Project Charter
Bridgewater State University
Information Technology

Web Search 2.0

Project ID: 307427

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Contents

Section 1. Project Overview

1.1   Problem Statement

Describe the business reason(s) for initiating the project, specifically stating the business problem

Bridgewater State University uses two Google Search Appliances (GSA) to provide federated search capability to the main BSU website, intranet, and other connected websites. The GSA box is a hermetically sealed piece of hardware that delivers a Google-like solution in an on-premises model. The GSA's allow BSU to use Google technology to search all of our internal documents while providing campus users a familiar search experience.

Google announced in 2017 that they were going to be deprecating the Google Search Appliance (GSA). The GSA product is no longer for sale to new customers and the license renewal for Bridgewater State University expires on August 11, 2018. After that date, the GSA will simply stop working. BSU must identify and implement a replacement solution for the GSA's prior to the August 11 expiration date.

1.2   Project Description

Describe the approach the project will use to address the business problem.

Bridgewater State University has researched a wide range of replacement solution providers and has engaged with a company named SearchBlox to implement a new search solution that is flexible, scalable, and secure to replace the existing Google Search Appliances. SearchBlox will design the solution for an on-premise installation using existing BSU infrastructure and provide consulting services for the installation, setup and configuration of the SearchBlox solution. SearchBlox will then migrate our existing Google Search Appliance configuration and collections to the new SearchBlox environment. The design will include one production "index" server and two production "search" servers that are redundant and load balanced using BSUs hardware load balancer. A test environment consisting of one "index" server and one test "search" server is also included in scope and shall be configured identical to the production environment by SearchBlox. Consulting services include a like-for-like configuration from the GSAs to the SearchBlox solution which includes the SharePoint Connector customization and integration for user level security trimming in the SharePoint 2010 environment. After this initial setup and configuration is completed, BSU will conduct extensive testing to insure that the new search solution performs as expected. The new solution will be completely installed, configured, tested and deployed to production by August 1, 2018.

1.3   Project Goals and Objectives

Describe the business goals and objectives of the project. Refine the goals and objectives stated in the Business Case.

The goals of this project are:

- Implement a new federated web search solution that is flexible, scalable, and provides equivalent or greater functionality to replace the Google Search Appliances.

1.4   Project Scope

Describe the project scope. The scope defines project limits and identifies the products and/or services delivered by the project. The scope establishes the boundaries of the project and should describe products and/or services that are outside of the project scope.

This Project Includes
Finalize the SearchBlox SOW
Provision the on-premise server infrastructure (Test and Prod) environments
Design and configure any network infrastructure requirements i.e. IP Addressing, VLANs, Load Balancer, & firewall rules.
Migration of the GSA configuration to SearchBlox Test and Prod environments. Includes all search connectors, key words, SAML bridge, and security trimming.
Development of a detailed project communication plan
Creation of a comprehensive test plan to verify that the solution works as designed (i.e. security trimming and other functions work)
Benchmarks for performance testing
Update all web search locations including dev/test (where applicable) with the new search template code.
Customization and branding of search page results to match BSU look/feel
Update all website search locations to point to SearchBlox (go-live)

This Project Includes
Decommissioning of the GSA's.

This Project Excludes
Three month license/support GSA extension quoted by Onix Networking. A change request shall be submitted in the event a GSA extension is required.

There is no future scope identified with this project. When the agreed upon deliverables are received and approved, this project will be deemed complete.

1.5   Critical Success Factors

Describe the factors or characteristics that are deemed critical to the success of a project, such that, in their absence the project will fail.

- The implemented solution will provide equal or better performance and functionality than the GSA's
- A well-defined project scope and agreed understanding of the intended project outcomes
- Active management of risks, issues and timely decision-making supported by clear and short lines of reporting
- Ongoing commitment and support from the Project Sponsor and Information Technology management
- An experienced project manager with personal accountability and overall responsibility for the successful outcome of the project
- A fully committed project team with the vision and energy to design and implement high quality services.
- Roles and responsibilities of project team members and stakeholders are clearly defined.

- Planned changes are visible across the enterprise. Affected stakeholders are aware of upcoming changes and service impacts.

1.6   Assumptions

Describe any project assumptions related to business, technology, resources, scope, expectations, or schedules

- The selected vendor SearchBlox will have the skill set to design and configure the SearchBlox solution and required connectors.
- The SearchBlox solution will work with Sharepoint 2010. When we move to Sharepoint in Office 365, this will have to be reconfigured.
- BSU IT Staff will be responsible for provisioning all servers (5 in total) and network infrastructure (load balancer, firewall rules, etc.) for the on premise installation.
- The delivery of as built documentation will be included in the scope of the vendor engagement.
- Beginning in year 2, the annual cost for licensing and support will be $25,000.
- SearchBlox and BSU shall designate a person to be its "Point of Contact" for communication, coordination, final sign-off and resolution of any issues pre- and post-implementation.
- Key matches are part of the migration and will work as expected.
- BSU will not avail itself of the possible three month license/support extension quoted by Onix Networking.
- The purchase of a new SSL Certificate is required and that all searched locations will need to be updated to import and use this new certificate.
- All BSU staff members identified as members of this project team must be available to consult and/or assign a representative to this project at the times scheduled by the Project Manager.
- Vendor will begin and complete all work as defined in Section 2.4 within the specified dates without variation.

