Trust Asset and Accounting Management System (TAAMS) Rollout Plan
Tribal Guidance Document

Resources and Training available at: https://sites.google.com/a/bia.gov/taams-modernization/

New Release of TAAMS Proposed for the 1st Quarter of Fiscal Year 2016
A new release of TAAMS is expected to tentatively be deployed the 1st Quarter of FY 2016. TAAMS underwent technical upgrades to meet Department of the Interior technology and security architecture requirements required for all systems operating on the Indian Affairs network. It will be important to orient Tribal TAAMS Users to the new platform before the May 2015 release date.

The TAAMS User Community will now use a web browser to access the system using a single User ID and password logon. The look and feel of the new version will be noticeably different and provide users with easier access to data and processes.

Why am I receiving this notice?
Your tribe has entered into a Compact or Contract under Public Law 93-638, as amended, to perform Bureau of Indian Affairs' Real Estate Services and/or Land Titles and Records Office functions. Your Tribal TAAMS Users either encode documents into TAAMS or use the system for research or reports.

What is the TAAMS Rollout?
The new web based version of TAAMS requires migration of existing data to the new database over a weekend. This requires an early 3:00 p.m. MST shutdown of the current version of TAAMS on the Friday before conversion weekend. tentatively scheduled for the first Quarter of FY 2016.

The following Monday, after conversion both versions of TAAMS will be available for Verification and Validation (V&V). Regular TAAMS business activities (research, encoding, approvals) will not be allowed on V&V day. Tribal TAAMS Users from compacted and contracted tribes will be asked to compare data fields from both versions of TAAMS. Certification forms and instructions on the V&V day activities will be posted on the Google site. The new version of TAAMS will be available for encoding on Tuesday following conversion and after a successful V&V event.

What TAAMS enhancements have been made?
The Tribal TAAMS User will now benefit from the following enhancements:
- Enhanced search and retrieval capability
- A single User ID and a single password logon
- Web-based navigational features (i.e, menus, drop down lists and tabs)
- Tribes using VPN to connect to the Interior site will no longer need to cut and paste the reports. Tribal TAAMS users will be able to print to any stand alone or network printer from their desktop.

Where can I find more details about the BIA Rollout Plan?
Up-to-date TAAMS Rollout information and resources is available on the following Google sites:
https://sites.google.com/a/bia.gov/taams-modernization/

Bookmark the Google Sites for easy access to the:
- TAAMS Modernization Message Board and Calendars
- *"TAAMS Modernization Training"* link available
- BIA and Tribal Communication Plan
- Frequently Asked Questions (FAQs)
- Verification and Validation Day Certification Forms and Instructions
- TAAMS Training Nomination Form and Agreement (for new TAAMS Users)

Is Training on the new TAAMS Version available now?
Yes, Tribal TAAMS Users can visit https://sites.google.com/a/bia.gov/taams-modernization/ to view on-line "**TAAMS Modernization Training**" to become familiar with logon and navigation in the new version of TAAMS. This training is focused on *Data Entry Users* - BIA, Tribally Contracted or Compacted Tribes, *Approving Officials* - Managers responsible to approve actions in TAAMS, and *View Only Users* – Researchers.

Will Navigation Training be provided on all TAAMS Modules?
Navigation Training for each TAAMS Module is under development. Links to the training will be posted as they become available at https://sites.google.com/a/bia.gov/taams-modernization/

Will training for New TAAMS Users be available? If so, what is the process to sign up?
The BIA Division of Real Estate Services is entertaining TAAMS training requests limited to new TAAMS users. This would be the one week "Introduction to TAAMS on the Realty Modules" (title is included). Training will be scheduled as soon as possible following the receipt of a sufficient number of nominations to Martin.abeyta@bia.gov. A Training Nomination form and Agreement is available at: https://sites.google.com/a/bia.gov/taams-modernization/

Who will verify Tribal Data Migrated accurately in the new release of TAAMS?
The new release will require data to be migrated from the current version of TAAMS to the new web-based platform over a single weekend in the 1st Quarter of FY 2016.. Data for the Tribe will need to be Verified and Validated (V&V) through a side-by-side comparison of a sampling of documents on the Monday following the migration.

Will Tribal staff be invited to participate in the Verification and Validation (V&V) efforts?
You may designate your Tribal TAAMS User(s) as your official point of contact for the V&V effort. Submit the name, email and contact information to your designated BIA Regional Realty Officer.

