

**Oakland County
Department of Information Technology
Project Scope and Approach**

Project Name: Probate to TCS Conversion

Project ID: DB4344TC

Leadership Group: Courts		
Department: Probate Court & Circuit Court		Division: Family Division & Estates/Mental Health
Project Sponsor: John Cooperrider	Date Requested: 10/8/04	PM Customer No.
Request Type: <i>New Development</i>		
IT Team Name: Courts		IT Team No: B
Project Manager/Leader: Mary Gaissert		
Account Number:	Account Description:	Customer Name:
Grant Funded?	No	Mandate? No
		Mandate Source:

Project Goal

To replace the current mainframe case management system for Probate Estates and Mental Health, the Microsoft Access database system for Wills, and the Paradox database system for Adoptions with the State of Michigan's Trial Court System (TCS) application by June 2005.

Business Objective

- To have in place an improved technology for processing Adoptions, Wills and Probate Estates and Mental Health records in order to comply with on-going changes in mandates.
- To have in place an improved technology that is more comprehensive and efficient in order for staff to better serve the needs of the Court and the public.
- To have in place an improved technology that provides an automated way for Adoptions and Probate Wills, Estates and Mental Health staff to generate accurate and timely statistical reports for submission to SCAO.

Major Deliverables

- Placement of communication lines between Oakland County Court and SCAO.
- Determine business changes for Adoptions and Probate Court and the need for procedural changes.
- State offices to provide complete Adoptions, Wills and Probate Court records systems, to adequately meet their needs for data capture, storage & reporting purposes.
- Perform data conversion from the mainframe Probate Estates and Mental Health system and MS Access Wills system to the new TCS System.
- Implement change from the current application to the TCS System.

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Approach

- install communication hardware/software
- Load approximately 200 workstations with emulation software
- Provide State with Probate Wills, Estates and Mental Health data for conversion
- Retire existing Probate mainframe system
- Load existing Adoptions records to read-only database on network
- Provide Bar Code Generator software to Probate Estates and Mental Health
- Provide Interfaces for FileOnQ and Legal News data

Benefits

See Return on Investment (ROI) Analysis Document

Intangible

- Eliminate steps in the current procedure thereby allowing staff to serve the public in a more timely matter.

Product/Service Accuracy

- Reduce/eliminate errors in reports/statistics by statistics being extracted directly from the system, rather than manually researching and compiling.
- Provides more structural coding for interested parties, dockets, and scheduling, thereby insuring more accurate and consistent data entry.

Product/Services Productivity

- Eliminate the process of manually obtaining data from multiple sources for State reporting. This presently can take 2-3 days for staff in researching and documenting information each quarter.

Impact

Number of Users

-Family Division-Adoptions (6-8 staff), Probate Court Staff
(approximately 60 – 80 data entry users, with an additional 100+ read only users)
-Business Office Staff (5 data entry users)

Divisions

-Family Division, Probate Wills/Estates/Mental Health
-Circuit Court Business – Data Technology

Leadership Groups

Courts/Law Enforcements

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Risk

Business Environment High –Project will negatively effect the business environment if implementation is unsuccessful.

Technical Environment High – New or non-standard technology.

Assumptions

Staffing Resources will be available for the hours indicated per the attached project plan.

The following roles and resources' availability will be as follows:

<u>Role:</u>	<u>Name</u>	<u>Hours per Day</u>
Project Sponsor:	John Cooperrider	As needed
Project Manager:	Rick Perry	2 hours/week
Data Base Administrator:	n/a	
Source System Expert:	Mary Gaissert	As needed
	Kevin Kirkpatrick	As needed
Business Analyst:	Julie Fabrizio	As needed
	Phil DeBarr	As needed
Programmer/Analyst:	TBD	TBD
Technical Resources	TBD	115 hours/project

