

Relocation of UK Link Documentation from Extranet to Xoserve.com: Lessons learnt

Action 0401 – Xoserve to consider how the move from Extranet to Xoserve.com had been managed and provide lessons learnt to ensure better management for such future changes

During the UK Link Committee (UKLC) held on 9th April 2015 the move of UK Link documentation from Extranets to Xoserve.com was discussed and the above action formed. This paper aims to review how the process was managed and provide the lessons learnt for future changes.

Background of the change

Xoserve was informed by our Extranets service provider (NG) that they were unable to continue to host the site. The Extranet platform was a shared resource which would have left Xoserve alone as the sole User bearing high ongoing hosting costs. Because of these cost constraints Xoserve took the decision to switch to a new Microsoft SharePoint Online platform; this also provided a much more secure solution.

Due to resource pressures because of UK Link Replacement Programme, an internal operational group (as opposed to a project team) was formed to analyse the change. The analysis concluded that documentation could be moved onto SharePoint.

A communication was sent to UK Link Users on 3rd March to inform them of the move to SharePoint Online. SharePoint Online does not support browsers below IE8. Following representations received from the communication some Users informed Xoserve they would be unable to access SharePoint Online because of browser issues.

Xoserve took this feedback and looked to another resolution to the issue. The group recommended that as Xoserve.com was accessible to all Users it would provide a pragmatic solution to the housing of UK Link Documentation. This decision was made on 11th March with a deadline for completion of the work by 31st March.

Following the decision for UK Link Documentation to be hosted on Xoserve.com a review of the documentation was held and seven folders were found to contain information that could not be made available in the public domain. It was decided to migrate, these documents onto SharePoint Online and provide copies via email to all Users unable to access SharePoint Online.

Feedback

Users have reported that during this change they received mixed and confusing messages, reduced notice periods and issues upon implementation. This infers that the change was not managed as well as it could have been and a request (Action 0401) was made for this change to be reviewed.

Appendix 1 shows the timeline of communications sent.

Detailed in appendix 2 is the table with the specific comments submitted from UKLC members.

Internal Review Outcome

An internal review has found several factors that contributed to the issues experienced by customers as a result of this change. These include:

- Due to resource problems exacerbated by the UKLP there was no project manager overseeing the project and therefore a full impact assessment was not undertaken
- With no clear project direction, the operational group formed were not aware of the timeframe and governance associated with UKLC

- The group undertaking the change was not aware that there are several owners of the information held within UK Link Documentation and therefore did not understand the implications of moving them onto Xoserve.com. This is confidential data and needs to be password protected.
- There was limited timescales for alternative solutions, planning and communicating
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Lessons Learnt

- Where possible Xoserve should seek options to host documentation and avoid reliance on external service providers
- Changes are best led with clear project teams and a defined project manager role. In future changes should be handled by a project team.
- During this change there was a lack of understanding regarding the governance of UKLC. Awareness sessions are required to understand UKLC timeframes – UKLC Master Classes have been introduced across the company to increase knowledge and understanding of UKLC and the governance surrounding it. We have also posted details of the UK Link Committee processes on our Intranet site.
- Any future changes to UK Link Documentation will be internally reviewed to ensure the relevant teams identify the files that will need password protection at the outset of a change.
- In the future all change milestones will be planned and communicated with defined timeframes, with all solutions being considered and input solicited from stakeholders with clear communication channels.

Appendix 1: Timeline of Communications issued

Date	Reference	Title	Content	Audience	Sent by
02/02/2015	NA	FAO of All Users of the UK Link Documentation	Email Communication to all UK Link Documentation users on record. All Users requested to indicate by voting buttons whether access was required to begin the process of receiving a user name and password for SharePoint Online.	All Registered UK Link Documentation Users	Extranet.admin account
Between 02/02/15 - 18/03/15	NA		“You should have received an automated email advising you of your username and password. Please note, UK Link Documentation will be moving to a new platform in March which is Sharepoint Online. This will not be accessible to any users who are using anything below Internet Explorer version 8. Therefore we recommend that you begin discussions with your IT support teams now to make sure you have a suitable browser for viewing this site (suitable browsers include Google Chrome, Safari & Firefox)”	Those who voted yes to the email above received an email advising they should of received a username and password	Extranet.admin account
03/03/2015	1381 - LH - SN	UK Link Documentation Network Companies and Gemini E-training extranets to a new SharePoint Online platform	Communication to UKLC members informing them of the planned move to SharePoint and an invitation for representations	All UKL Comm Distribution Lists	UKLink. Manual account
06/03/2015	1383 - LH - SN	Revised UK Link Documentation Network Companies and Gemini E-training extranets to a new SharePoint Online platform	As 1381 advised Users they required IE9 or above, 1383 was revised to inform Users the requirement was IE8 or above.	All UKL Comm Distribution Lists	UKLink. Manual account
11/03/2015	1384 - LH - SN	UK Link Documentation Extranet moving to Xoserve.com	Following representations received that some Users were not on IE8 the proposed solution was amended to move the documentation onto Xoserve.com. The	All UKL Comm Distribution Lists	UKLink. Manual account

