1. Background

In Fall of 2014, CCIT proposed a tech fee for signing a campus license agreement with Microsoft. The proposal was primarily driven by the cost of upgrading Office licenses in labs and student requests for Office and Windows licenses. The tech fee was approved and in June of 2016 a three-year contract was signed, and Office 2016 was deployed to all the labs almost immediately. In November 2016 CCIT leadership and staff decided that providing Office 365 ProPlus to students should be the next priority, per the goals outlined in the original tech fee proposal. Directory synchronization and authentication are the first step to being able to provide this, as well as all other Microsoft online services, to the Mines community in a manageable way.

2. Objectives

Make Office 365 ProPlus available to all students and employees using Mines credentials before the start of Fall 2017 semester (21 Aug 2017).

3. Scope

3.1 Inclusions

- All standard Office 365 ProPlus features: Access, Excel, InfoPath, Lync, OneNote, Outlook, PowerPoint, Publisher, and Word.
- Necessary infrastructure: 3 virtual servers for running AADC, ADFS, and ADFS proxy services
- Script/process to move role data from IDM to AD
- Script/process to assign ProPlus licenses to eligible users, remove from ineligible users, and monitor license usage
- Delegation of roles to CCIT staff
- Training for CCIT staff
- Communications to students and staff regarding available features, license terms/limitations, login process, and brief installation
3.2 Exclusions

- User de-provisioning process
- Additional Office 365 services, including Sharepoint Online, Exchange Online, Skype for Business, Yammer, OneDrive for Business, etc
- Office 2016 Professional deployment to university-owned systems

4. Key Project Deliverables

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<tr>
<th>Key Deliverable</th>
<th>Acceptance Criteria</th>
<th>Approval By</th>
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<tbody>
<tr>
<td>Project Charter</td>
<td>Complete and accurate</td>
<td>PPM, Sponsor</td>
</tr>
<tr>
<td>Project Plan</td>
<td>Complete and accurate</td>
<td>PPM, Sponsor</td>
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<tr>
<td>Data Release Approval</td>
<td>Attribute release request approved by key HR and Registrar personnel</td>
<td>CIO</td>
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<tr>
<td>Functional Pilot</td>
<td>• AADC and ADFS services up and functioning as expected</td>
<td>CCIT Systems, Identity, support teams</td>
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<td>• Pilot users able to access Office portal and Office 365 ProPlus download with Mines</td>
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<td></td>
<td>• All users able to access Office portal and Office 365 ProPlus download with Mines</td>
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<td></td>
<td>credentials</td>
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<td>• ProPlus licenses automatically assigned/removed based on student/employee status</td>
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<td>and eligibility</td>
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<td>Campus-wide availability</td>
<td>• All users able to access Office portal and Office 365 ProPlus download with Mines</td>
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<td></td>
<td>and eligibility</td>
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<tr>
<td>Internal Documentation/Training</td>
<td>Documentation published where all CCIT staff can access and provide feedback. Staff</td>
<td>CCIT support personnel</td>
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<td>comfortable with their individual roles moving forward.</td>
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5. Project Authority

5.1 Authorization

This Charter has been initiated by CCIT, who authorizes the use of organizational resources to accomplish the objectives of the project.

5.2 Project Manager

Silas Korb

5.3 Staffing

This project will mostly be comprised of technical work on Windows systems, and thus will primarily require skills in that area. Proficiency in OS provisioning, configuration, and PowerShell scripting are all required. Getting role data from Banner to AD via the IDM will be another major component, so someone with deep knowledge of the IDM system will be necessary.

- Core Team:
  - Project Manager
  - Technical Lead
  - IDM Administrator
- Internal support
  - Data owners: HR, Registrar
  - CCIT Network team
  - CCIT Security team
  - CCIT Systems/Windows team
  - CCIT Communications team
6. Management Approach

6.1 Quality Management

Quality assurance will be provided through testing with a small subset of users at every stage of deployment. The entire system should be shown to work for these users end-to-end before changes to user accounts, sync scope, or license assignments are made. If time and resources allow, trials will be performed with the end-user applications on a variety of devices to better prepare for possible support scenarios.

6.2 Risk Management

Technical risks will be managed by using best practices for system configuration and security, and by testing all changes to user accounts with a limited scope or specifically-created test accounts. Backups and snapshots of affected systems will provide an additional layer of protection. Non-technical risks like user adoption/satisfaction issues will have to be managed as they arise by the appropriate administrative persons.

7. Charter Approvals

Project Sponsor: Michael Erickson  Date: 19 Jan 2017
CCIT Representative: Silas Korb  Date: 23 Dec 2016

8. Appendix

8.1 Proposed Project Schedule

8.2 Initial Risk Assessment (list of initial risks)

- Technical
  - UPN change breaks authentication to some systems/applications
  - Adding roles breaks flow of data from IDM to AD
  - AADC attribute writeback negatively impacts user accounts
  - Any changes to user accounts subject to human error and therefore problems
  - Networking issues related to intranet vs. Internet and ADFS Proxy
  - Office License exhaustion due to increased user base or improper function of automated assignment process
  - Outages of Microsoft-controlled services
- Non-technical
  - Attribute release process
  - Poor user satisfaction
  - Increased support requests for personal devices
  - Support requests for systems over which we have no control
  - User confusion over license terms, document storage, etc
  - Loss/unavailability of resources (notably IDM administrator)

8.3 Glossary of Terms and Abbreviations

Office 365 ProPlus - full-featured, downloadable version of Microsoft Office. Differs from Office 2016 Professional Plus in that it must activate via the Internet against Microsoft servers. Users are allowed five simultaneous activations per person.

AD - Microsoft Active Directory Domain Services

AADC - Azure Active Directory Connect, a service that syncs user/computer attributes between on-premises AD and Microsoft’s online Azure AD
**ADFS** - Active Directory Federation Services, a service that allows authentication requests to be redirected from Microsoft's online portal to an on-premises AD environment

**EES** - Enrollment for Education Solutions, a subscription-based volume licensing plan from Microsoft

**IDM** - Identity Management system, provided by Aegis Identity Software at Mines