

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

Project Name: OCDC Document Retention Application Requirements

Project ID:

| | | | |
|---|--|---------------------------------|------------------------------------|
| Leadership Group: Land | | | |
| Department: Drain Commissioner's Office | | Division: Administration | |
| Project Sponsor: Kevin Larsen | Date Requested: 10/15/07 | PM Customer No. 730 | |
| Request Type: | <i><u>New Development</u></i> | <i>Enhancement</i> | <i>Customer Support</i> |
| | <i>Planned System Maintenance or Upgrade</i> | | |
| IT Team Name: Land Implementation Services | | IT Team No: 9 | |
| Project Manager/Leader: Rochelle Meacham | | | |
| Account Number: | Account Description: | Customer Name: | Drain Commissioner's Office |
| Grant Funded? Yes | <u>No</u> | Mandate? Yes | <u>No</u> |
| | | Mandate Source: | |

Project Goal

To complete a thorough review of the Oakland County Drain Commissioner's current document management process, so that opportunities to leverage the OakDocs application for the electronic storage of documents can be identified.

Business Objective 1:

To review the current document management process of the Oakland County Drain Commissioner's Office.

Major Deliverables

Document storage process document for Oakland County Drain Commissioner's Office.

Approach

- Conduct interviews with the appropriate department staff
- Inventory existing software environment used for document management
- Inventory existing hardware environment used for document management
- Identify any data conversion needs
- Document and review current workflow process of document storage for Oakland County Drain Commissioner's Office

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Business Objective 2:

To develop an electronic document retention implementation plan for the Oakland County Drain Commissioner's Office.

Major Deliverables

OCDC electronic document retention Implementation Plan

Approach

Review the current Oakland County OakDocs application and accompanying architecture

Review the document management functionality provided within Azteca's Cityworks application to ensure overlap does not exist

Conduct brainstorming sessions with IT project team

Conduct brainstorming sessions with appropriate departments

Identify software environment

Identify hardware environment

Document implementation approach

Create and recommend an implementation strategy

Benefits

See Return on Investment (ROI) Analysis Document

Impact

Number of Users 150

Divisions Oakland County Drain Commissioner's Office

Leadership Groups Land

Risk

Business Environment Medium – Project will require some changes to existing business processes. Previously implemented technologies with new aspects and/or new requirements.

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

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Assumptions

Staffing

- IT Resources will be available for the hours indicated on detailed project plan.

Facilities

- Facilities will be available for IT staff at the IT building.

Technical

- The technical environment will be determined after completion of the sizing.

Funding

- TBD

Other

Priority

- TBD

Constraints

-
-

Exclusions

-

PROJECT PHASE AUTHORIZATION

**Oakland County
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Project ID:

| | | |
|--|---------------|--------------|
| Phase(s): | | |
| Total Estimated Application Services | Hours: | Cost: |
| Total Estimated Technical Systems | Hours: | Cost: |
| 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: | Cost: |
| 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: |

OCDC OakDocs Application
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: | 17,340 | 15,590 | 15,590 | 15,590 | 15,590 | 15,590 | 95,288 |
| Costs: | | | | | | | |
| Development Services Subtotal: | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| 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 | 17,340 | 15,590 | 15,590 | 15,590 | 15,590 | 15,590 | 95,288 |
| Annual Total Costs | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Annual Return on Investment | 17,340 | 15,590 | 15,590 | 15,590 | 15,590 | 15,590 | 95,288 |
| Annual Costs/Savings Ratio | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% | 0.00% |
| Project Cumulative Statistics: | | | | | | | |
| Cumulative Total Savings | 17,340 | 32,929 | 48,519 | 64,108 | 79,698 | 95,288 | 95,288 |
| Cumulative Total Costs | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Cumulative Return on Investment | 17,340 | 32,929 | 48,519 | 64,108 | 79,698 | 95,288 | 95,288 |
| 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? | | | | | | | |
| 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: _____ | | | | | | |

