










Generic TRIM Physical Implementation Plan

ID	ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names	e 11 06-13
1	1	Pre-implentation Tasks	65.25 days	Mon 10-06-21	Mon 10-09-20			
2	2	Client request for TRIM implementation meeting	2 hrs	Mon 10-06-21	Mon 10-06-21			
3	3	Identify # of schedules, records, and org units	5 days	Mon 10-06-21	Mon 10-06-28	2		
4	4	Obtain quote from EWAS on import cost	2 wks	Mon 10-06-28	Mon 10-07-12	3	EWAS	
5	5	Confirm available import schedule	3 days	Mon 10-06-28	Thu 10-07-01	3	IAO, EWAS	
6	6	Draft project charter and project plan	5 days	Mon 10-06-28	Mon 10-07-05	3	IAO	
7	7	Approve project charter and project plan	5 days	Mon 10-07-05	Mon 10-07-12	6	CLIENT	
8	8	Prepare communication plan	5 days	Mon 10-07-12	Mon 10-07-19	7	CLIENT	
9	9	Prepare training plan	1 day	Mon 10-07-12	Tue 10-07-13	7		
10	10	Set up istore drawdown account (need coding) for final quote and migration activities (require # of CRMS/QRMS records/schedules/org units)	5 days	Mon 10-07-12	Mon 10-07-19	7	CLIENT	
11	11	Place ISTORE for project to install TRIM and install on mandatory applications list	2 wks	Mon 10-07-12	Mon 10-07-26	7	CLIENT	
12	12	TRIM software deployed	8 wks	Mon 10-07-26	Mon 10-09-20	11	ISM	
13	13	Provide account coding to IAO for TRIM user billing	5 days	Mon 10-07-12	Mon 10-07-19	7	CLIENT	
14	14	Milestone: Project Charter and Plan completed	0 days	Mon 10-07-12	Mon 10-07-12	7	IAO, CLIENT	
15	15	Milestone: TRIM installed	0 days	Mon 10-09-20	Mon 10-09-20	12	CLIENT	
16	16	Migration	38.88 days	Mon 10-07-19	Fri 10-09-10	10		
17	17	Upload data to FTP site (for QRMS migrations only)	1 day	Mon 10-07-19	Tue 10-07-20	10		
18	18	Schedules	11.38 days	Mon 10-07-19	Tue 10-08-03	10		
19	19	Request classification reports	1 hr	Mon 10-07-19	Mon 10-07-19	10		
20	20	Prepare classification reports (50 character & retention schedules report)	2 days	Mon 10-07-19	Wed 10-07-21	19	EWAS	
21	21	Review classification reports	5 days	Wed 10-07-21	Wed 10-07-28	20	IAO	
22	22	IAO adds missing retention schedules in TEST and PROD	2 hrs	Wed 10-07-28	Wed 10-07-28	21	JT	
23	23	Load schedules in Test	1 day	Wed 10-07-28	Thu 10-07-29	22	EWAS	
24	24	Review schedules in Test & request upload to PROD	2 days	Thu 10-07-29	Mon 10-08-02	23	IAO	
25	25	Upload schedules in Prod	1 day	Mon 10-08-02	Tue 10-08-03	24	EWAS	
26	26	Milestone: Schedule migration complete	0 days	Tue 10-08-03	Tue 10-08-03	25		
27	27	Folder Records	38.88 days	Mon 10-07-19	Fri 10-09-10	10		
28	28	Map CRMS/QRMS Org Units to TRIM	5 days	Mon 10-07-19	Mon 10-07-26	10	IAO, CLIENT	
29	29	Request accession report from Records Center Services	1 hr	Mon 10-07-19	Mon 10-07-19	10	IAO	
30	30	Review of Org Units by Project Team	2 hrs	Mon 10-07-26	Mon 10-07-26	28	IAO	
31	31	Approval of Org Units for IAO Manager	1 hr	Mon 10-07-26	Mon 10-07-26	30	IAO	
32	32	Configuration spreadsheet (data location, record type, home and owner locations) to EWAS	1 hr	Mon 10-07-26	Mon 10-07-26	31	IAO	
33	33	Add record types, org units, and locations in TEST	1 day	Mon 10-07-26	Tue 10-07-27	32	JT	
34	34	Milestone: TRIM configuration documented	0 days	Mon 10-07-26	Mon 10-07-26	32	IAO	
35	35	Milestone: TRIM configuration completed in TEST	0 days	Tue 10-07-27	Tue 10-07-27	33	JT	
36	36	Populate PROD with configuration	5.13 days	Tue 10-07-27	Tue 10-08-03	35		
37	37	Add record types, org units, and locations in PROD	1 day	Tue 10-07-27	Wed 10-07-28	35	JT	
38	38	Confirm TRIM user names, roles, idir Ids, & emails with EDRMS Help	5 days	Tue 10-07-27	Tue 10-08-03	34	CLIENT	
39	39	Milestone: TRIM configuration completed in PROD	0 days	Tue 10-07-27	Tue 10-07-27			
40	40	Folder Test Load	22.25 days	Tue 10-07-27	Thu 10-08-26	35		

