



*Ministry of Citizens' Services
Information Access Operations*

CLIENT NAME

Project Charter

**EDRMS TRIM Implementation –
Phase 1 TRIM for Physical Records**

Version:

Date:

Status:

Prepared by: Information Access Operations

1.0 Project Purpose

To give the [CLIENT] the ability to improve and strengthen their records management best practices by implementing TRIM 6.2.5 for the management of physical records.

To migrate existing [CLIENT] data about physical records from QRMS/CRMS into TRIM.

To consider this implementation project as Phase 1 of a larger project for the implementation of TRIM for electronic records management across the [CLIENT] branch or Ministry.

2.0 Background

In 2001, the Chief Information Officer (CIO) for British Columbia reiterated the need to manage all government records, physical and electronic, in a consistent manner across government, with the goal of reducing litigation risks, supporting electronic service initiatives and improving the sharing and use of information across government. Subsequently, a project was undertaken to identify and consolidate user requirements and to select a suitable Enterprise Document and Records Management System (EDRMS) that could do this. Total Records and Information Management (TRIM), produced by Tower Software in Australia, was selected as the government standard, and in June 2003, the CIO established a goal to implement TRIM across government.

To date, TRIM has been implemented in the all or part of the following ministries: Agriculture; Attorney General; Citizens' Services; Education; Finance; Forests, Mines and Lands; Natural Resource Operations; Public Safety and Solicitor General; Science and Universities; Social Development; and Transportation and Infrastructure.

TRIM is supported by Shared Services staff in Corporate Application Services and Information Access Operations (IAO).

3.0 Objectives

The objectives for TRIM implementation for [CLIENT] are:

1. To migrate information about approximately ## [CLIENT] physical records from QRMS/CRMS into TRIM.
2. To support [CLIENT] in the utilization of TRIM for the management of physical records by providing initial TRIM training, one-time desk-side support sessions, and ongoing TRIM user support.
3. To obtain information from the project to inform and support future TRIM implementation projects in the [CLIENT] branch or Ministry for the management of electronic records.

4.0 Scope

4.1 In Scope

The following activities and deliverables are considered ‘**In Scope**’ for the project:

- a) Migration of the [CLIENT] operational records schedule (ORCS) and [CLIENT] physical folder metadata currently in QRMS/CRMS into TRIM.
- b) Establish the [CLIENT] user set-up and configuration in TRIM for physical folders.
- c) Provide and deliver TRIM desk-side support and Information Worker training for # [CLIENT] records staff.
- d) Provide access to on-line TRIM training modules.
- e) Provide project management assistance and access to TRIM implementation project resources for Project Lead and Sponsor.

4.2 Out of Scope

The following deliverables are considered ‘**Out of Scope**’ and are identified to help clarify the scope boundaries of the project:

- a) Changes to the TRIM systems’ architecture.
- b) Implement advanced TRIM functionality (e.g., workflow).
- c) Integrate the use of TRIM with current business applications.

5.0 Milestones

Milestones	Date Due
Project charter and plan approved	
[Client] TRIM configuration completed	
[Client] TRIM users set up	
QRMS/CRMS ORCS (schedule) data migration completed	
QRMS/CRMS to TRIM folder data migration completed	
Information Worker folder training completed	
Information Worker desk-side support completed	
Information Worker box training completed	
Project close out report completed	

6.0 Major Deliverables

The following are the major deliverables for EDRMS/TRIM Implementation:

- a) A project charter and plan
- b) Configuration of TRIM tables
- c) Addition of [CLIENT] Information Workers to TRIM database
- d) 30 minutes of desk-side support for each [CLIENT] IW
- e) TRIM training for each [CLIENT] IW
- f) Migration of QRMS data for [CLIENT] ORCS and folders into TRIM
- g) Project close-out report

7.0 Stakeholders

The following stakeholders' interests (internal and external) must be considered.

