Oakland County
Department of Information Technology
Project Scope and Approach

Project Name: Equalization – Document Scanning **Project ID: D98125ED**

Leadership Group: Land		
Department: Management & Budget	**Division: Equalization**	
Project Sponsor: Dave Hieber	**Date Requested: 04/01/08**	**PM Customer No. 125**
Request Type:	***New Development*** ***Enhancement*** ***Customer Support*** ***Planned System Maintenance or Upgrade***	
IT Team Name: Land Implementation Services	**IT Team No: 9**	
Project Manager/Leader: Marc Groder		
Account Number: 31075	**Account Description:** Equal-Development	**Customer Name:** Equalization
Grant Funded? Yes **No**	**Mandate?** **Yes** **No** **Mandate Source:**	

Project Goal

Develop a scanning and document repository using the County's OakDocs solution, so that Equalization can scan and archive historical documentation.

Business Objective

To deploy a web application for document viewing and retrieval.

Major Deliverables

- Detailed Project Plan
- Application and/or System Requirements
- Technical Design
- Programming Specifications
- Program Code
- Scanning Hardware
- Implementation Plan
- Training Manual and Plan
- Service Level Agreement (SLA)
- Disaster Recovery Toolkit
- Service Center Knowledge Documents

Approach

- Develop Detailed Project Plan
- Review current business process and conduct needs assessment with customer, ensuring current manual processes are refined and automated.
- Document system requirements
- Determine and document system architecture and diagram
- Assess User Hardware and Software Requirements
- Conduct Tech Review
- Order hardware and software if needed
- Develop Implementation Plan
- Develop new system
- Develop User Acceptance Test Plan
- Test new system
- Acquire User Acceptance Sign off
- Conduct Change Control
- Develop User Documentation, SLA, Disaster Recovery Toolkit, Service Center Knowledge Documents
- Train users on new system
- Release new system into production

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users <80

Divisions **Equalization,**

Leadership Groups Land

Risk

Business Environment Low - Little or no impact to existing business process.

Technical Environment Low - Proven and previously implemented technologies.

Assumptions

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

Facilities

- Facilities will be available for staff.

Technical

- n/a

Funding

- Information Technology

Other

- n/a

Priority

- TBD

Constraints

- n/a

Exclusions

- n/a

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PROJECT PHASE AUTHORIZATION

Phase(s): Project Management, Business Requirements, Technical Requirements, Development, Installation, Post-Implementation Support			
Total Estimated Application Services	**Hours: 963**	**Cost: $111,386**	
Total Estimated Technical Systems	**Hours: 21**	**Cost: $0**	
Total Estimated eGovernment Services	**Hours:**	**Cost:**	
Total Estimated CLEMIS	**Hours:**	**Cost:**	
Total Estimated Internal Services	**Hours:**	**Cost:**	

IT Application Services Division Manager Approval:	**Date:**
IT Technical Systems Division Manager Approval:	**Date:**
IT eGovernment Services Division Manager Approval:	**Date:**
IT CLEMIS Division Manager Approval:	**Date:**
IT Internal Services Division Manager Approval:	**Date:**

IT Management Approval:	
Approved: Yes No	Date:
Reason:	
Project Sponsor Approval:	
Title:	Date:

PROJECT SUMMARY

Authorized Development (see above)	**Hours: 984**	**Cost: $111,386**
Preliminary Estimated Development for Future Phases	**Hours:**	**Cost:**
Grand Total Estimated Development	**Hours: 984**	**Cost: $111,386**

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PROJECT COMPLETION AUTHORIZATION

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

Equalization - Document Scanning - Size Estimate (+/- 10% to 50%)

	Type	ID	Task Name	Estimated Hours	Estimated Cost	Estimate Notes
	Phase	000000	PROJECT MANAGEMENT	253	$30,866.00	
	Phase	030000	BUSINESS AREA REQUIREMENTS	100	$7,319.99	
	Phase	050000	TECHNICAL DESIGN	151	$15,859.99	
	Phase	060000	PROGRAMMING	400	$48,799.98	
	Phase	070000	IMPLEMENTATION	40	$3,660.00	
	Phase	080000	POST IMPLEMENTATION SUPPORT	40	$4,880.00	
				984	$111,385.95	

Information Technology Strategic Plan Alignment

D98125ED - Equalization - Document Scanning

3.1 - Provide an Enhanced Application Service Offering

- 3.1.1 - Increase application integration through web services ☐
- 3.1.2 - Research and develop a Constituent Relationship Management (CRM) strategy ☐
- 3.1.3 - Promote mobility and location integration in business applications ☐
- 3.1.4 - Utilize ecommerce platform to offset costs and expand product offerings to customers ☐
- 3.1.5 - Improve the quality, reliability and availability of all applications ☐
- 3.1.6 - Increase the agility and responsiveness of business units by expanding customer analytics ☐
- 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 ☐
- 3.1.8 - Centralize identity and access management for all applications and content ☒

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 for service delivery ☐
- 3.2.2 - Implement the IT Infrastructure Library (ITIL) best practice framework for IT Service Management ☐
- 3.2.3 - Define a service and support strategy that clearly identifies the IT service provided ☐
- 3.2.4 - Provide a high-quality training program to empower employees through technology ☐
- 3.2.5 - Develop a formalized customer communication plan ☐
- 3.2.6 - Build IT Staff expertise through professional development ☐
- 3.2.7 - Expand capacity through ongoing organizational review and selective outsourcing ☐

