

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

Project Name: PepoleSoft Increased Workflow Functionality

Project ID: DA4154IF

Leadership Group: Finance/Administration			
Department: Human Resources		Division: General	
Project Sponsor: Ed Poisson	Date Requested: 03/26/2004	PM Customer No. 154	
Request Type: <i>New Development</i>			
IT Team Name: Finance/Administration		IT Team No: A	
Project Manager/Leader: Chithra Chakrapani			
Account Number: 96000	Account Description:	Customer Name:	
Grant Funded? No	Mandate? No	Mandate Source:	

Project Goal

To develop Human Resource workflow functionality so that departments can directly make employee changes and managers can access Human resource reports on real time, by December 2005.

Business Objective

To improve the business process by implementing workflow to save time and cut the cost of processing employee transactions. Workflow would allow departments to manually input their employee changes directly into the PeopleSoft system which will improve efficiencies by automating many of the current processes which will result in the elimination of many unnecessary steps. Workflow would provide business process improvements by streamlining and simplifying some of the Human Resource tasks such as printing and mailing of employee reviews and merit forms.

To improve efficiencies for Managers by automating Human Resource reports to provide them with real time access to their own Human Resource information.

Major Deliverables

- Requirements definition document identifying:
 - all current business processes as well as description of all automation that will occur
 - workflow for all automatic routing of information to appropriate individuals
- Systems design/configuration specifications/documentation

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- ❑ Documented security structure allowing managers/supervisors access to complete on-line Human Resource transactions.
- ❑ Test plan finalized and implemented to ensure proper testing prior to rollout of functionality.
- ❑ Communication/Change Management Plan to clearly communicate proposed implementation of workflow processes.
- ❑ Training plan/guide providing all necessary information which allows users to clearly understand how to access and use the provided functionality.
- ❑ Access for County managers/supervisors to complete on-line Human Resources transactions.
- ❑ Provide a support infrastructure for all users.

Approach

- ❑ Review and set up department's security roles.
- ❑ Review and set up department's managerial and supervisory reporting structure.
- ❑ Allow select users (advocates) to thoroughly test the system.
- ❑ Train all users how to utilize the functionality.
- ❑ Establish support prompts/documentation.
- ❑ Enable access to system for users.

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users All Oakland County employees

Divisions All County departments and divisions

Leadership Groups Finance/Administration

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Risk

Business Environment

High

Project will dramatically change existing business processes or will negatively effect the business environment if implementation is unsuccessful.

Technical Environment

Medium

Previously implemented technologies with new aspects and/or new requirements.

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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:	Ed Poisson	
Project Manager:		
Data Base Administrator:		
Source System Expert:		
Business Analyst:	Judy Fandale	
	Lori Motyka	
	Tina Ramey	
	Dean Shackelford	
	Cathy Shallal	
	Bill Shriner	
	Joanne Villella	
Programmer/Analyst:		

Facilities

-
-

Technical

-
-

Funding

- Available Finance/Administration Leadership Group hours
-

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Other

-
-

Priority

Constraints

-
-

Exclusions

-
-

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PROJECT PHASE AUTHORIZATION

Phase(s): All Phases	
Total Estimated Systems Development	Hours: 424 Cost: \$51,728.00
Total Estimated Technical Systems	Hours: 0 Cost: \$0.0
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: 424 Cost: \$51,728.00
Preliminary Estimated Development for Future Phases	Hours: Cost:
Grand Total Estimated Development	Hours: Cost:

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PROJECT COMPLETION AUTHORIZATION

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

The screenshot shows the Niku Workbench interface with a table of project phases and their estimated hours and costs. The table is as follows:

Type	ID	Task Name	Guideline %	Estimated Hours	Estimated Cost	Estimate Notes
Phase	000000	PROJECT MANAGEMENT		95	\$11,590.	
Phase	040000	BUSINESS SYSTEM DESIGN		134	\$16,348.	
Phase	050000	TECHNICAL DESIGN		80	\$9,760.0	
Phase	060000-0	PROGRAMMING		0	\$0.00	
Phase	070000	IMPLEMENTATION		85	\$10,370.	
Phase	080000	POST IMPLEMENTATION SUPPORT		30	\$3,660.0	
				424	\$51,728.00	

The software interface includes a menu bar (File, Edit, View, Tools, Window, Help), a toolbar, and a taskbar at the bottom with the Windows Start button and several open applications including 'Inbox - Microsoft...', '2005-2006 MP Reque...', 'Niku Workbench - [Pe...', and 'DA4154IF.doc - Micro...'. The system clock shows 4:07 PM.