1.7 Constraints

Describe any project constraints being imposed in areas such as schedule, budget, resources, products to be reused, technology to be employed, products to be acquired, and interfaces to other products. List the project constraints based on the current knowledge today. Include any known or potential risks.

- Time Constraints:

    All work is able to be completed prior to August 1, 2018. The vendor must begin and complete all work as defined in Section 2.4 within the specified dates without variation.

- Scope Constraints:

    Scope is defined as only the deliverables identified in Section 1.4.

- Resource Constraints:

    Resources identified in Section 3.2 must be available to execute assigned tasks as defined in the project plan/schedule.

- Cost Constraints:

    Budget identified in Section 2.1 must be available to fund the project as defined in the project charter.

Section 2. Project Authority and Milestones

2.1 Funding Authority

Identify the funding amount and source of authorization and method of finance (i.e., capital budget, rider authority, appropriated receipts) approved for the project.

Project funding in the amounts described in the table below has been approved by the Vice President of Information Technology. Should any additional funding needs be identified at a later date during the duration of this project, the Project Manager will initiate a Project Change Request Form, to be submitted to and approved by the Project Sponsor(s) identified in section 3.2.

Item	Rate	Amount
3 SearchBlox Server - Production Academic/Non-Profit License	$4,000.00	$12,000.00
1 Year License with Standard Level Support (Mon-Fri 9-6 US EST)	3,000.00	$9,000.00
2 SearchBlox Server - Development/Test/QA Academic/Non-Profit License	$2,000.00	$4,000.00
GSA to SearchBlox Managed Migration Services		$25,000.00
2 day remote instructor led online SearchBlox training for Admins/ Developers		$3,840.00
Total		$53,840.00

Beginning in year 2, the annual cost for SearchBlox licensing and support will be $25,000/yr.

2.2 Project Oversight Authority

Describe management control over the project. Describe external oversight bodies and relevant policies that affect the agency governance structure, project management, and/or vendor management.

The BSU Project Manager designated in section 3.2 shall be responsible for all overall management control including project planning, execution, and coordination of all project resources for the duration of this project. The Project Manager shall manage the project in accordance with the BSU Information Technology Project Management Methodology to include:

- Develop the project charter and seek approval by the project sponsors.
- Develop and maintain the project plan/schedule in Team Dynamix.
- Conduct a formal project kick-off meeting.
- Review and approve all project task work reported in Team Dynamix.

- Submit any changes to project scope and/or project schedule for approval by the project sponsors using the IT Project Change process.
- Actively monitoring the status of each task described in the project plan/schedule and insuring all IT staff are appropriately recording effort spent on this project
- Actively monitoring all project issues and escalating as necessary.
- Conduct regular project team meetings. Provide follow-up notification from the project team meetings providing specific action items with person assignments and due dates.
- Engage project stakeholders and make them aware of the project progress thru the distribution of weekly project status reports in Team Dynamix.
- Conduct the project closeout meeting and produce a project closeout report which will be distributed and reviewed by all project participants and approved by the project sponsor.

2.3 Project Stakeholders

List all project stakeholders. Project stakeholders are individuals and/or organizations that are actively involved in the project, or whose interests may be affected as a result of project execution or project completion. They may also exert influence over the project's objectives and outcomes. The project management team must identify the stakeholders, determine their requirements and expectations, and, to the extent possible, manage their influence in relation to the requirements to ensure a successful project.

Stakeholders	Role
Ray Lefebvre, CIO and VP of Information Technology	Project Sponsor
Steve Zuromski, Associate VP	Project Oversight
Tom Groh, Director of IT PMO	Project Manager
Eileen O'Sullivan	Project Owner
Marketing & Communications	Owner of federated sites for Bridgew.edu and Microsites. Will engage in search testing.
Mike Somers, Director of Library	Owner of federated sites for Library and Virtual Commons. Will engage in search testing.