			communication 1384 was made to inform Users of the decision to move the UK Link Documentation onto Xoserve.com.		
23/03/2015	NA	UK Link Documents Comms	Communication informing Users of the move to Xoserve.com and no need to access SharePoint or a requirement for a password	All Registered UK Link Documentation Users	Extranet.admin account
27/03/2015	NA	Demand Estimation material currently on UKLink Documentation	Email informing all Demand Estimation document users that the Demand Estimation folders will continue to be placed on SharePoint as they hold confidential data and require password protection	DESC (Demand Estimation) distribution list	Demand.estimate account
30/03/2015	1390 - RH - SN	UK Link Documentation Extranet moving to Xoserve.com – outage notification	Communication regarding the move from UK Link Docs to Xoserve.com causing a five hour outage. Detailed the move of the seven folders requiring password protection to SharePoint and the workaround should any Users be unable to access SharePoint	All UKL Comm Distribution Lists	UKLink. Manual account
01/04/2015	1392 - RH - SN	1392 - RH - SN - UK Link Documentation Extranet moving to Xoserve.com	Communication to inform Users the move was successful and to reiterate the folders that moved to SharePoint	All UKL Comm Distribution Lists	UKLink. Manual account
16/04/2015	NA	Publication of Quarterly MOD 450b report (Small Supply Point Appeals)	Email regarding the publication of the annual report 450b with a reminder that this is published on SharePoint and links with how to access the site and how to obtain a username and password	AQ Contacts distribution list	AQQ account

Appendix 2: Specific questions from UKLC

<p>Confusing communications in regards to use of SharePoint – mixed messages.</p>	<p>As indicated in the timeline there were amendments to the proposed solution for the Extranets move based on the Representations received following the UKLC communication 1381 issued on 03/03/15. As a result of Users being unable to access SharePoint due to their system compatibility it was deemed necessary to move documentation to Xoserve.com to ensure it captured all Users.</p> <p>Subsequent to the move some folders on Extranets were deemed to be confidential and could therefore not be held within the public domain. These seven folders have been moved to SharePoint to enable password protection. Where Users cannot access SharePoint a workaround has been developed for Xoserve to supply the relevant documentation.</p> <p>We acknowledge the communications at times were confusing, as a result of the solution being amended at short notice to ensure it was appropriate for all Users.</p>
<p>Not all users were contacted regarding need to register to continue access – if we had been provided with a list of current users we could have managed this more effectively. This was requested on more than one occasion but not received until the move had taken place.</p>	<p>All Users that were registered on the Extranet were contacted through the Extranet Admin team to confirm they required continued access. We acknowledge that the list of all users would have been beneficial to your Shipper organisation to allow for internal readiness.</p> <p>Internally we were required to liaise to ensure the list could be provided. There was confusion between internal teams who was going to provide this list which lead to delays. We accept that this could and should have been provided sooner.</p>
<p>One of our users registered interest and was provided a new logon/password which seemingly is not required.</p>	<p>The username and password was sent to the User on 9th March when SharePoint Online was still in scope as the solution. Unfortunately all Users could not access SharePoint Online and the decision was made to host the documentation on Xoserve.com on 11th March. Therefore the logon provided was no longer required. We are sorry if this caused any confusion.</p>
<p>No clear instructions were provided by email to all users on how to set up access (or even access secure documentation)</p>	<p>The solution changed with short notice and user guides were not created for all the solutions. A user guide was created for SharePoint Online and placed on the 'Extranet Secured Sites' section on the website for Users accessing the Gemini E- Training, Networks documentation and the UK Link Secured site. For future changes we will ensure that user guides are developed and communicated in advance.</p>
<p>Screen shots in presentation provided were out of date one day after implementation</p>	<p>As with previous comments the solution was amended which meant the screenshots for the UK Link Documentation move were outdated upon implementation. The screen shots should have demonstrated that UK Link Documentation had been moved onto Xoserve.com</p>

<p>Not enough notice was given nor impact assessment on Shipper organisations</p>	<p>The UKLC governance was not considered during the planning of the move of documentation. As the change was not handled by a project team there was no impact assessment and no awareness of the need for UKLC approval. It was incorrectly assumed that the move of documentation to SharePoint would have limited impact on Users. Due to this, the correct notice period was not given.</p> <p>We have introduced master classes and sent out communications to inform internal colleagues of the guidelines for UKLC; this includes timeframes and guidance for better assessing change on Users. Future changes should have a full impact assessment undertaken and changes raised with Shipper organisations in a timely manner.</p>
<p>No test link was provided for us to confirm whether we could support new platform resulting in Content filter issues at our end</p>	<p>This is something, Xoserve will consider in the future when implementing changes relating to new platforms.</p>
<p>Link to secure documentation was not working upon implementation</p>	<p>As soon as this was brought to our attention the link was fixed within five minutes and we offered to send through the documentation via email as an interim solution.</p>