Indian Affairs Division Chiefs in Washington, DC are responsible for identifying a data sample of documents for V&V on all TAAMS transactions nationally. It is probable the random sampling will include a representative number of documents from your tribal TAAMS transactions.

What can Tribal Leaders do to prepare for the V&V Effort?
Assign staff to participate in the Verification and Validation Day (V&V) activities. Ensure staff assigned to V&V activities are available the week prior to conversion and the following week for pre- and post-assessment activities.

Set up computers with dual monitors for Verification and Validation Day activities. V&V participants must be able to concurrently view the old and replatformed versions of TAAMS.

Encourage Tribal TAAMS Users to participate in TAAMS Modernization training available now, and all subsequent TAAMS Modernization Modules associated with their assigned TAAMS User Role as they become available.

What can Tribal TAAMS Users do to prepare for the May 2015 V&V Effort?
Tribal TAAMS Users are to (1) Refrain from running TAAMS Reports on the Friday and Monday before and after conversion weekend, unless the reports are being run for V&V testing; (2) Prepare for a TAAMS early shutdown on the Friday of conversion weekend, on or about 3 p.m. Mountain Standard Time; (3) View TAAMS Modernization training to become familiar with logon and navigation in the new version of TAAMS; and (4) View TAAMS Modernization Module Training associated with assigned TAAMS User Role as they become available.

Who are our points of contact for pre-migration questions?
The following BIA, Office of Trust Services staff will be your points of contact for pre-migration questions. Emails should include, "**Subject Line: TRIBAL TAAMS ROLLOUT QUESTIONS**". Phone calls should be followed up with an email outlining the subject.

Command Station Team

Point of Contact	Email	Phone
Charlene Toledo TAAMS Rollout Manager	Charlene.toledo@bia.gov	(505) 660-9491
Martin Abeyta 1st Alternate	Martin.abetya@bia.gov	(505) 563-3536
Tammy Harris 2nd Alternate	Tammy.harris@bia.gov	(505) 563-3221

Frequently Asked Questions (FAQs) will be consolidated and responses posted on the Google Web site under a section designated as "Tribal FAQs". Please review the BIA Communication Plan and existing FAQs to determine if your question has already been posed and answered.

TAAMS Migration and Contingency Planning

BIA will review migration data to verify totals on key data elements (such as, document counts, dollar amounts, document numbers,etc.) and make one of the following determinations by close of business on the Sunday of the data migration weekend:

- **No migration issues** were identified. An updated message will be posted on the Google site notifying Regions, Agencies and Tribes to proceed with V&V Day activities.

- **Migration issues identified and immediate corrective action is possible.** Regions, Agencies and Tribes will be notified to proceed with V&V Day activities.

- **Migration issues identified, however, they cannot be immediately corrected.** The Google site will be updated to indicate V&V Day activities will be delayed until further notice.

If the data migration is deemed unsuccessful a notice will also be posted on the TAAMS Modernization Google Site at https://sites.google.com/a/bia.gov/taams-modernization/. The existing TAAMS System will resume and an email notice will be issued to all BIA Regions the following Monday.

If a decision to delay the Rollout is made the new implementation date will be published on the Google site no later than the **end of the week** following the unsuccessful conversion.

Verification and Validation Day Command Station

A Webex Command Station will run from 7:00 a.m. to 6:30 p.m. MST on Verification and Validation Day. TAAMS Users designated to perform V&V functions will be able to share their computer screens in real time to obtain assistance on the validation process. Command Station Team Members will be available to evaluate the issues and provide the reporting party instructions on how to proceed.

V&V Day Technical Support Command Station Hours of Operation: 7:00 a.m. to 6:30 p.m. MST	
Webex + Chat Function	Click Here to Join WebEx
Conference Line	Dial 1-866-785-3924 and enter Participant Code 3592853

A Conference call line will be open on Verification and Validation (V&V) Day to respond to questions from the field in real time.   Region, Agency and Tribal staff responsible for the V&V effort are to call the conference call line and report issues.

Verification and Validation Day Activities

Any Tribal TAAMS User designated by the Tribe is considered 'on-call' for V&V activities. All on-call resources must be available the week before and after V&V day for preparation and post-V&V activities. They will be required to review migrated data from a list of sample documents provided by the BIA Central Office Division Chiefs on Monday following the weekend migration:

- **Verify and Validate (V&V)** a one-to-one record and data field comparison of records between the two TAAMS versions from a pre-selected sample provided by the Central Office.