Project: TRIM Physical Record Conve
Date: Wed 11-02-23

Task		Milestone		External Tasks	
Split		Summary		External Milestone	
Progress		Project Summary		Deadline	

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								06-13
41	41	EWAS prepare reports	5 days	Tue 10-07-27	Tue 10-08-03	35	EWAS	
42	42	IAO reviews reports	5 days	Tue 10-08-03	Tue 10-08-10	41	IAO	
43	43	EWAS updates as required	5 days	Tue 10-08-10	Tue 10-08-17	42	EWAS	
44	44	Milestone: Load to Test (8hr)	1 day	Tue 10-08-17	Wed 10-08-18	43	EWAS	
45	45	IAO reviews TEST data	2 days	Wed 10-08-18	Fri 10-08-20	44	IAO	
46	46	EWAS updates as required	5 days	Wed 10-08-18	Wed 10-08-25	44	EWAS	
47	47	IAO signs off on Test	1 day	Wed 10-08-25	Thu 10-08-26	42,46	IAO	
48	48	PROD migration schedule confirmed with EWAS	1 hr	Thu 10-08-26	Thu 10-08-26	47	IAO	
49	49	Communication re. CRMS/QRMS shut down	1 hr	Thu 10-08-26	Thu 10-08-26	48	CLIENT	
50	50	Folder Prod Load	10.13 days	Fri 10-08-27	Fri 10-09-10			
51	51	Upload data to FTP site (for QRMS migrations only)	1 day	Fri 10-08-27	Fri 10-08-27	49		
52	52	CRMS/QRMS Org Units set to read only	1 hr	Fri 10-09-03	Fri 10-09-03	49FS+5 days	IAO	
53	53	Confirm Production ready EWAS	1 hr	Fri 10-09-03	Fri 10-09-03	52	EWAS	
54	54	TRIM data conversion (weekends only, duration depends on volume of records)	2 days	Tue 10-09-07	Thu 10-09-09	52FS+2 days	EWAS	
55	55	Testing and data verification of production run	1 day	Thu 10-09-09	Fri 10-09-10	54	EWAS,IAO	
56	56	Milestone: Folder migration complete	0 days	Fri 10-09-10	Fri 10-09-10	55		
57	57	Milestone: TRIM Migration complete	0 days	Fri 10-09-10	Fri 10-09-10	55,26		
58	58	Training	45.88 days	Tue 10-07-13	Wed 10-09-15			
59	59	Training	45.88 days	Tue 10-07-13	Wed 10-09-15			
60	60	Project team meeting with IAO trainers	1 hr	Tue 10-07-13	Tue 10-07-13	9	IAO	
61	61	Confirm training plan	2 hrs	Tue 10-07-13	Tue 10-07-13	9	CLIENT	
62	62	Add training dates to BCPSA calendar	1 day	Tue 10-07-13	Wed 10-07-14	9	IAO	
63	63	Communicate with clients on Training dates	1 day	Wed 10-07-14	Thu 10-07-15	62	CLIENT	
64	64	IW training	2 days	Fri 10-09-03	Tue 10-09-07	57FS-1 wk	CLIENT	
65	65	Milestone: IW training completed	0 days	Tue 10-09-07	Tue 10-09-07	64		
66	66	Review of Training Evaluations	1 day	Tue 10-09-07	Wed 10-09-08	65		
67	67	IW Desktop support (30 min per TRIM user)	5 days	Tue 10-09-07	Tue 10-09-14	65		
68	68	Milestone: IW Desktop support	1 day	Tue 10-09-14	Wed 10-09-15	67	IAO	
69	69	Project Close Out	26.25 days	Wed 10-09-15	Thu 10-10-21	68		
70	70	Transition project support to EDRMS Help & Maintenance Meeting	2 hrs	Wed 10-09-15	Wed 10-09-15	68	IAO	
71	71	Prepare Physical Migration Report & Configuration	5 days	Wed 10-09-15	Wed 10-09-22	57,34	IAO	
72	72	Milestone: Physical Migration Report Complete	0 days	Wed 10-09-22	Wed 10-09-22	71	IAO	
73	73	Post Implementation Meeting	2 hrs	Wed 10-09-29	Wed 10-09-29	68FS+2 wks		
74	74	Final Project Status Report	5 days	Wed 10-09-29	Wed 10-10-06	73		
75	75	Project Recognition Activity	1 day	Wed 10-10-20	Thu 10-10-21	74FS+2 wks	IAO	
76	76	Milestone: Project Complete	0 days	Thu 10-10-21	Thu 10-10-21	75		

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