

# Upgrading from microsoft outlook 2003 to microsoft outlook 2007 into a business b...

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## **Background Information and Statement of Need**

XY organization has been one of the leading project Management firms for a very long period of time. The organization has several departments which need to be in constant communication all the time. The organization uses Microsoft outlook 2003 for handling communication activities within the organization. Microsoft Outlook is a personal information Manager that is mainly used for handling e-mails. However, it can also be used as a stand alone application and can work with Microsoft Exchange Server for sharing information. The version of Microsoft Outlook (MS Outlook 2003) used by the organization is outdated and needs to be upgraded to a more recent version of Microsoft Outlook (MS Outlook 2007). The Microsoft Outlook 2007 has more capabilities and functionalities as compared to the older versions of Microsoft Outlook.

The Microsoft Outlook 2007 has very many advanced features as compared to the 2003. The features make communication easier and more interesting. The new advanced features and improved capabilities of the Microsoft Outlook 2007 triggered the management to consider upgrading from the older version - Microsoft outlook 2003 to the newer version - Microsoft Outlook 2007.

Some of the strong features of Microsoft Outlook 2007 include; Ability to preview attachments which enables you to view documents without necessarily opening them. This helps in saving time and increasing productivity. It also helps in improving the security as your computer is not

exposed to harmful elements like viruses and macros. Another strong feature of the Microsoft Outlook 2007 is the new instant search feature which helps in quick allocation of data by indexing your mail.

## **Project Objectives**

The project consists of five main objectives to be achieved. Each objective will have a set of missions to be accomplished. Each objective will be achieved within a defined strict timeline and budget. The systems will not be shut down during the upgrade. However, during the final stages, most part of the organization will experience a downgrade for a short period of time when the final switching is done. There will be a simulcast period when the two sets of Outlooks will be operating concurrently. This will give the staff time to transfer their data to the new platforms before the older systems are shut down and done away with. (Benneth & Rea, 1998)

### **The objectives to be achieved are:**

#### **i. Training of the staff**

There is need to train the staff of the organization on the advantages of the Microsoft Outlook 2007 and how to use it. If the staffs are not trained then the project may not be of any benefit to the organization.

#### **ii. Hardware upgrade**

Most of the computers used by the organization have lower capabilities.

There is need to upgrade the systems and have the company data backed up.

### iii. Installation of Microsoft Exchange 2007 Server

The Microsoft Exchange Server 2007 should also be installed as Microsoft Outlook 2007 works best with this Exchange Server.

### iv. Installation of the new version of Microsoft Outlook 2007

Once the server has been installed, Microsoft Outlook 2007 can then be installed into the systems.

### v. Complete overhaul of the older systems

After the installation of the server and the Microsoft Outlook 2007, a simulcast period is allowed which enable the users to adapt to the new system. The older systems are then removed from the organization and the new ones fully utilized.

Potential risks which may prevent the plan's objective from being met on time and within budget.

There are some risks that can prevent the timely completion of the project. Such risks include resistance from the staff to accept change and incompatibility issues.

## **Mission and Goals of Project**

The mission and goals of the project include:

### i. Training

#### a. Analyze the current computer literacy level of the employees

- b. Sensitize the employees on the importance of switching to the new technology
- c. Offer training to the employees on the new technology
- ii. Upgrading the hardware
  - a. Analyze the current specifications of the hardware used
  - b. Check whether they are compatible with they can work with a Microsoft Exchange Server 2007
  - c. Check whether the computers can handle Microsoft Outlook 2007
  - d. Incase of computers which are incompatible with the new technology, then there is need for a complete overhaul.
- iii. Installation of Microsoft outlook 2007
  - a. Once the required hardware has been put in place, Microsoft Outlook 2007 can therefore be installed

## **Project (Plan) Approach**

The approach method used by the organization in implementing this project involves carrying out a study on the current situation of the organization. This involves analyzing the types of computers used by the organization in terms of their specifications, functionalities and compatibility issues. The tasks to be implemented will involve training the staff, carrying out an upgrade of the hardware and then installing the new version of Microsoft

Outlook. Analysis is very vital before beginning any project as it help the project team to know where to start from and what is expected of them.

