Project Charter: UCI/UCSD AP Recruit

This Project Charter describes how UCI and UCSD will transform the AP Recruit application to support both campuses' requirements.

I. Goal

To transform UC Irvine's AP Recruit application into a software service for use as a pilot at UC San Diego.

II. Approval

Approvers	Affiliation	Campus	Approval Date
Shohreh Bozorgmehri	Director of Academic and Network Applications	UC Irvine	6/24/2009
Emily A. Deere	Executive Director, IT Applications Group, Administrative Computing and Telecommunications	UC San Diego	6/24/2009
Kristina L. Larsen	Assistant Vice Chancellor, Academic Affairs	UC San Diego	6/24/2009
Patricia L. Price	Assistant Vice Chancellor, Academic Affairs	UC Irvine	6/24/2009
Joan K. Tenma	Director, Academic Personnel	UC Irvine	6/24/2009

III. Project Team

Name	Email	Campus	Role
Max Garrick	max.garrick@uci.edu	UC Irvine	Project manager / Application developer
Kim Gerrard	kgerrard@uci.edu	UC Irvine	Support, Training & Quality assurance
Aldo Sarmiento	sarmiena@uci.edu	UC Irvine	Application developer
Phil Orwig	porwig@uci.edu	UC Irvine	Application developer

NACS-DCS	dcs@uci.edu	UC Irvine	System administration group
Jennifer Kramer	jkramer@ucsd.edu	UC San Diego	Project manager
AP Office	TBD	UC San Diego	Support, Training, & Quality assurance
AP Office	TBD	UC San Diego	Data and content
Ben Hodson	bhodson@ucsd.edu	UC San Diego	Quality assurance
ACT Payroll/Personnel Team Member(s)	TBD	UC San Diego	Developer
ACT Security Team Members	TBD	UC San Diego	Security Developer
ACT-UNAS	act-unas@ucsd.edu	UC San Diego	System administration and network group

Note: Jennifer Kramer to identify name and contact information for project team members from UC San Diego.

This charter will be posted to the following location and will be made accessible to all stakeholders: http://www.nacs.uci.edu/docs/agreements/ap_recruit/charter-ucsd.pdf

IV. Project Schedule Summary

The UCI/UCSD AP Recruit project began in May 2009. The project deliverable will be one Recruit application with one front end for UC Irvine and one for UC San Diego. The UCI/UCSD application is projected to be delivered to UC San Diego in Winter Quarter 2010. Provided the forthcoming scope, requirements, and project schedule do not identify significant changes, nor are there staff interruptions, UC San Diego will use the Winter Quarter timeframe to plan to train and pilot online faculty recruitments.

1. Project Component Summary

- Apply branding to UCSD AP Recruit.

- Allow access to UCSD AP Recruit from a ucsd.edu domain.

- Allow UCSD users to log in with existing Shibboleth[1] single sign-on system.

- Allow UCSD to update certain AP Recruit data using nightly data feeds.

- Allow UCSD to update user role in near real-time using web services.

- Upgrade software to latest stable versions.

- Upgrade storage capacity of database server.

- Update launch procedures to accommodate new UCSD AP Recruit sites.

- Setup UCSD AP Recruit production, training, and development environments.

- Perform quality assurance.

- Launch & announce.

2. Major Cross-campus Dependencies

Provider	Component	Recipient
UCI	Deliver data feed and web service specifications	UCSD
UCSD	Create domain for UCSD AP Recruit site	UCI
UCSD	Add AP Recruit service provider to UCSD's Shibboleth IdP	UCI, UCSD
UCSD	Deliver UCSD branded user interface content	UCI
UCI	Provide data feed and web services import mechanism	UCSD
UCSD	Deliver initial data feeds required for Recruit to operate	UCI
UCI	UCSD AP Recruit development, training and production site launch	UCSD

3. Project Constraints

- No process or functionality changes. AP Recruit will be used "out of the box".

- Only textual, image, and color changes will be made to satisfy UC San Diego's branding requirements.

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[1] Shibboleth - a standards based, open source software package for web single sign-on across or within organizational boundaries

- AP Recruit will only initiate communication with UC San Diego's Shibboleth IdP. All other data transfers will be initiated by UC San Diego.

- Without valid data provided by UC San Diego, AP Recruit will likely not function. UC San Diego is responsible for providing correct and up-to-date data to Recruit.

V. Communication Plan

1. Project Status Report

Max Garrick will send a short project status report every Monday to project stakeholders. The purpose of the status report is to summarize project progress and highlight how we are managing any newly discovered issues or risks.

The project status report will include:

- Schedule: How we are progressing compared to the project schedule.

- Risks: Any risks that have been identified and how they are being managed.

- Issues: Any issues discovered during the week and how they are being managed.

2. Weekly Cross-campus Teleconference

The purpose of the weekly scheduled cross-campus teleconference is to discuss project status, issues, risks, dependencies between campuses, change requests, and any other relevant project discussion items.