Facilities

- State IT Offices
- Oakland County IT SDS Division

Technical

- COBOL
- Visual Basic

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Funding

-
-

Other

-
-

Priority

Constraints

-
-

Exclusions

-
-

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PROJECT PHASE AUTHORIZATION

Phase(s):		
Total Estimated Systems Development	Hours: 485	Cost: \$59,170
Total Estimated Technical Systems	Hours: 115	Cost:
Total Estimated DISC	Hours:	Cost:
Total Estimated CLEMIS	Hours:	Cost:
IT Systems Development Division Manager Approval:	Date:	
IT Technical Systems Division Manager Approval:	Date:	
IT DISC Division Manager Approval:	Date:	
IT CLEMIS Division Manager Approval:	Date:	
IT Resource Manager Approval:	Date:	
IT Resource Manager Approval:	Date:	
IT Resource Manager Approval:	Date:	
IT Resource Manager Approval:	Date:	
IT Resource Manager Approval:	Date:	
IT Management Approval:		
Approved: Yes No	Date:	
Reason:		
Project Sponsor Approval:		
Title:	Date:	

PROJECT SUMMARY

Authorized Development (see above)	Hours: 600	Cost: \$59,170
Preliminary Estimated Development for Future Phases	Hours:	Cost:
Grand Total Estimated Development	Hours: 600	Cost: \$59,170

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PROJECT COMPLETION AUTHORIZATION

Customer Acceptance of Product:	
Title:	Date:
Project Office Review:	Date:

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Niku Workbench - [Probate to TCS Conversion - Size Estimates - Phase Level]

File Edit View Tools Window Help

[All Resources]

Type	ID	Task Name	Estimate Hours	Estimate Cost	Estimate Notes
Phase	000000	PROJECT MANAGEMENT	128	\$15,616.00	
Phase	010000	SETUP PHASE	232	\$14,388.95	
Phase	020000	PROGRAMMING PHASE	202	\$24,643.96	
Phase	030000	IMPLEMENTATION	38	\$4,635.99	
			600	\$59,284.90	

For Help, press F1

Oakland County -- Probate to TCS Conversion
Return on Investment Analysis

Project Summary

Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Benefits/Savings:							
Tangible Benefits Subtotal:	0	0	0	0	0	0	0
Cost Avoidance Subtotal:	121,690	125,341	129,101	132,974	136,963	141,072	787,141
Costs:							
Development Services Subtotal:	100,000	0	0	0	0	0	100,000
Hardware Subtotal:	0	0	0	0	0	0	0
Software Subtotal:	86,700	89,301	91,980	94,739	97,582	100,509	560,811
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
Annual Statistics:							
Annual Total Savings	121,690	125,341	129,101	132,974	136,963	141,072	787,141
Annual Total Costs	186,700	89,301	91,980	94,739	97,582	100,509	660,811
Annual Return on Investment	(65,010)	36,040	37,121	38,235	39,382	40,563	126,330
Annual Costs/Savings Ratio	153.42%	71.25%	71.25%	71.25%	71.25%	71.25%	
Project Cumulative Statistics:							
Cumulative Total Savings	121,690	247,031	376,132	509,106	646,069	787,141	787,141
Cumulative Total Costs	186,700	276,001	367,981	462,720	560,302	660,811	660,811
Cumulative Return on Investment	(65,010)	(28,970)	8,151	46,385	85,767	126,330	126,330
Cumulative Cost/Savings Ratio	153.42%	111.73%	97.83%	90.89%	86.72%	83.95%	83.95%
Year Positive Payback Achieved			Year 3				Year 3
State or Federal Mandate?							
Signatures:							
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 -- Probate to TCS Conversion
Return on Investment Analysis

December 1, 2004

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier
IT Hours - New Development	Development Svcs		HR	600	100	60,000	
IT Hours - System Maintenance	Development Svcs				122	0	
User Hours - New Development	Development Svcs					0	
User Hours - PTNE/OT	Development Svcs					0	
Contractor Professional Services	Development Svcs		HR	400	100	40,000	
PC System - Acquisition	Hardware					0	
PC System - Maintenance	Hardware				2,304	0	
Notebook - Acquisition	Hardware					0	
Notebook - Maintenance	Hardware				2,372	0	
Mini Notebook - Acquisition	Hardware					0	
Mini Notebook - Maintenance	Hardware				2,196	0	
Laserprinter 1 - Acquisition	Hardware					0	
Laserprinter 1 - Maintenance	Hardware				1,104	0	
Laserprinter 2 - Acquisition	Hardware					0	
Laserprinter 2 - Maintenance	Hardware				1,208	0	
Laserprinter 3 - Acquisition	Hardware					0	
Laserprinter 3 - Maintenance	Hardware				1,860	0	
Image Workstations - Acquisition	Hardware					0	
Image Workstations - Maintenance	Hardware				3,496	0	
Terminals - Acquisition	Hardware					0	
Terminals - Maintenance	Hardware				644	0	
PRTR w/TERM ID - Acquisition	Hardware					0	
PRTR w/TERM ID - Maintenance	Hardware				1,072	0	
PRTR w/o TERM ID - Acquisition	Hardware					0	
PRTR w/o TERM ID - Maintenance	Hardware				1,072	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		ANN	1	86,700	86,700	1.030
Business Objects Access	Software					0	
Term Emulation SFTW-Acquisition	Software					0	
Term Emulation SFTW-Maintenance	Software					0	
Server - Acquisition/Upgrade	Infrastructure					0	

