

# Oakland County Department of Information Technology Project Scope and Approach

**Project Name: PCI – Yearly Update (2009)**

**Project ID: DE9187YR**

<b>Leadership Group: IT Steering Committee</b>			
<b>Department: Information Technology</b>		<b>Division: eGovernment</b>	
<b>Project Sponsor: Ed Poisson</b>	<b>Date Requested:</b>	<b>PM Customer No. 187</b>	
<b>Request Type:</b>	<i>New Development</i>	<i>Enhancement</i>	<i>Customer Support</i>
	<i><u>Planned System Maintenance or Upgrade</u></i>		
<b>IT Team Name: eGovernment Program Services</b>		<b>IT Team No: E</b>	
<b>Project Manager/Leader: Greg Kwasnik</b>			
<b>Account Number:</b> 19010	<b>Account Description:</b> IT - eGovernmnt Planned Maint	<b>Customer Name:</b> IT - eGovernment	
<b>Grant Funded?</b> Yes <u>No</u>	<b>Mandate?</b> Yes <u>No</u>	<b>Mandate Source:</b>	

## **Project Goal**

To perform the yearly review of the eCommerce PCI Standards and Procedures Handbook so that the County will remain Visa PCI compliant.

## **Business Objective**

By undergoing yearly PCI compliance, the County can continue to accept online payments for products and services.

### **Major Deliverables**

- Detailed Project Plan and Return on Investment
- Risk Management Plan
- Communication Plan
- Issues Logs
- Implemented PCI Changes if required
- PCI Training
- Revised eCommerce PCI Standards and Procedures Handbook
- Signed Security Policy Acknowledgement Form by all system users

### **Approach**

- Review any documented PCI changes.
- Review the IVR system and maintenance plan via remote access.
- Review the eCommerce PCI Standards and Procedures Handbook and Signoff Checklist.
- Make revisions as needed or recommended by the Payment Card Industry Security Standards Council.

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- Review and make final changes to the eCommerce PCI Standards and Procedures Handbook and Signoff Checklist.
- Obtain approval for final revision of the eCommerce PCI Standards and Procedures Handbook.
- Conduct PCI Training
- Receive the Signed Security Policy Acknowledgement Form from all the required individuals.

## **Benefits**

***See Return on Investment (ROI) Analysis Document***

Access Oakland eCommerce generated \$5.7M in gross revenues and nearly \$.5M in cost recovery revenue to the County. Without PCI compliance, the County cannot continue to accept online payments as a service provider for products and services.

If online credit card data is compromised, fines and fees in excess of \$1,000,000 could be levied by Visa against the County and its merchant bank. By undergoing certification, the County will strengthen its internal network security and increase security for online customers and transactions.

## **Impact**

**Number of Users**      Approximately 70,000 Access Oakland credit card users

**Divisions**              All divisions that process credit cards through the eCommerce engine

**Leadership Groups**    ALL

## **Risk**

**Business Environment**      Medium – Project will require some changes to existing business processes.

**Technical Environment**      Medium – Previously implemented technologies with new aspects and/or new requirements.

*Please note: Exact impact is not known to existing environments until it is determined what business and technical changes are necessary to comply with revised eCommerce*

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*PCI Standards and Procedures Handbook requirements.*

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**Assumptions**

**Staffing** IT Staffing: resources will be available for the hours indicated per the attached project plan.

Other Staffing: additional staffing will be available as follows:

<b><u>Role:</u></b>	<b><u>Name</u></b>	<b><u>Hours per Day</u></b>
Project Sponsor:	Ed Poisson	N/A

**Facilities**

- No additional space or facility resources are required.

**Technical**

- Existing technology will be utilized.

