



Computing

Project Charter

Teamcenter v11 Upgrade

Version 1.5

2017-02-13

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PREPARED BY

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CONCURRENCES

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Charter Revision Log

Revision	Description	Effective Date
0.3	Metz: Add information to Matt's first draft	2017-01-12
0.4	Crawford: Candidate final draft	2017-01-12
1.0	Crawford: No EA involvement in a pure upgrade. (Per Nolan.)	2017-01-13
1.1	Campione: Various changes and comments	2017-01-13
1.2	Crawford: Reconcile versions	2017-01-17
1.3	Crawford: Feedback from Bakken	2017-02-01
1.4	Crawford: Add info from Siemens	2017-02-03
1.5	Crawford: Add info from customer divisions	2017-02-07
1.6	Bakken: Change section 10	2017-02-10

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1. Background and Project Purpose

The lab is currently running Teamcenter version 9, which will reach its end of life support from Siemens in December, 2016. We have obtained an extension from Siemens to avoid extra maintenance charges while we plan and perform an upgrade to Teamcenter version 11. Per discussions with Siemens, we will be able to bypass a version 10 upgrade and go directly to the latest release, version 11.

This project will allow us to receive continued support for current production versions of Teamcenter and NX. In addition, we will be able to use Microsoft Office 2016 instead of the older version of Microsoft Office that is the latest one compatible with our current Teamcenter–Office integration.

The upgrade will allow us to run newer versions of Java (version 8 and above) to stay synchronized with other lab-wide enterprise services.

2. Project Scope

As part of the project, newly created virtual servers will be used for Teamcenter servers and the installation will be done while the old physical servers continue to operate. Siemens has advised us to do a baseline test of database performance on a VM prior to committing to virtualizing that platform, so that decision will be made during the execution phase. During go-live we will switch over from the current production environment to the new virtual server environment.

New versions of software will be deployed, including:

- Teamcenter
- NX
- AutoCAD
- Java
- MS Office
- Teamcenter Office integration
- Content Migration Manager (CMM)
- IDEAS TDM for CMM conversions
- Teamcenter BMIDE
- MS Server OS
- Red Hat Linux OS
- Oracle

Batch files and scripts will be updated as required. New installation packages will be created, Training documents and videos will be updated. Workflows will be reviewed, tested and updated.

Accounts, access rights and licenses will be reviewed and tested.

A successful project will require the help of divisions to perform certain tasks such as

- Revise and develop training materials for Teamcenter and NX, including
 - Videos
 - PDF documentation
 - HTML based help from Teamcenter
- Create a “What’s new guide” for Teamcenter and NX
- Develop materials and train the user community on the new versions of Teamcenter and NX

- Fully test all Teamcenter / NX modules and features.
- Review, update and approve NX customer default settings. (There are over 10,000 settings.)
- Create new drawing borders using new border technology available in NX
- Test fix for “File Revise & Save As (CXPOM)” Error

These tasks will require participation commitments from AD, ND, PPD and TD.

Out of scope project tasks include:

- Deployment of Active Workspace
- Deployment of new Teamcenter modules (example; deploying engineering change management)
- New requirements for existing functionality (example; new features for electronic signoff)
- Schema changes or additions to existing production environment once upgrade begins

3. Project Objectives

In order to maintain vendor support and to enable new features, the project will deploy the new version of Teamcenter and update other software and materials as needed. The project intends to maximize operational continuity by building new installations on new servers. Existing user computers will have Client-side installations performed over go-live weekend.

The Enterprise Engineering Applications group of CCD with assistance from Siemens will perform work needed for this project. We began work in mid-January and a preliminary project plan shows completion in August of 2017, but the required effort commitments must be negotiated to make that date real.

Constraints of the project objectives include:

- Minimize customizations to the Teamcenter commercial “off-the-shelf” software to lower risks and protect investments.
- Transition to Teamcenter v11 with minimal disruption to laboratory operations and projects.

4. Project Deliverables

The project will deliver a full Teamcenter version 11 service and infrastructure, and the necessary updates to all supporting software, client-side software and training materials.

Internal project deliverables are this charter (but not a project proposal), a scope statement, a CPAF, a project plan, twice-monthly status reports, a test plan, a communication plan, a close-out report and a lessons learned document.

5. Project Customers

The set of customers for this project is exactly the set of customers for the existing Teamcenter service.

Typical customer roles include:

- Engineers
- Designers and Drafters
- Technicians
- Scientists
- Manufacturers, Fabricators and Inspection Personnel
- Procurement

6. Project Stakeholders

The key stakeholders are CCD management (Bakken, Kaletka and Campione) and the management of AD, ND, TD and PPD, who, besides being customers, will be asked to provide effort to the testing and training tasks.

Primary stakeholders are all Teamcenter users and the Enterprise Engineering Applications group, who maintain the service.

Secondary stakeholders are the Service Desk personnel and external collaborators.