Attendees:

Name	Campus
Shohreh Bozorgmehri	UC Irvine
Emily Deere	UC San Diego
Rick Espinoza	UC San Diego
Max Garrick	UC Irvine
Jennifer Kramer	UC San Diego

3. Scope Change Requests

Changes in scope include all new functionality or changes to requirements that are not included in this document or supporting appendices. Scope changes usually change the project schedule, resource

needs, and/or performance requirements. To ensure that scope changes warrant changes to the schedule or resources, representatives from each campus must jointly approve scope changes.

These approvers are responsible for:

- Communicating with project stakeholders (AP offices, OEOD offices, developers, management, etc...).

- Weighing business value against staff costs and schedule changes.

- Refining the scope change if needed.

- Responding to project team within one week of receiving the scope change request.

Approvers: Kristina L. Larsen and Joan K. Tenma

The scope change request will include:

- Requester contact info

- Summary of change

- Change to project schedule and/or resources if approved

- "Respond by" date, after which the project team will assume no changes and proceed normally

VI. Major Project Components

1. Application Security

Application security is critical to every campus, especially for those applications that store confidential information. We understand each campus has differing standards on web application security. UC San Diego will have an opportunity to perform a security audit of the Recruit application and operating environment prior to deployment. The audit team should produce a list of security issues that must be fixed prior to pilot and those that may be fixed after the pilot.

This open and distributed approach to security will result in greater application security as more campuses adopt Recruit as their solution for managing faculty recruitment. Each participating campus will have their security objectives met, and all campuses will benefit from the union of all security objectives.

2. Authentication

The technical challenge of authenticating users across UC campus boundaries is largely solved by Shibboleth. Recruit will participate in InCommon as a Service Provider, allowing each campus to use

their own single sign-in system. UCSD AP Recruit will use UCSD's Affiliate ID to uniquely identify users who have authenticated against Shibboleth.

UC San Diego has a well-established process for using Shibboleth while UC Irvine is in the process of adopting Shibboleth. UC Irvine will seek technical assistance from UC San Diego in implementing Shibboleth authentication for AP Recruit.

3. Authorization

A person who performs an assigned function within their unit should be allowed to carry out similar actions within Recruit. UC San Diego has an existing method of defining users through a central system, including: what data they have access to, and what level of access they have to that data, and their rights in delegating access to other individuals.

Since there are no UC standards for defining access control at this point, Recruit must accommodate diverse authorization systems. Recruit will mirror relevant UC San Diego information locally at UC Irvine and provide three tools for managing user access:

1. A RESTful[2] web service for near-real-time user authorization updates.

2. A nightly data feed for ensuring information consistency.

3. An administrative tool for managing user authorization.

UC San Diego is responsible for managing access for their user base within Recruit. They may use any of the above methods for accomplishing this.

4. Data Partitioning

All Recruit data will be housed in UC Irvine data centers.

Data belonging to one campus will be stored in separate database tables than data belonging to another campus. The main reason for choosing this approach is that it provides maximum security with a minimum possibility for security bugs that may incorrectly expose confidential data from one campus to another.

While every campus will use a common code base, each campus will have their own running processes owned by different user accounts. This further minimizes the risk of data exposure across campuses.

5. Data Integration

Recruit relies on common data that flows through all campuses, including:

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[2] RESTful - Representational state transfer. Used in this context as the method of building web services that exchange information.

- Directory (user attributes)

- Schools, departments, and their hierarchy

- Faculty title & CTO[3] codes

- Faculty levels (full, associate, assistant, other, N/A)

- Specialties

- Applicant diversity information

- Authorization (discussed previously)

Recruit will provide UC San Diego systems with a nightly data import method of updating the above data. After the pilot we will reassess the need for providing near-real-time updates to this data using a web service. Each campus is responsible for defining how often data is updated and for keeping date current.

6. Branding

UC Irvine and UC San Diego have different branding requirements. For Recruit to be usable by each campus, elements of the user interface must be customizable. This includes making changes to logos, naming, terminology, policy statements, addresses, contact information, and more.

Recruit will provide the capability for customizing these user interface elements. Each participating campus is responsible for identifying what parts of Recruit's user interface must be customized, and how it should be customized.

The process for creating a UC San Diego branded AP Recruit site includes:

- Review the "Recruit Branding Packet" available in SFEE[4].

- For each highlighted area, create replacement content (including text and graphics). Content should satisfy UCSD's branding requirements.

- Upload replacement content to SFEE and email UC Irvine project manager (Max Garrick - max.garrick@uci.edu)

- If needed, meet with UC Irvine project team members to communicate needs and finalize the branding of AP Recruit.

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[3] CTO - Class Title Outline
[4] SFEE (Source Forge Enterprise Edition) - Online collaborative project management and software development software.

VII. Risks & Assumptions

- Risks:

  - As this is the first project in the UC system that will use the software as a service (SaaS) model, there will likely be unknown challenges with this approach.

  - The guarantees of the SLA will likely need to be adjusted over time.

  - The geographically separated AP Recruit project team poses challenges to communication. Both sides will communicate on a weekly basis to keep informed of project status and any outstanding deliverables.

- Assumptions:

  - UCSD will use Recruit with no functionality changes. This project is to meet UCSD's needs for a pilot of Recruit.