Stakeholder Group	Represented by	Interests, Expectations, Concerns
Sponsor		Expectation: <ul style="list-style-type: none"> • Will provide direction and approve deliverables
Project Lead		Expectation: <ul style="list-style-type: none"> • TRIM training and support will be provided • Support will be provided for IW's in their new role of using TRIM for daily activities
IAO – Ministry Records Officer	Ministry Records Officer	Interest: <ul style="list-style-type: none"> • Support [CLIENT] in all records management activities
IAO - Records Management Operations	EDRMS Implementation Mgr & RM Specialist	Interest: <ul style="list-style-type: none"> • Support for TRIM implementation activities • Provide training and desk-side support Expectation: <ul style="list-style-type: none"> • Participation of records staff at meetings and training sessions • Availability of OA Solutions and EWAS staff for migration windows and activities
OA Solutions and EWAS		Expectation: <ul style="list-style-type: none"> • Availability of IAO staff to respond to migration related queries in a timely manner

8.0 Links and Dependencies

Success of this project is linked to the following:

- Active and visible executive and management support and endorsement at all levels
- Effective communications
- Availability of sufficient and dedicated resources in [CLIENT], EWAS, and IAO to support the project
- Completion of training by [CLIENT] staff
- Support for [CLIENT] Information Workers to take the time necessary to use TRIM for management of records
- Availability of EDRMS/TRIM resource materials (i.e. Intranet) and ongoing training opportunities

9.0 Risk Management

The identified risks to this project's success are:

- a) Executive support for the project is not active and visible.
- b) Lack of availability of sufficient and dedicated resources. Any changes in availability or allocation of resources, and/or changes in business unit priorities to deploy, to the project will have a significant impact to the critical path.
- c) Lack of time available to Information Workers to attend TRIM training and to use TRIM.
- d) Lack of acceptance and uptake of this application by Information Workers within [CLIENT].

10.0 Critical Success Factors

The following will be critical to the success of the project:

- a) Active and visible sponsorship by [CLIENT] Executive and Management throughout the project.
- b) Active engagement and participation by the Information Workers.
- c) Proactive communication and change management strategies delivered and applied by [CLIENT] in collaboration with the project team.
- d) User acceptance and implementation.
- e) Corporate level support within IAO for the ongoing provision of project implementation resources, training resources, and technical TRIM expertise resources.

11.0 Roles and Responsibilities

Resource Role & Name	Major Tasks / Responsibilities
Executive Sponsor	<ul style="list-style-type: none"> • Responsible for the project and promotes it • Reviews and approve project plan • Confirms and approves project scope • Acquires and ensures sufficient program resources • Ensures major objectives are being met • Reviews and approves Change Requests • Resolves issues arising from the project • Responsible for final sign-off of the project.
Project Lead	<ul style="list-style-type: none"> • Reports status, plans and issues to the sponsor as required • Works with PM to manage issues, decisions, changes, and problems to resolution • Responsible for project communications • Provide account codes to IAO for billing purposes
IAO Implementation & Project Manager (PM)	<ul style="list-style-type: none"> • Responsible for the delivery of the final product • Plans and controls all project activities • Identifies required resources • Manages business unit and external team relations • Manages issues, decisions, changes, and problems to resolution • Communicates status and project information to Project Lead • Assists Project Lead with reports to Executive Sponsor, committees, and project stakeholders as required • Ensures all project tasks and deliverables conform to quality management standards where they exist and are appropriate • Manages the project team including contributing to performance processes • Provide input into communications products • Leads business unit post implementation reviews
IAO TRIM Training Team	<ul style="list-style-type: none"> • Provides TRIM IW folder management training session • Provides TRIM IW disposition training session
IAO RM Specialist	<ul style="list-style-type: none"> • Provides desk-side configuration and support immediately following training (approx. 30 minutes in duration)
IAO Ministry Records Officer & Records Analyst	<ul style="list-style-type: none"> • Provides classification assistance • Answers general records management questions
IAO EDRMS Help	<ul style="list-style-type: none"> • Enters and enables new TRIM users • Provide ongoing support to Information Worker(s)

12.0 Project Costs

The project will be completed using the existing staff resources of both [CLIENT] and IAO. All [CLIENT] records staff will need to attend two days of Information Worker training.

The quote for the one-time migration of QRMS/CRMS data to TRIM is \$##.

There is also an ongoing operational cost to use TRIM. An infrastructure cost of \$8.50/per TRIM user/per month is charged by Shared Services.

13.0 Communications

The [Client] is responsible for developing a communications plan or requirements and disseminating relevant project information to staff. Communications are the key to moving the project forward and to provide a seamless transition to the new software.

Cross departmental communications between IAO and [CLIENT] will occur as needed using technological resources (e.g. email, live meeting) and in person meetings.

IAO will submit a final project report to all stakeholders upon completion of the project.

14.0 Approvals

Role	Signature	Date	
Executive Sponsor		DATE:	
Project Lead		DATE:	
Project Manager		DATE:	