Oakland County -- PeopleSoft Increased Workflow Functionality
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:	16,354	16,845	17,350	17,870	18,407	18,959	105,784
Cost Avoidance Subtotal:	0	0	0	0	0	0	0
Costs:							
Development Services Subtotal:	51,728	0	0	0	0	0	51,728
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
Annual Statistics:							
Annual Total Savings	16,354	16,845	17,350	17,870	18,407	18,959	105,784
Annual Total Costs	51,728	0	0	0	0	0	51,728
Annual Return on Investment	(35,374)	16,845	17,350	17,870	18,407	18,959	54,056
Annual Costs/Savings Ratio	316.30%	0.00%	0.00%	0.00%	0.00%	0.00%	
Project Cumulative Statistics:							
Cumulative Total Savings	16,354	33,199	50,549	68,419	86,826	105,784	105,784
Cumulative Total Costs	51,728	51,728	51,728	51,728	51,728	51,728	51,728
Cumulative Return on Investment	(35,374)	(18,529)	(1,179)	16,691	35,098	54,056	54,056
Cumulative Cost/Savings Ratio	316.30%	155.81%	102.33%	75.60%	59.58%	48.90%	48.90%
Year Positive Payback Achieved				Year 4			Year 4
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: _____						

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Staff time reallocation due to efficiency enhancements via real-time access to data and enhanced access to more helpful data on-line	Tangible Benefit		HR	230	34	7,820	1.030
Time savings for departments due to direct input into PeopleSoft HR system (savings from elimination of completion of transaction forms ie, early salary changes, position changes)	Tangible Benefit		HR	30	34	1,020	1.030
Staff time reallocation due to efficiency enhancements via reports viewable on-line locally, real-time	Tangible Benefit		HR	208	34	7,072	1.030
Time savings for elected officials, department heads, and managers due to real-time access to Human Resources reports.	Tangible Benefit		HR	13	34	442	1.030
Customer service responsiveness improvement						0	
						0	
						0	
						0	
						0	

Oakland County -- PeopleSoft Increased Workflow Functionality
Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Affects Project ROI?						Potential Savings Extensions					
		Y1	Y2	Y3	Y4	Y5	Y6	Y1	Y2	Y3	Y4	Y5	Y6
Staff time reallocation due to efficiency enhancements via real-time access to data and enhanced access to more helpful data on-line	Tangible Benefit	X	X	X	X	X	X	7,820	8,055	8,296	8,545	8,801	9,066
Time savings for departments due to direct input into PeopleSoft HR system (savings from elimination of completion of transaction forms ie, early salary changes, position changes)	Tangible Benefit	X	X	X	X	X	X	1,020	1,051	1,082	1,115	1,148	1,182
Staff time reallocation due to efficiency enhancements via reports viewable on-line locally, real-time	Tangible Benefit	X	X	X	X	X	X	7,072	7,284	7,503	7,728	7,960	8,198
Time savings for elected officials, department heads, and managers due to real-time access to Human Resources reports.	Tangible Benefit	X	X	X	X	X	X	442	455	469	483	497	512
Customer service responsiveness improvement													

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
IT Hours - New Development	Development Svcs		HR	424	122	51,728	
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					0	
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					0	
Business Objects Access	Software					0	
Term Emulation SFTW-Acquisition	Software					0	
Term Emulation SFTW-Maintenance	Software					0	
Server - Acquisition/Upgrade	Infrastructure					0	

Cost Detail

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	
						0	
						0	
						0	
						0	
						0	

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						51,728						
IT Hours - System Maintenance	Development Svcs													
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													
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													
Business Objects Access	Software													
Term Emulation SFTW-Acquisition	Software													
Term Emulation SFTW-Maintenance	Software													
Server - Acquisition/Upgrade	Infrastructure													

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												

Oakland County -- PeopleSoft Increased Workflow Functionality
Return on Investment Analysis

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	51,728						51,728
IT Hours - System Maintenance							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
<i>Development Services Subtotal:</i>	51,728						51,728
Hardware:							
<i>Hardware Subtotal:</i>							
Software:							
<i>Software Subtotal:</i>							
Infrastructure:							
<i>Infrastructure Subtotal</i>							
Training:							
<i>Training Subtotal:</i>							
Other:							
<i>Other Subtotal:</i>							
Costs Total:	51,728						51,728