Stakeholders	Role
Mike Holbrook, Athletics	Owner of federated site for Athletics. Will engage in search testing.
Betsy Dubusque, Alumni	Owner of federated sites for Alumni. Will engage in search testing.
Betty Collins, Registrar's Office	Owner of federated site for University Catalog. Will engage in search testing.
Matt Miller, Student Involvement	Owner of federated site for In Network. Will engage in search testing.
Timo Selvaraj, Seachblox	Vendor providing the migration services and support of the new search platform
Onix Networking	Possible vendor to provided extended support to GSA's – if required

2.4   Major Project Milestones

List the project's major milestones and deliverables and the planned completion dates for delivery. This list should reflect products and/or services delivered to the end user as well as the delivery of key project management or other project-related work products.

The list below represents the current projections for this projects major milestones and deliverables. A more detailed project plan, with exact dates and resource assignments will follow approval of this project charter.

Milestone/Deliverable	Planned Completion Date
Project Discovery Started	April 1, 2018
Searchbox SOW Finalized	April 6, 2018
Project Charter Completed	April 20, 2018
Project Plan Completed	April 27, 2018.
Project Kick-Off Meeting Completed	April 27, 2018
Begin working with SearchBlox	May, 01, 2018
Communication Plan Complete	June 15, 2018
Technical Configuration Work Complete	June 15, 2018
Creation of a testing and performance plan Complete	June 15, 2018
Testing and Remediation Complete	July 1, 2018
Go Live with New Search Solution	August 1, 2018
Project Closeout Complete	August 30, 2018

Section 3. Project Organization

3.1   Project Structure

Describe the organizational structure of the project team and stakeholders.

Project Sponsor - The Project Sponsor is an executive with a demonstrable interest in the outcome of the project and who is ultimately responsible for securing the spending authority and resources for the project. The Project Sponsor will:

- Oversee high-level project progress.
- Provide input to development of project plans and deliverables.
- Provide and approve project budget and resources.
- Champions the project to provide exposure and buy-in from senior management.
- Approve the project completion.

Project Manager- The Project Manager is the person assigned by Information Technology Division to ensure that the Project Team achieves the project objectives and completes the project. The Project Manager develops the Project Charter and Plan with the team and manages the team's performance of project related tasks. The Project Manager also secures acceptance and approval of deliverables from the Project Sponsor and Stakeholders. The Project Manager will:

- Develop, monitor, and review project management deliverables and activities.
- Communicate to and receive feedback from the project team.
- Escalate and resolve issues as needed.
- Initiate project meetings in consultation with project team and sponsor.
- Develop project and implementation plans.
- Prepare deliverables for approval by stakeholders.
- Schedule and track resources.

Project Team -   The Project Team has responsibility for conducting project activities. Project Team members, as necessary, assist the Project Manager in planning the development effort and help construct commitments to complete the project within established schedule and budget constraints. The Project Team may include the subject matter experts responsible for implementing the project solution. Customers and/or Stakeholders should interact with the Project Team to ensure that requirements are properly understood and implemented. Responsibilities of project team members include:

- Timely response to all project meeting invitations by accepting or declining.
- Including the project manager on all project related communication. This will help avoid the need for the project manager to continue to ask for a status.
- Keeping the project manager informed when tasks have been completed or if there are issues or delays

- Completing assigned tasks on time or informing the project manager as soon as you suspect that there may be slippage.
- Reviewing the project plan and identifying the due dates of assigned tasks.
- Project team members from IT are responsible for entering all project work time into Team Dynamix each week no later than the close of business each Friday.

Subject Matter Expert (SME) - The Subject Matter Expert is that individual who has a high level of expertise in performing a specialized job, task, or skill within the organization. Project Managers need to work with SMEs in the research and execution phases of a project and should involve them in the technical validation of project charters and plans.

3.2   Roles and Responsibilities

Summarize roles and responsibilities for the project team and stakeholders identified in the project structure above.

Project Role	Who	University Role	Project Responsibilities
Project Sponsor	Ray Lefebvre	CIO, VP of IT	Authorizes project initiation, schedule and completion
Project Owner	Steve Zuromski	Associate VP, IT	Provides general oversight of the project
Project Manager	Tom Groh	Director, PMO	Responsible for all project management activities
Project Team Members	Eileen O'Sullivan	Director, Web Services	SME for Web Search
	Mario Elias	Web Developer	SME for Web Search
	Dave DeLutis	Director, Networking	SME for all Networking tasks
	Cuong Vu	Director, Systems	SME for all technical configuration items such as SSL
	Stacey Osborn	Communication & Training Specialist	Assist with developing Project Communication Plan

Section 4. Project Charter Approval

Approval of the Project Charter indicates an understanding of the purpose and content described in this deliverable. By signing this deliverable, each individual agrees work should be initiated on this project and necessary resources should be committed as described herein.

Approver Name	Title	Signature	Date
Raymond Lefebvre	CIO and Vice President of Information Technology		
Steve Zuromski	Associate Vice President Information Technology		
Tom Groh	Director, PMO		