:** approximately 2 hours.

## System presentation for the standard user

**Description:** We connect our laptop/pc to a projector and make a swift presentation of the different functions.

**Expected attendees:** The expected Concierge users, project manager

**Time usage:** approximately 1-2 hours (depending on the numbers of questions etc. If nobody asks a single question, it will take around 45 minutes).

## System presentation for the Service Unit user

**Description:** We connect our laptop/pc to a projector and make a swift presentation of the different Service Unit employees.

**Expected attendees:** The expected Concierge users from the Service Units, project manager

**Time usage:** approximately 1-2 hours (depending on the numbers of questions etc. If nobody asks a single question, it will take around 45 minutes).

## Summing up:

**Description:** If some changes need to be made before we leave, we will do it here.

**Expected attendees:** Practically everyone who has been in the process during the implementation/training days.

**Time usage:** Depends on the feedback

## checklist (KRISTIANSTAD KOMMUN tasks)

## Project scope

* Identify which countries and sites are in scope of the project.

## Stakeholders

* Who are the stakeholders of the Concierge Services system?

## Project staffing

* Identify the project’s project manager.
* Identify the project’s Outlook / Exchange technicians.
* Identify the company’s education managers.
* Identify a group of intended super users. It is common behavior to pick key people of the most meeting heavy units.
* Identify the desired Masterdata Administrators for Concierge Services. It is common practice to appoint 2 IT-minded persons from the company.

## Service units

* Identify which service units exist for every site.
* Are the service units external companies?
* Ensure that every service unit has its own e-mail address in the company’s Outlook / Exchange environment.
* Ensure that each service unit has access to a computer or alternatively; identify the persons/functions that are supposed to act link between the customer and the service unit.

## Range of products

* Create lists containing the range of products of every unique service unit.
* Write down everything regarding productname, price, description, supply restrictions (e.g. ”Steak” cannot be ordered for Conference Room A), the product needs to be ordered before a given time of day etc.

## Concierge user mailbox

* Create a user mailbox with Displayname and Alias ’Concierge’.
* Make sure the user mailbox is visible in the company’s Outlook address books.

## Required service account & list of users

* Create a user account for the Concierge Mobility Service service.
* The user account must have its own e-mail address.
* The user account must be visible in the company’s Outlook Address books.
* The user account must have Full Mailbox Access to the mailboxes of every Concierge user of the company.
* Create either an Active Directory Security Group or a Distribution List containing every intended Concierge user as member.

## Windows Server

* Identify a Windows Server based server on which the Concierge Mobility Service will be installed.
* The minimum server version is Windows Server 2003.
* Microsoft .Net 4 Framework must be installed.
* The service account created in 1.7 must be granted administrative privileges on the Windows Server.
* Microsoft Exchange Server MAPI Client and Collaboration Data Objects must be installed on the Windows Server.

## Meeting rooms and other Exchange resources

* Create all the company’s meeting rooms as Room Mailboxes.
* Identify which meeting rooms/resources cannot be booked directly.
* Identify which meeting rooms/resources need acceptance before the meeting room/resource can be booked.

## Meeting room/resource metadata

* Create lists containing the fixed equipment in every meeting room/resource.
* Create lists containing number of seats, room/resource description, contact person, link to a photo of the meeting room/resource.
* Create lists containing possible table settings for every meeting room.

## Floorplans / Hot desk plan / parking space overview

* Provide Fischer & Kerrn with plans (PDF, GIF, JPG etc) where the bookable meeting rooms / Hot desks are marked e.g. with a red dot.
* Provide Fischer & Kerrn with plans (PDF, GIF, JPG etc) where the different parking spaces are marked e.g. with a red dot.

## Networkshare

* Identify a network share, where floor plans (GIF,JPG) and Concierge Report templates (XSLT files) can be placed.
* Ensure that all service unit users have Read access to the Concierge Report templates.
* Ensure that every user has Read access to the floor plans.

## Other preparations for the installation

* A Microsoft Windows based computer is needed to be able to test Concierge Services.
* The Office pack must be installed.
* Microsoft .Net 4 Framework must be installed.
* It must be possible to install software on the computer.
* Identify which user will be logged on to the computer during the installation, as the test will also be conducted in this user context.