Each stage of the project should be documented. Documentation will help in tracking the project progress. It also aids in understanding the phases of the project so that in case the team that started the project is not able to complete the project, a new team will know the flow of events and pick up the project from whichever point the project was left without any difficulty. As the process of implementing the project changes is on, the end user should be involved at every stage so that they get even a better understanding of the project and how they are likely to benefit from the installation of the project.

There is need to use a prototype before the implementation of the project. A prototype will help in determining whether the project is viable. A prototype will give the project team an insight on the impacts of the project. It will help in determining if a given project will be a success or not.

## **Project (Plan) Organization**

The project team members include:

- i. Project Owner: This is the Organization where the project is being carried out.
- ii. Project Manager: This person is responsible for overseeing the project. He/she coordinates all the activities of the project. He must have adequate

knowledge on Project Management and understand how each stage of the project is important.

iii. Software purchaser: Is responsible for acquiring the software to be used. He/she has to obtain the license for the software. He is also responsible for testing the software and ensures that it meets all the capabilities stated.

iv. Exchange Administrator: Is responsible for controlling the operation of the Microsoft Exchange Server. He coordinates its operations and ensures that it is always in operation. Must have adequate knowledge in management of Exchange servers.

v. Hardware purchaser: Is responsible for acquiring all the hardware required for the project.

vi. Software installer: Once the software for the project has been purchased, the software installer embarks on the installation job. The software installer must have adequate knowledge about the software to be installed.

vii. Hardware installer: Most of the hardware used for Exchange are complicated and need to be configured properly. A hardware installer will configure the hardware and ensure that they coordinate well with other hardware already in the organization.

viii. Computer Technicians: Computer Technicians will perform general maintenance operations and coordination of the computer system.

## **Project Evaluation and Reporting**

The project evaluation can be done through monitoring, and documentation which is obtained through constant communication amongst the various stakeholders and team members. A report is then produced by the project manager. (Kerzner, 2000)

Project reporting is a very important aspect of the project management which involves producing documentations for the different phases of the project and then presenting them to the relevant authorities. Periodic reports are created by the Project Manager and then distributed to different stakeholders and team members.

There is need for the project implementation team to be meeting regularly in order to produce a progress report which shows the progress of different phases of the project. The project manager is responsible for advising the team members on the time lines and the budget so that they work within those limits.

The project manager will also update the staff on the progress of the project and give a progress summary report. This can be done on a weekly basis. However, additional reports can be produced at the request of the Project Manager or the Chief Executive officer of the organization.

## **Project Termination**

Once all the phases of the project have been completed and testing done to ensure that they are in accordance with the specified requirement, then the



termination process can begin. For a successful termination, the following steps are followed. (Project termination, 2009)

i. Finalize installation and presentations

All installations need to be finalized when the process of implementing the project is complete.

ii. Finalize all outstanding contracts

Any outstanding contract need to be finalized.

iii. Finalize project accounting

There is need to balance all the accounting books as the project completes

iv. Transfer project responsibilities

The responsibilities held during the project need to be transferred to the organization's staff.

v. Release remaining resources

If there is any remaining resource, there is need for them to be taken back to the accounting authorities.

vi. File project reports

All reports produced during the project need to be filed and kept for future reference.

vii. Schedule annual checkups

There is need for a constant updating of the system also known as maintenance. The annual checkups need to be scheduled so as to monitor the progress of the system.

Once all the above items on the checklist have been completed successfully, then the project will be considered complete.

## **Summary**

When scheduling a project there is need to consider its viability so as to ensure that the project becomes a success and that it meets all the requirements specified. Project management is very important as it ensures that a scheduled project is completed within the time limit and within budget. There is need for a project to be divided into different subsections and then each subsection assigned to different leaders. The project manager will then oversee the whole project and keep a constant form of communication between him/her and the different leaders in different departments. This will ensure that the project is completed within time and budget.

## **REFERENCES**

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