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| Project Charter |
| Request Tracker 4.4 Upgrade and Onboarding Project |

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# Project Purpose

The [RT 4.4 Intake document](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/RT44Upgrade-ProjectMgmtDocuments/RT4.4-IntakeForm.docx) also provides details.

NOTE: the term “ticket” refers to a specific piece of work (requested internally or by a client).

This project will endeavor to:

Upgrade Request Tracker (RT) from version 4.2 to version 4.4. It will including the following:

* Planning
* setting up development server
* testing
* procuring and attending training from Best Practical
* communication (including a PDAG seminar and possibly additional training options)
* completing the upgrade

Upgrade Request Tracker Incident Response to the newest version.

Work with Computer Science Computing Facility (CSCF) and Math Faculty Computing Facility (MFCF) to

* train them on RT 4.4 (2-4 of them will attend the Best Practical RT 4.4 training)
* address their RT needs (and collaborate with them on new features to meet their needs) as follows:
  + Custom roles
  + Database query for time worked (CSCF to do the work and IST-TIS to put in place for testing and eventually on live server)
  + ‘Summary’ custom field text area CSS changes (CSCF to do work and IST-TIS to implement)
  + Validation callback for warning if hostname doesn’t resolve in DNS (hostname custom field) (CSCF and IST-TIS to collaborate on this)
* work with them to onboard them to start using RT 4.4

The related business needs are:

* To take advantage of new features, to enhance the tracking of tickets and related knowledge in IST and at UW
* To take advantage of new features that will meet the needs of MFCF and CSCF
* To take advantage of RTIR distributed workflow to enhance communication and efficiency with respect to incidents in various faculties and other parts of campus.

# Scope

The description above provides what is in scope.

What is not in scope:

* Making any changes to RT for the campus during the move to RT 4.4 (other than what is absolutely required for the upgrade)
* Implementing ‘nice to have’ new features for CSCF/MFCF
  + Only required features will be implemented initially
* Project planning for CSCF/MFCF’s move to RT 4.4
  + Once RT4.4 is live with the features required by CSCF/MFCF, this project will complete

# Success Criteria

**Success of Product/Service (Scope, Requirements, Quality, Functionality)**

| Criteria for Success of Product/Service | Planned Measurement(s) |
| --- | --- |
| RT 4.4. is fully implemented with minimal impact to the campus users of RT (with only the planned on down time on April 22) | *Late in the day on April 22, RT 4.4 will be live and all functionality that existed before the upgrade is working in RT 4.4* |
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| Timely communications are sent to RT users on campus, to prepare them for the upgrade | See [communication plan](https://sharepoint.uwaterloo.ca/sites/IST/CS/RT/RT44Planning/RT44Upgrade-ProjectMgmtDocuments/RT4.4-CommunicationPlan.docx) |
| CSCF has the features and support from IST to smoothly move to RT 4.4 on May 1 | Required features agreed upon are working and live in RT 4.4 on or before May 1st |
| Training is provided to CSCF and MFCF staff in advance of May 1st | Training is completed in April and questions answered. |

# Constraints

* Staff resources are limited but should be adequate for scope
* Budget is adequate

# Dependencies

* This project is dependent on
  + the collaboration with CSCF and MFCF staff to provide input on required features and assistance with configuring and developing new features and configurations for RT4.4.
  + Daniel (CSCF) to do development for new features
  + consulting help from Best Practical (already procured)

# Budget

Budget is adequate and has been spent (as of March 14, 2017) on the following

* Best Practical training (in house)
* Best Practical consulting hours

# Deliverables and Milestones

\*\*WBS below or link to RT master ticket with dependencies instead.

See excel file

# Resource Roles and Responsibilities

**The team that will work on this will include 1-2 staff from IST TIS, 2 staff from IST Client Services, 1 staff from IST Information Security Services and ~4 staff from CSCF and MFCF. (The CSCF and MFCF staff will only be involved in the training and the work related to onboarding to these groups to RT).**

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# Approvals

This charter formally authorizes the **Request Tracker 4.4 Upgrade and Onboarding Project** project, based on the parameters outlined and the information known at the time of project initiation. It is understood that some of this information may change during planning and execution and, if so, will be discussed and documented through proper project change management processes. This approval indicates an acknowledgement between the Sponsor and Project Manager of the project’s parameters, and authorizes the Project Manager to proceed with forming the Project Team and project kickoff.

Sponsor Authorization: Bob Hicks and Lisa Tomalty

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Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Project Manager Acknowledgement: Lisa Tomalty

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Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# Revision History

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| Change Made By | Date Change Made | Details of Change | Change Reviewed/ Approved by | Date change reviewed/ approved |
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