Project Summary

| Benefit/Savings Description | Project Savings Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Savings | Annual Multiplier |
|---|---------------------------------|---------------------------------------|------------------|--------------|----------------------|----------------------|--------------------------|
| Reduction of file cabinets, elimination of redundant storage of hard copy documents | Cost Avoidance | | EA | 10 | 175 | 1,750 | |
| Reduction in staff time to process customer inquiries | Cost Avoidance | | HR | 1,040 | 15 | 15,590 | |
| Long term retention of electronic documents will reduce the amount of facility space required for paper document storage | Cost Avoidance | | | | | 0 | |
| Preservation of historical and fragile documents that are not able to be replicated, they will be stored electronically therefore the risk of them being destroyed is minimized | Cost Avoidance | | | | | 0 | |
| Improved document accessibility will reduce the amount time it takes to respond to customer inquiries | Cost Avoidance | | | | | 0 | |
| Central electronic repository for departmental documents will eliminate the need to mail documents between OCDC offices when performing daily operations | Cost Avoidance | | | | | 0 | |
| | | | | | | 0 | |
| | | | | | | 0 | |
| | | | | | | 0 | |
| | | | | | | 0 | |
| | | | | | | 0 | |

Project Summary

| Benefit/Savings Description | Project Savings Category | Affects Project ROI? | | | | | | Potential Savings Extensions | | | | | | |
|---|--------------------------|----------------------|----|----|----|----|----|------------------------------|--------|--------|--------|--------|--------|--|
| | | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 | |
| Reduction of file cabinets, elimination of redundant storage of hard copy documents | Cost Avoidance | X | | | | | | 1,750 | | | | | | |
| Reduction in staff time to process customer inquiries | Cost Avoidance | X | X | X | X | X | X | 15,590 | 15,590 | 15,590 | 15,590 | 15,590 | 15,590 | |
| Long term retention of electronic documents will reduce the amount of facility space required for paper document storage | Cost Avoidance | | | | | | | | | | | | | |
| Preservation of historical and fragile documents that are not able to be replicated, they will be stored electronically therefore the risk of them being destroyed is minimized | Cost Avoidance | | | | | | | | | | | | | |
| Improved document accessibility will reduce the amount time it takes to respond to customer inquiries | Cost Avoidance | | | | | | | | | | | | | |
| Central electronic repository for departmental documents will eliminate the need to mail documents between OCDC offices when performing daily operations | Cost Avoidance | | | | | | | | | | | | | |
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Project Summary

| Cost Description | Project Cost Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Cost | Annual Multiplier | Affects Project | | | |
|-------------------------------------|-----------------------|--------------------------------|-----------|-------|---------------|------------|-------------------|-----------------|----|----|----|
| | | | | | | | | Y1 | Y2 | Y3 | Y4 |
| IT Hours - New Development | Development Svcs | | | | | 0 | | | | | |
| 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 | | | | | |
| Server - Maintenance | Infrastructure | | | | | 0 | | | | | |
| Server Sftwre - Acquisition/Upgrade | Infrastructure | | | | | 0 | | | | | |

Project Summary

| Cost Description | Project Cost Category | Budget Category/Funding Source | Unit Desc | Units | Rate per Unit | Total Cost | Annual Multiplier | Affects Project | | | |
|-----------------------------|-----------------------|--------------------------------|-----------|-------|---------------|------------|-------------------|-----------------|----|----|----|
| | | | | | | | | 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 | | | | | |

Project Summary

| Cost Description | Project Cost Category | t ROI? | | Potential Cost Extensions | | | | | |
|-------------------------------------|-----------------------|--------|----|---------------------------|----|----|----|----|----|
| | | Y5 | Y6 | Y1 | Y2 | Y3 | Y4 | Y5 | Y6 |
| IT Hours - New Development | Development Svcs | | | | | | | | |
| 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 | | | | | | | | |
| Server - Maintenance | Infrastructure | | | | | | | | |
| Server Sftwre - Acquisition/Upgrade | Infrastructure | | | | | | | | |

Project Summary

| Cost Description | Project Cost Category | ROI? | | Potential Cost Extensions | | | | | |
|-----------------------------|-----------------------|------|----|---------------------------|----|----|----|----|----|
| | | 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 | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

Project Summary

| Cost Description | Year 1 | Year 2 | Year 3 | Year 4 | Year 5 | Year 6 | Total |
|---------------------------------------|--------|--------|--------|--------|--------|--------|-------|
| Development Services: | | | | | | | |
| IT Hours - New Development | | | | | | | |
| IT Hours - System Maintenance | | | | | | | |
| User Hours - New Development | | | | | | | |
| User Hours - PTNE/OT | | | | | | | |
| Contractor Professional Services | | | | | | | |
| <i>Development Services Subtotal:</i> | | | | | | | |
| 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: | | | | | | | |

