

# Oakland County Department of Information Technology Project Scope and Approach

**Project Name: Automated Billing System**

**Project ID: DJ1660AB**

<b>Leadership Group: Finance Admin</b>				
<b>Department:</b> Management and Budget			<b>Division:</b> Fiscal Services	
<b>Project Sponsor:</b> Lynn Sonkiss		<b>Date Requested:</b> 7/1/21		<b>PM Customer No.</b> 660
<b>Request Type:</b> <i>Enhancement</i>				
<b>IT Team Name:</b> eCommerce			<b>IT Team No:</b> J	
<b>Project Manager/Leader:</b> Anthony Elliott				
<b>Account Number:</b> 44023	<b>Account Description:</b>	FS-SYSTEM ENHANCEMENTS	<b>Customer Name:</b>	Fiscal Services-Gen Fund
<b>Grant Funded?</b> Yes <u>No X</u>		<b>Mandate?</b> Yes <u>No X</u>		
		<b>Mandate Source:</b>		

## Project Goal

To improve automated billing and payment features connected to Access Oakland accounts, so that resource efforts and invoicing costs are reduced.

## Business Objective

To determine an enhancement solution for either/or the current Property Gateway system and Access Oakland, that facilitate online billing and collection of payment that allows customers to handle renewals automatically, pay for services at the time of purchase and product delivery, and will eliminate the need for monthly invoicing.

### **Major Deliverables**

- Request for Proposal
- Detailed Project Plan
- Application and/or System Requirements
- Technical Design Document
- Technical Architecture Diagram
- User Acceptance Test Plan
- Implementation Plan
- Training/User Manual(s)
- Software Implementation

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- Service Level Agreement
- Disaster Recovery Toolkit
- Service Center Knowledge Documents

## **Approach**

- Develop Detailed Project Plan
- Document business requirements
- Document the technical requirements
- Develop Implementation Plan
- Develop User Acceptance Test Plan
- Conduct Unit Testing
- Conduct Functional Testing
- Conduction User Acceptance Testing
- 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

## **Research & Analysis**

**Gartner Research Recommendation - N/A**

## **Benefits**

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

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**Impact**

**Number of Users** approx. 337 business user accounts invoiced per month (May 2020 thru May 2021 average). Note that a business account can have multiple individual users in it.

**Divisions** Fiscal Services and Treasurer’s Office

**Leadership Groups** Finance/Admin

**Risk**

**Business Environment** High - Project will dramatically change existing business processes or will negatively affect the business environment if implementation is unsuccessful.

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

**Assumptions**

**Staffing** IT Staffing: resources will be available for the hours indicated per the ROI.  
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:	Lynn Sonkiss	As Needed
Project Stakeholder:	Shawn Phelps	As Needed
Project Stakeholder:	Tammi Shepherd	As Needed

**Facilities**

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## **Technical**

- Solution will most likely include technology different from current application environment, due to the need to create admin tools, updated user portals, and other new functionality that the current application environment cannot support.
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## **Funding**

- TBD

## **Other**

- Coordination with Service Center will be conducted to update user instructions, and support for the new solution. Current Service Center business process for validating business user accounts will remain as is.

## **Priority**

## **Constraints**

- none
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## **Exclusions**

- None known at this time
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## PROJECT PHASE AUTHORIZATION

<b>Phase(s):</b>	
<b>Total Estimated Application Services</b>	<b>Hours:</b>
<b>Total Estimated Technical Systems</b>	<b>Hours:</b>
<b>Total Estimated CLEMIS</b>	<b>Hours:</b>
<b>Total Estimated Internal Services</b>	<b>Hours:</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 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: <span style="margin-left: 150px;">Yes</span> <span style="margin-left: 100px;">No</span>	<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>Previously Authorized Development</b>	<b>Hours:</b>
<b>Preliminary Estimated Development for Future Phases</b>	<b>Hours:</b>
<b>Grand Total Estimated Development</b>	<b>Hours:</b> <span style="margin-left: 100px;"><b>Cost:</b></span>