**Funding**

- Information Technology

**Other**

- N/A

**Priority** TBD

**Constraints**

- Resource Availability

**Exclusions**

- N/A

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**PROJECT PHASE AUTHORIZATION**

<b>Phase(s): ALL</b>	
<b>Total Estimated Application Services</b>	<b>Hours: Cost:</b>
<b>Total Estimated Technical Systems</b>	<b>Hours: 140 Cost: \$2,440</b>
<b>Total Estimated eGovernment Services</b>	<b>Hours: 495 Cost: \$60,390</b>
<b>Total Estimated CLEMIS</b>	<b>Hours: Cost:</b>
<b>Total Estimated Internal Services</b>	<b>Hours: Cost:</b>
<b>IT Application Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Technical Systems Division Manager Approval:</b>	<b>Date:</b>
<b>IT eGovernment Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT CLEMIS Division Manager Approval:</b>	<b>Date:</b>
<b>IT Internal Services Division Manager Approval:</b>	<b>Date:</b>
<b>IT Management Approval:</b>	
Approved:                      Yes                      No	<b>Date:</b>
Reason:	
<b>Project Sponsor Approval:</b>	
Title:	<b>Date:</b>

**PROJECT SUMMARY**

<b>Authorized Development (see above)</b>	<b>Hours:</b>	<b>Cost:</b>
<b>Preliminary Estimated Development for Future Phases</b>	<b>Hours: 635</b>	<b>Cost: \$62,830</b>
<b>Grand Total Estimated Development</b>	<b>Hours: 635</b>	<b>Cost: \$62,830</b>

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**PROJECT COMPLETION AUTHORIZATION**

<b>Customer Acceptance of Product:</b>	
Title:	Date:
<b>Project Office Review:</b>	Date:

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PCI - Yearly Update (2009) - Size Estimate (+/- 10% to 50%)

Type	ID	Task Name	Estimated Hours	Estimated Cost	Estimate Notes
<b>3</b>	<b>000000</b>	<b>PROJECT MANAGEMENT</b>	<b>216</b>	<b>\$26,352.00</b>	
Phase	1040000	PCI COMPLIANCE REQUIREMENTS REVIEW	124	\$15,128.00	
Phase	1050000	PCI AUDIT & ASSESSMENT	150	\$9,760.00	
Phase	1060000	PCI SECURITY MODIFICATIONS	90	\$6,710.00	
Phase	1070000	PCI TRAINING & SIGNOFF	55	\$4,880.00	
			635	\$62,830.00	

# Information Technology Strategic Plan Alignment

## DE9187YR - PCI - Yearly Update (2009)

### 3.1 - Provide an Enhanced Application Service Offering

- |  |   |
|--|---|
| 3.1.1 - Increase application integration through web services <input type="checkbox"/>   | 3.1.5 - Improve the quality, reliability and availability of all applications <input checked="" type="checkbox"/>   |
| 3.1.2 - Research and develop a Constituent Relationship Management (CRM) strategy <input type="checkbox"/>                       | 3.1.6 - Increase the agility and responsiveness of business units by expanding customer analytics <input type="checkbox"/>  |
| 3.1.3 - Promote mobility and location integration in business applications <input type="checkbox"/>                              | 3.1.7 - Leverage the County's Internet presence and portal as a branded consolidated point of access to all County information and services through a web browser <input checked="" type="checkbox"/> |
| 3.1.4 - Utilize ecommerce platform to offset costs and expand product offerings to customers <input checked="" type="checkbox"/> | 3.1.8 - Centralize identity and access management for all applications and content <input type="checkbox"/>   |

### 3.2 - Enhance ability to provide effective and timely customer (County departments and CVTs) service

- |   |  |
|---|--|
| 3.2.1 - Implement a centralized service center strategy to provide a single point of contact <input type="checkbox"/>             | 3.2.4 - Provide a high-quality training program to empower employees through technology <input type="checkbox"/> |
| 3.2.2 - Implement the IT Infrastructure Library (ITIL) best practice framework for IT Service Management <input type="checkbox"/> | 3.2.5 - Develop a formalized customer communication plan <input type="checkbox"/>                                |
| 3.2.3 - Define a service and support strategy that clearly identifies the IT service provided <input type="checkbox"/>            | 3.2.6 - Build IT Staff expertise through professional development <input type="checkbox"/>                       |
|   | 3.2.7 - Expand capacity through ongoing organizational review and selective outsourcing <input type="checkbox"/> |