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Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier
Server - Maintenance	Infrastructure					0	
Server Sftwre - Acquisition/Upgrade	Infrastructure					0	
Server Sftwre - Maintenance	Infrastructure					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	
	Software					0	
	Software					0	
						0	
						0	
						0	

Oakland County -- Probate to TCS Conversion

December 1, 2004

Return on Investment Analysis

Cost Detail

Cost Description	Project Cost Category	Affects Project ROI?						Potential Cost Extensions						
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6	
IT Hours - New Development	Development Svcs	x						60,000						
IT Hours - System Maintenance	Development Svcs													
User Hours - New Development	Development Svcs													
User Hours - PTNE/OT	Development Svcs													
Contractor Professional Services	Development Svcs	x						40,000						
PC System - Acquisition	Hardware													
PC System - Maintenance	Hardware													
Notebook - Acquisition	Hardware													
Notebook - Maintenance	Hardware													
Mini Notebook - Acquisition	Hardware													
Mini Notebook - Maintenance	Hardware													
Laserprinter 1 - Acquisition	Hardware													
Laserprinter 1 - Maintenance	Hardware													
Laserprinter 2 - Acquisition	Hardware													
Laserprinter 2 - Maintenance	Hardware													
Laserprinter 3 - Acquisition	Hardware													
Laserprinter 3 - Maintenance	Hardware													
Image Workstations - Acquisition	Hardware													
Image Workstations - Maintenance	Hardware													
Terminals - Acquisition	Hardware													
Terminals - Maintenance	Hardware													
PRTR w/TERM ID - Acquisition	Hardware													
PRTR w/TERM ID - Maintenance	Hardware													
PRTR w/o TERM ID - Acquisition	Hardware													
PRTR w/o TERM ID - Maintenance	Hardware													
PC Maintenance User Owned	Hardware													
Printer Maintenance User Owned	Hardware													
Package Software - Acquisition	Software													
Package Software - Maintenance	Software	x	x	x	x	x	x	86,700	89,301	91,980	94,739	97,582	100,509	
Business Objects Access	Software													
Term Emulation SFTW-Acquisition	Software													
Term Emulation SFTW-Maintenance	Software													
Server - Acquisition/Upgrade	Infrastructure													

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Cost Detail

Cost Description	Project Cost Category	Affects Project ROI?						Potential Cost Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Server - Maintenance	Infrastructure												
Server Sftwre - Acquisition/Upgrade	Infrastructure												
Server Sftwre - Maintenance	Infrastructure												
TBD	Infrastructure												
TBD	Infrastructure												
TBD	Infrastructure												
TBD	Infrastructure												
Internet Access	Infrastructure												
Project Staff Training	Training												
User Training	Training												
	Software												
	Software												

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Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	60,000						60,000
IT Hours - System Maintenance							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services	40,000						40,000
<i>Development Services Subtotal:</i>	100,000						100,000
Hardware:							
<i>Hardware Subtotal:</i>							
Software:							
Package Software - Maintenance	86,700	89,301	91,980	94,739	97,582	100,509	560,811
<i>Software Subtotal:</i>	86,700	89,301	91,980	94,739	97,582	100,509	560,811
Infrastructure:							
<i>Infrastructure Subtotal</i>							
Training:							
<i>Training Subtotal:</i>							
Other:							
<i>Other Subtotal:</i>							
Costs Total:	186,700	89,301	91,980	94,739	97,582	100,509	660,811