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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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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:	6,720	6,787	6,855	6,924	6,993	7,063	41,342
Cost Avoidance Subtotal:	2,977	3,007	3,037	3,067	3,098	3,129	18,316
<b>Costs:</b>							
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
<b>Annual Statistics:</b>							
Annual Total Savings	9,697	9,794	9,892	9,991	10,091	10,192	59,658
Annual Total Costs	0	0	0	0	0	0	0
Annual Return on Investment	9,697	9,794	9,892	9,991	10,091	10,192	59,658
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	9,697	19,491	29,384	39,375	49,466	59,658	59,658
Cumulative Total Costs	0	0	0	0	0	0	0
Cumulative Return on Investment	9,697	19,491	29,384	39,375	49,466	59,658	59,658
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:	_____		

**Oakland County -- Automated Billing System**

Return on Investment Analysis

Savings Detail

Benefit/Savings Description	Project Savings Category	Budget Category/Funding Source	Unit Desc	Units	Rate per Unit	Total Savings	Annual Multiplier
FS Technician (20 hrs/mo)	Tangible Benefit			240	28	6,720	1.010
Mail room staffing (per invoice)	Cost Avoidance			337	0	144	1.010
Printing, paper, boxes	Cost Avoidance			1	370	370	1.010
Envelopes	Cost Avoidance			1	252	252	1.010
Postage (note that this is current postage rates)	Cost Avoidance			1	2,211	2,211	1.010
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	
						0	



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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
FS Technician (20 hrs/mo)	Tangible Benefit	x	x	x	x	x	x	6,720.00	6,787.20	6,855.07	6,923.62	6,992.86	7,063
Mail room staffing (per invoice)	Cost Avoidance	x	x	x	x	x	x	144.24	145.68	147.14	148.61	150.09	152
Printing, paper, boxes	Cost Avoidance	x	x	x	x	x	x	370.00	373.70	377.44	381.21	385.02	389
Envelopes	Cost Avoidance	x	x	x	x	x	x	252.00	254.52	257.07	259.64	262.23	265
Postage (note that this is current postage rates)	Cost Avoidance	x	x	x	x	x	x	2,211.00	2,233.11	2,255.44	2,278.00	2,300.78	2,324

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Return on Investment Analysis

Savings Summary

<b>Benefit/Savings Description</b>	<b>Year 1</b>	<b>Year 2</b>	<b>Year 3</b>	<b>Year 4</b>	<b>Year 5</b>	<b>Year 6</b>	<b>Total</b>
<b>Tangible Benefit:</b>							
FS Technician (20 hrs/mo)	6,720	6,787	6,855	6,924	6,993	7,063	41,342
<i>Tangible Benefits Subtotal:</i>	<b>6,720</b>	<b>6,787</b>	<b>6,855</b>	<b>6,924</b>	<b>6,993</b>	<b>7,063</b>	<b>41,342</b>
<b>Cost Avoidance:</b>							
Mail room staffing (per invoice)	144	146	147	149	150	152	887
Printing, paper, boxes	370	374	377	381	385	389	2,276
Envelopes	252	255	257	260	262	265	1,550
Postage (note that this is current postage rates)	2,211	2,233	2,255	2,278	2,301	2,324	13,602
<i>Cost Avoidance Subtotal:</i>	<b>2,977</b>	<b>3,007</b>	<b>3,037</b>	<b>3,067</b>	<b>3,098</b>	<b>3,129</b>	<b>18,316</b>
<b>Intangible Benefit:</b>							
<b>Savings Total:</b>	<b>9,697</b>	<b>9,794</b>	<b>9,892</b>	<b>9,991</b>	<b>10,091</b>	<b>10,192</b>	<b>59,658</b>

**Oakland County -- Automated Billing System**

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	165	0		x							

**Oakland County -- Automated Billing System**

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	0.00					

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Return on Investment Analysis

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	0						
IT Hours - System Maintenance							
IT Hours - Customer Support							
IT Hours - Planned Maintenance							
User Hours - New Development							
User Hours - PTNE/OT							
Contractor Professional Services							
<i>Development Services Subtotal:</i>							
<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>							

