



*Ministry of Citizens' Services
Information Access Operations*

Project Charter

EDRMS/TRIM Implementation *(Electronic Records)*

Version:

Date:

Status:

Prepared by: Information Access Operations

Change History

Version Number	Status	Date of Issue	Reason for Change	Change Control Reference
0.1	DRAFT		Initial draft	IAO, PM
1.0	FINAL		Incorporate feedback from client	IAO, PM

SAMPLE

1.0 Project Purpose

To implement TRIM version 6.2.5 for [Client], for the management of electronic records.

To consider this implementation as a pilot project for the purposes of informing future implementations across the branch or the Ministry.

2.0 Background

In 2001, the Chief Information Officer 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) was selected, and in June 2003, the CIO established a goal to implement TRIM across government.

To date, TRIM has been implemented in 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).

There are two main user roles in TRIM: Information Workers and End Users. Information Workers are responsible for opening new folders. End Users search for and save electronic documents into folders opened by Information Workers.

3.0 Objectives

The objectives for TRIM implementation for [Client] are:

1. To use TRIM for the management of electronic records.
2. To obtain information from the project to inform and support future TRIM implementation projects within the organization.
3. To ensure that the infrastructure for TRIM training is made available and utilized by the [Client].
4. To provide the [Client] with initial TRIM training, a one-time desk-side support session, and ongoing TRIM user support on version 6.2.5.

4.0 Scope

4.1 In Scope

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

- a) Establish the [Client] user set-up and configuration in TRIM for electronic folders.
- b) Provide and deliver support and training for the [Client]: # of TRIM Information Workers; and # of End Users.
- c) Provide access to on-line TRIM & Records Management training modules.
- d) 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) which would require the purchase of additional TRIM modules not currently owned by the BC government.
- c) Integrate the use of TRIM with current business applications.

5.0 Milestones

Milestones	Date Due
Project charter and plan approved	
[Client] Information management assessment completed	
Security and access approved	
[Client] TRIM configuration completed	
[Client] TRIM users set up	
[Client] staff complete generic RM training module	
Information Worker training completed	
Information Worker desk-side support completed	
Information Workers begin entering E-folders	
End User training completed	

Milestones	Date Due
End User desk-side support completed	
Project close out report	

6.0 Major Deliverables

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

- a) A Project Plan that describes what is to be accomplished, who is responsible and the duration of the work to be performed.
- b) Addition of [Client] staff to TRIM database.
- c) Configuration of TRIM tables.
- d) Regular communications to Branch staff about the project.
- e) 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	Senior Management (eg. ED or Director)	Expectation: <ul style="list-style-type: none"> • Will provide direction and approve deliverables
[Client] Team Lead		Expectation: <ul style="list-style-type: none"> • TRIM training and support will be provided • Support by supervisor(s) in Information Workers 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 Team Leads	EDRMS Implementation Mgr	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 [Client] staff at meetings and training sessions

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] 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 Worker(s), management, and End Users within the Branch.

10.0 Critical Success Factors

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

- a) Active and visible sponsorship by Branch Executive and Management throughout the project.
- b) Active engagement and participation by the Information Worker(s).
- c) Proactive communication and change management strategies delivered and applied by the Branch in collaboration with the project team.
- d) User acceptance and implementation.
- e) Corporate level support within IAO with respect to training resources, technical expertise and analytical resources to help mitigate potential risks.

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
[Client] 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 • Provides 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 RM Specialist	<ul style="list-style-type: none"> • Provides desk-side support and configuration for branch staff (approx. 30 minutes in duration)
IAO TRIM Business Analyst	<ul style="list-style-type: none"> • Prepares IM Assessment
IAO TRIM Training Team	<ul style="list-style-type: none"> • Provides half day TRIM End User sessions • Provides Information Workers training (folder and box) – 2 days • If required, provide Records Management training
IAO Ministry Records Officer & Records Analyst	<ul style="list-style-type: none"> • If required, provides Records Management orientation sessions • 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 the [Client] and IAO. All [Client] records staff will need to attend two days of Information Worker training. All other staff will attend ½ day End User training. There will be no cost for training that is delivered in Victoria. The [Client] is responsible for travel costs associated with training conducted outside of Victoria.

There is 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 the [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 six weeks after TRIM implementation.

14.0 Approvals

Role	Signature	Date	
Executive Sponsor [Client]		DATE:	
Project Lead [Client]		DATE:	
Project Manager <i>EDRMS Implementation Manager, IAO</i>		DATE:	