7. Project Time Frame

The definition phase began in early December 2016. The planning phase began in the first week of January, 2017. Execution began in mid-January with some of the preparatory technical tasks but will begin in earnest in February. Siemens' experience is that an upgrade for a site like ours typically takes about five months, but they assume a core support staff twice the size of ours. And we have a few added complications such as electronic sign-off, which may require more time. A preliminary forecast through project planning is August, 2017, but as stated above, this is subject to resource allocations still under discussion.

8. Project Budget

This budget reflects only computing personnel time. Some effort is committed by the customer divisions to testing and training.

CS Activity Name:	ENGINEERING - Project - Teamcenter v11 Upgrade		
FTL Identifier:	CS-11213-ENGINEERING-Prj..Teamcenter v11 U		
Task Code:	53.02.32.02.03.01		
	FY2017	FY2018	Total
CS tech staff (FTE•yrs)	1.00	0	1.00
PM & BA (FTE•yrs)	0.40	0	0.40
M&S	\$80,000	0	\$80,000

9. Project Acceptance Criteria

This project is considered complete when these conditions have been met:

- Able to run Teamcenter version 11 and create new items
- Able to run NX version 11 and create new models and drawings
- Able to edit existing data from Teamcenter and NX
- Able to run the review and approve workflow to release data
- Able to output data to printing devices
- Able to create NX translation files (STEP, IGES, Parasolid, etc.)
- Able to use Citrix from remote locations to access Teamcenter and NX
- Able to perform CMM migrations
- Able to create and edit using Teamcenter Office integration with MS Office 2016

- Able to verify external collaborators can only view/edit data from projects they are members of
- Able to perform standard Fermilab searches
- Able to perform a full text search
- Able to subscribe to Teamcenter items
- Able to revise Teamcenter items
- Able to save Teamcenter items with new document numbering
- Customers' test plans have passed

10. Flexibility Matrix

	<i>Most Critical (Inflexible)</i>	<i>Moderately Critical (Adaptable / Negotiable)</i>	<i>Least Critical (Accepting / Will Concede)</i>
Scope	X		
Schedule		X	
Resources		X	

11. Project Organization

11.1. Project Team

Project Sponsor:	Jon Bakken
Project Manager:	Matt Crawford
Technical Lead:	Tony Metz
Business Analyst:	Irene Shiu
Service Owner:	Tony Metz
Project Team:	David Lowell, Tom Porter
Steering Committee:	None
Management Advisory Team:	None

11.2. Responsibilities

The Project Sponsor is responsible for obtaining organizational support and commitment of resources to the project; setting scope and providing guidance to the Project Manager and Technical Lead; and addressing obstacles, issues and concerns.

The Project Manager primary responsibilities are:

- Preparing and maintaining project management artifacts such as the charter, budget, schedule, status reports, and lessons learned.
- Coordinating project work activities
- Monitoring and reporting on progress against plans. This also includes:
 - Developing the project management plan and all related component plans;
 - Keeping the project on track in terms of schedule and budget

- Managing project scope, including overseeing Project Change Control
- Identifying, monitoring, and responding to risk
- Providing accurate and timely reporting of project metrics.
- Non-technical requirements and specifications, and related non-technical documentation
- Non-technical decisions in the project
- Coordinating the development and execution of the Project Communications Plan, in consultation with the Project Sponsor and others as appropriate.
 - In the event of a crisis or other unplanned event (for example, the backing out of a planned change), the Project Manager is responsible for approving all communications messages sent to affected parties, such as stakeholders, customers, users, and project team members.
 - Depending on the severity of the situation, the Project Manager will consult with the Project Sponsor and Technical Lead as appropriate.
 - In the event that the Project Manager is not available to approve communications, responsibility for approving communications will reside with the Project Sponsor or Technical Lead. Delegation of responsibility will be clearly defined by the Project Manager.

The Technical Lead directs the technical work necessary to design, develop, implement, test, and deliver a product, system or service that achieves the project's objectives. The Technical Lead's primary responsibilities are:

- Technical requirements, specifications, and design documentation
- Insuring that the technical design meets the technical requirements and specifications
- Service Management topics, including ITSM Service Design and Change Management, working with the service owner.
- Technical decisions in the project
- Directing the technical work performed by the project team

Project Team members responsibilities are:

- Reviewing and executing the tasks assigned to them
- Meeting the due dates of tasks as assigned
- Communicating the status of assigned items
- Communicating any issues that have a potential to impact progress

The Enterprise Architecture Group is not concerned with this project, as it is purely an upgrade of software and preserves the general form of the hardware infrastructure.

The Business Analyst is responsible for

- Creating the test plans
- Coordinating user acceptance testing
- Determining the training materials to be retired, revised or created
- Coordinating the revision and creation of training materials

12. Project Reports

The Project Manager will report status twice monthly at the CS Project Status meeting.

The Project Team will meet weekly to discuss project status, review progress against milestones and deliverables, and discuss risks, issues and concerns.