3.3 - Implement a Standardized Infrastructure Strategy

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

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

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:	0	2,309	2,401	2,497	2,597	2,701	12,505
Costs:							
Development Services Subtotal:	137,982	17,934	17,934	17,934	17,934	17,934	227,652
Hardware Subtotal:	2,500	0	0	0	0	0	2,500
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	0	2,309	2,401	2,497	2,597	2,701	12,505
Annual Total Costs	140,482	17,934	17,934	17,934	17,934	17,934	230,152
Annual Return on Investment	(140,482)	(15,625)	(15,533)	(15,437)	(15,337)	(15,233)	(217,647)
Annual Costs/Savings Ratio	0.00%	776.77%	746.89%	718.16%	690.54%	663.98%	
Project Cumulative Statistics:							
Cumulative Total Savings	0	2,309	4,710	7,207	9,804	12,505	12,505
Cumulative Total Costs	140,482	158,416	176,350	194,284	212,218	230,152	230,152
Cumulative Return on Investment	(140,482)	(156,107)	(171,640)	(187,077)	(202,414)	(217,647)	(217,647)
Cumulative Cost/Savings Ratio	0.00%	6861.40%	3744.20%	2695.71%	2164.55%	1840.45%	1840.45%
Year Positive Payback Achieved							NO PAYBACK
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 -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
Reduction of time spent looking for paperwork (1 Clerk about 80 hours per year)	Cost Avoidance			80	28	2,220	1.040
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
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						0	
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						0	
						0	
						0	
						0	

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

Savings Detail

		Affects Project ROI?						Potential Savings Extensions					
Benefit/Savings Description	**Project Savings Category**	**Y1**	**Y2**	**Y3**	**Y4**	**Y5**	**Y6**	**Y1**	**Y2**	**Y3**	**Y4**	**Y5**	**Y6**
Reduction of time spent looking for paperwork (1 Clerk about 80 hours per year)	Cost Avoidance		X	X	X	X	X		2,309	2,401	2,497	2,597	2,701

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

Savings Summary

Benefit/Savings Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Tangible Benefit:							
Tangible Benefits Subtotal:							
Cost Avoidance:							
Reduction of time spent looking for paperwork (1 Clerk about 80 hours per year)		2,309	2,401	2,497	2,597	2,701	12,505
Cost Avoidance Subtotal:		***2,309***	***2,401***	***2,497***	***2,597***	***2,701***	***12,505***
Savings Total:		***2,309***	***2,401***	***2,497***	***2,597***	***2,701***	***12,505***

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Projec Y1	Y2	Y3	Y4
IT Hours - New Development	Development Svcs			984	122	120,048		X			
IT Hours - Customer Support	Development Svcs			59	122	7,198		X	X	X	X
IT Hours - System Maintenance	Development Svcs			88	122	10,736		X	X	X	X
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			1	2,500	2,500		X			
Server - Maintenance	Infrastructure					0					
Server Sftwre - Acquisition/Upgrade	Infrastructure					0					

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

Cost Detail

Cost Description	Project Cost Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Cost	Annual Multiplier	Affects Projec Y1	Y2	Y3	Y4
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					

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

Cost Detail

		t ROI?		Potential Cost Extensions					
Cost Description	**Project Cost Category**	**Y5**	**Y6**	**Y1**	**Y2**	**Y3**	**Y4**	**Y5**	**Y6**
IT Hours - New Development	Development Svcs			120,048					
IT Hours - Customer Support	Development Svcs	X	X	7,198	7,198	7,198	7,198	7,198	7,198
IT Hours - System Maintenance	Development Svcs	X	X	10,736	10,736	10,736	10,736	10,736	10,736
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			2,500					
Server - Maintenance	Infrastructure								
Server Sftwre - Acquisition/Upgrade	Infrastructure								

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

Cost Detail

		t ROI?		Potential Cost Extensions					
Cost Description	**Project Cost Category**	**Y5**	**Y6**	**Y1**	**Y2**	**Y3**	**Y4**	**Y5**	**Y6**
Server Sftwre - Maintenance	Infrastructure								
TBD	Infrastructure								
TBD	Infrastructure								
TBD	Infrastructure								
TBD	Infrastructure								
Internet Access	Infrastructure								
Project Staff Training	Training								
User Training	Training								

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

As Of: 06-16-08

Cost Summary

Cost Description	Year 1	Year 2	Year 3	Year 4	Year 5	Year 6	Total
Development Services:							
IT Hours - New Development	120,048						120,048
IT Hours - Customer Support	7,198	7,198	7,198	7,198	7,198	7,198	43,188
IT Hours - System Maintenance	10,736	10,736	10,736	10,736	10,736	10,736	64,416
User Hours - PTNE/OT							
Contractor Professional Services							
Development Services Subtotal:	***137,982***	***17,934***	***17,934***	***17,934***	***17,934***	***17,934***	***227,652***
Hardware:							
Server - Acquisition/Upgrade	2,500						2,500
Hardware Subtotal:	***2,500***						***2,500***
Software:							
Software Subtotal:							
Infrastructure:							
Infrastructure Subtotal							
Training:							
Training Subtotal:							
Other:							
Other Subtotal:							
Costs Total:	***140,482***	***17,934***	***17,934***	***17,934***	***17,934***	***17,934***	***230,152***

Oakland County -- Equalization - Document Scanning

Return on Investment Analysis

Assumptions

Date	Assumption Description
10-Jun-08	Equalization has all scanned documents in PDF Format on Network Drive.
26-Jun-08	Equalization will continue to scan documents on current equipment going forward.
26-Jun-08	Annual Support is estimated at 15% of the overall project costs.
26-Jun-08	$2,500 Server Addition is (10,000 / 4) divided among four OakDocs customers. (per Rick Perry)