Project Status Report

For the Period: 1 Aug 2012 – 14 Aug 2012

Project: FGSR, EDRMS Rollout

Project Manager: Soo Fan Hoang

Project Description: Rollout the EDRMS solution to FGSR, including the implementation of an imaging solution.

Project Status:

<table>
<thead>
<tr>
<th>Estimated Completion Date</th>
<th>Cost</th>
<th>Effort (hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baselines</td>
<td>TBD</td>
<td>TBD</td>
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<tr>
<td>Current Baselines</td>
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Project Milestones

<table>
<thead>
<tr>
<th>Milestone</th>
<th>Target Start</th>
<th>Target Completion</th>
<th>% Complete (last period)</th>
<th>% Complete (current period)</th>
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<tbody>
<tr>
<td>TOTAL</td>
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<tr>
<td>1 Analysis</td>
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<tr>
<td>1.1 Business Analysis</td>
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<td>93%</td>
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<td>1.2 Document Analysis</td>
<td>--</td>
<td>11 May 2012</td>
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<td>1.3 Records Analysis</td>
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<td>2 Imaging Solution</td>
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<td>31 May 2012</td>
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<td>32%</td>
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<tr>
<td>3 Metadata Testing</td>
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<td>4.1 System Implementation</td>
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<td>4.2 Business Implementation</td>
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<td>5 End User Training</td>
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<td>6 Deploy Production</td>
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<td>7 End User Support</td>
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<td>27 Sept 2012</td>
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<td>5%</td>
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Activities Completed:
- Documentation of requirements for automating a bulk load & indexing of scanned documents.
- Completed Alfresco 4.0 upgrade, including some bug fixes.
- Setup and configuration of email dropbox module
- Bug fixes including:
  - View documents in dropbox
  - Search feature (amalgamated into one)
  - “My pooled tasks” available
  - Advanced Search now as date range vs. 1 date value.
  - Ability to tab from field to field on the ‘Add Metadata’ form.
Easily locate a folder to file the documents to (when filing documents from the ‘Dropbox’)
Document(s) remain ‘selected’ after applying metadata.

- Modified milestone dates:
  - Set up additional disk (scanned images staging area) Aug 27 - Aug 31
  - End user training session #1: Aug 27 – 28
  - End user training session #2: Sept 4 & Sept 11
  - Testing: Sept 3 – Sept 21
  - Production roll-out: Sept 17-21
  - Production go-live date: Sept 24

**Activities in Progress:**
- Installation of bulk load tool for documents.
- Initiated process for accessing PeopleSoft data to create student folders & index (for the bulk load).
- Testing of email dropbox module
- Training
  - Revising end user manual for the software, in preparation for training.
  - Established preliminary training dates
  - Established preliminary agenda for training dates
- End user support
  - Working with AICT Helpdesk and Tiered level support to prepare them for providing end user support for the production roll out.
- Prepared formal quotes for work station and scanning station upgrades
- Engaged server and storage team in regards to potential VM solution for additional disk request for scanned documents staging area

**Activities scheduled for next period:**
- Complete end user manual
- Test upload of a batch of documents; modify the index data stored for each scanned document.
- Minor revisions to folder structure.
- Revisions to document metadata.
- Work with AICT Helpdesk to equip them with the necessary tools to provide end user support.
- Complete & sign-off on business implementation plan
- Sign off work station & scanning station quote Aug 15
- Sign change request for additional disk space Aug 15
- Sign off meta data Aug 15
- Finalize Alfresco training dates and times

**Issues:**

**Notes:**
- Upcoming vacation:
  - Grace: Oct ?, Nov ?
  - Sarah: Sept 7 – 28
  - Soo Fan: Oct 19 - 27