### 3.3 - Implement a Standardized Infrastructure Strategy

- |   |   |
|---|---|
| 3.3.1 - Deliver services using a shared technology infrastructure wherever possible <input type="checkbox"/>  | 3.3.5 - Establish support cost model and SLA for all offerings outside 3.3.4 <input type="checkbox"/>                     |
| 3.3.2 - Implement a Microsoft infrastructure strategy <input type="checkbox"/>  | 3.3.6 - Improve service availability through network design and management strategies <input checked="" type="checkbox"/> |
| 3.3.3 - Implement a consolidated security strategy <input checked="" type="checkbox"/>  | 3.3.7 - Establish enhanced capacity planning and recovery management strategies <input type="checkbox"/>                  |
| 3.3.4 - Establish a standard personal computing hardware and software product suite, SLA, and replacement schedule for all County personal computers <input type="checkbox"/> |   |

**Oakland County -- PCI Yearly Update**  
Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<b>Benefits/Savings:</b>							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	0	0	0	0	0	0	0
<b>Costs:</b>							
Development Services Subtotal:	77,470	0	0	0	0	0	77,470
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	0	0	0	0	0	0	0
Infrastructure Subtotal:	0	0	0	0	0	0	0
Training Subtotal:	0	0	0	0	0	0	0
Other Subtotal:	0	0	0	0	0	0	0
<b>Annual Statistics:</b>							
Annual Total Savings	0	0	0	0	0	0	0
Annual Total Costs	77,470	0	0	0	0	0	77,470
Annual Return on Investment	(77,470)						(77,470)
Annual Costs/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
<b>Project Cumulative Statistics:</b>							
Cumulative Total Savings	0	0	0	0	0	0	0
Cumulative Total Costs	77,470	77,470	77,470	77,470	77,470	77,470	77,470
Cumulative Return on Investment	(77,470)	(77,470)	(77,470)	(77,470)	(77,470)	(77,470)	(77,470)
Cumulative Cost/Savings Ratio	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%	0.00%
Year Positive Payback Achieved							NO PAYBACK
State or Federal Mandate?							
<b>Signatures:</b>							
Benefits Reviewed By Project Sponsor	Date: _____						
Costs (including IT Resources) Reviewed By Information Technology Project Manager	Date: _____						
Costs (including IT Resources) Reviewed By Technical Services Manager	Date: _____						











**Oakland County -- PCI Yearly Update**  
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
IT Hours - New Development	Development Svcs					0									
IT Hours - System Maintenance	Development Svcs				122	0									
IT Hours - Customer Support	Development Svcs				122	0									
IT Hours - Planned Maintenance	Development Svcs		EA	635	122	77,470		x							
User Hours - New Development	Development Svcs					0									
User Hours - PTNE/OT	Development Svcs					0									
Contractor Professional Services	Development Svcs					0									
PC System - Acquisition	Hardware				814	0									
PC System - Maintenance	Hardware				2,304	0									
Notebook - Acquisition	Hardware				1,223	0									
Notebook - Maintenance	Hardware				2,372	0									
Tablet Notebook - Acquisition	Hardware				2,012	0									
Tablet Notebook - Maintenance	Hardware					0									
Laserprinter - Acquisition	Hardware				1,432	0									
Laserprinter - Maintenance	Hardware				1,104	0									
Image Workstations - Acquisition	Hardware					0									
Image Workstations - Maintenance	Hardware				3,496	0									
PC Maintenance User Owned	Hardware				2,304	0									
Printer Maintenance User Owned	Hardware				1,072	0									
Package Software - Acquisition	Software					0									
Package Software - Maintenance	Software					0									
Business Objects Access	Software					0									
Term Emulation SFTW-Acquisition	Software					0									
Term Emulation SFTW-Maintenance	Software					0									
Server - Acquisition/Upgrade	Infrastructure				8,000	0									
Server - Maintenance	Infrastructure				360	0									
Server Sftwre - Acquisition/Upgrade	Infrastructure				335	0									
Server Sftwre - Maintenance	Infrastructure					0									
Server Rack Mount	Infrastructure				400	0									
Oracle Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure				21,372	0									
Oracle Enterprise Per Processor - Year 2 and Beyond	Infrastructure				3,432	0									