- **Complete V&V Certifications** that no issues exist or identifying issues discovered. Report forms and instructions will be issued to Regions and Agencies (and posted on the Google site) **before conversion**.

- **Regular TAAMS business activities** (research, encoding, approvals) will not be allowed on V&V day.

The TAAMS Rollout Manager will make one of the following determinations by close of business on the **Monday following the conversion weekend:**

- **No issues** were identified. An updated message will be posted on the Google site notifying the TAAMS User Community the replatform was successful. Encoding in TAAMS will begin Tuesday.

- **Issues identified and immediate corrective action is possible.** The TAAMS Rollout Manager and CGI will resolve issues with no impact to the on-going use of the new version of TAAMS.

- **Issues identified, however, they cannot be immediately corrected.** An updated message will be posted on the Google site notifying the TAAMS User Community to return to the old version of TAAMS the next business day. The Command Station team will work together with CGI to correct the issue(s).

Who are our points of contact for post-migration questions?
A BIA Command Center including a Webex and Conference line will be operational a full week following the weekend migration event. The TAAMS Rollout Team will continue to seek user feedback on the new platform for **one week after the migration:**

Post-Migration Command Station
Days of Operation: Tuesday - Friday after Migration (Command station will also be available the following week, if necessary) **Hours of Operation:** 8:00 a.m. to 4:30 p.m. MST **Conference Line:** Dial 1-866-785-3924 and enter Participant Code 3592853

Any TAAMS User problems encountered in the new platform are to be reported immediately, or as they occur. TAAMS users are encouraged not to wait until the end of the day to report a problem. The Command Station Team will evaluate the issue and provide the reporting party instructions on how to proceed.

Field staff reporting an error(s) to the Command Center must be prepared to collect and provide sufficient information to correctly identify the data error (user or system) for investigation by the TAAMS Rollout Team and CGI. V&V User or System Errors will be collected, monitored and identified for resolution.

The TAAMS Rollout Manager will make one of the following determinations after the new version of TAAMS is implemented **during the first week of post-conversion encoding:**

- **No TAAMS performance issues** were identified. TAAMS Rollout successful.

- **TAAMS performance issues identified and immediate corrective action is possible.** Regions and Agencies will be notified on the Google site and may continue to use the new version of TAAMS.

- **TAAMS performance issues identified, however, they cannot be immediately corrected.** Regions, Agencies and Tribes will be notified on the Google site to discontinue use of the new version of TAAMS. The old version of TAAMS will be prepared for the TAAMS User Community to access the following business day. Notice and the effective date of the old TAAMS being available will be posted on the Google Site, as well as, in emails to the BIA Regional Offices and participating Tribes.

Will training manuals be updated to reflect the new appearance of TAAMS? If so, when will they be released?

New system documentation illustrating the differences between the new re-platformed TAAMS and the previous TAAMS version will be made available in the Spring of 2016. The newly re-platformed versions have not yet been updated by CGI. In the interim, existing TAAMS manuals will be available under "Help" in the TAAMS menu bar.

TAAMS Modernization Training for each of the TAAMS Modules are in various stages of development. Completed modules are available on this site now
https://sites.google.com/a/bia.gov/taams-modernization/

Timeline for Rollout
(All time zones are Mountain Standard Time zone unless otherwise noted)

When?	What?	Who?
2/24/2015	Intro to Google Site for TAAMS Rollout	Albuquerque Trust Services
2/24/2015	TAAMS Demonstration Training Available	Albuquerque Trust Services
TBD	Final User Acceptance Testing - All TAAMS Modules	Selected BIA/OST Program Staff
TBD	Verification & Validation Instructions available	Albuquerque Trust Services
Friday TBD	TAAMS System early shutdown	CGI and BIA Trust Staff
Friday-Sunday TBD	TAAMS Data Migration	CGI and BIA Trust Staff
Monday TBD	Verification and Validation (V&V) Day	Designated TAAMS Users
Monday TBD	Webex and Command Center Open for Technical Support & Feedback on New System	Albuquerque Trust Services
Monday TBD	All TAAMS (V&V) Certifications complete	Realty, LTRO
Tuesday TBD	New version of TAAMS available	CGI and BIA Trust Services
TBD	Notice of New Rollout Date if Delay Necessary	CGI and BIA Trust Services
Monday-Friday TBD	Webex and Command Center Open for TAAMS User Feedback on new System	Albuquerque Trust Services