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Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Project ROI?							
								Y1	Y2	Y3	Y4	Y5	Y6		
MS SQL Server Standard Per Processor - Includes Year 1 Maintenance	Infrastructure				4,725	0									
MS SQL Server Standard Per Processor - Year 2 and Beyond	Infrastructure				946	0									
MS SQL Server Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure				19,693	0									
MS SQL Server Enterprise Per Processor - Year 2 and Beyond	Infrastructure				3,939	0									
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				3,506	0									
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				701	0									
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure				13,180	0									
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure				2,635	0									
SSL Certificate	Infrastructure				845	0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
TBD	Infrastructure					0									
Internet Access	Infrastructure				180	0									
Project Staff Training	Training					0									
User Training	Training					0									

**Oakland County -- PCI Yearly Update**  
Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
IT Hours - New Development	Development Svcs						
IT Hours - System Maintenance	Development Svcs						
IT Hours - Customer Support	Development Svcs						
IT Hours - Planned Maintenance	Development Svcs	77,470.00					
User Hours - New Development	Development Svcs						
User Hours - PTNE/OT	Development Svcs						
Contractor Professional Services	Development Svcs						
PC System - Acquisition	Hardware						
PC System - Maintenance	Hardware						
Notebook - Acquisition	Hardware						
Notebook - Maintenance	Hardware						
Tablet Notebook - Acquisition	Hardware						
Tablet Notebook - Maintenance	Hardware						
Laserprinter - Acquisition	Hardware						
Laserprinter - Maintenance	Hardware						
Image Workstations - Acquisition	Hardware						
Image Workstations - Maintenance	Hardware						
PC Maintenance User Owned	Hardware						
Printer Maintenance User Owned	Hardware						
Package Software - Acquisition	Software						
Package Software - Maintenance	Software						
Business Objects Access	Software						
Term Emulation SFTW-Acquisition	Software						
Term Emulation SFTW-Maintenance	Software						
Server - Acquisition/Upgrade	Infrastructure						
Server - Maintenance	Infrastructure						
Server Sftwre - Acquisition/Upgrade	Infrastructure						
Server Sftwre - Maintenance	Infrastructure						
Server Rack Mount	Infrastructure						
Oracle Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure						
Oracle Enterprise Per Processor - Year 2 and Beyond	Infrastructure						

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Cost Detail

Cost Description	Project Cost Category	Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6
MS SQL Server Standard Per Processor - Includes Year 1 Maintenance	Infrastructure						
MS SQL Server Standard Per Processor - Year 2 and Beyond	Infrastructure						
MS SQL Server Enterprise Per Processor - Includes Year 1 Maintenance	Infrastructure						
MS SQL Server Enterprise Per Processor - Year 2 and Beyond	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere Basic Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Includes Year 1 Maintenance	Infrastructure						
Websphere ND Per Processor Single/Dual Core - Year 2 and Beyond	Infrastructure						
SSL Certificate	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
TBD	Infrastructure						
Internet Access	Infrastructure						
Project Staff Training	Training						
User Training	Training						

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Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
<b>Development Services:</b>							
IT Hours - New Development							
IT Hours - System Maintenance							
IT Hours - Customer Support							
IT Hours - Planned Maintenance	77,470						77,470
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
<i>Development Services Subtotal:</i>	<b>77,470</b>						<b>77,470</b>
<b>Hardware:</b>							
<i>Hardware Subtotal:</i>							
<b>Software:</b>							
<i>Software Subtotal:</i>							
<b>Infrastructure:</b>							
<i>Infrastructure Subtotal</i>							
<b>Training:</b>							
<i>Training Subtotal:</i>							
<b>Other:</b>							
<i>Other Subtotal:</i>							
<b>Costs Total:</b>	<b>77,470</b>						<b>77,470</b>

**Oakland County -- PCI Yearly Update**  
Return on Investment Analysis

Assumptions

Date	Assumption Description
16-Jun-08	Oakland County will remain at Level C with no external audit.
18-Jun-08	Estimated Core Hours are 370, Project hours are 635 (Includes Planning, PM, Contingency, etc)