

# CITY OF OAKLAND

## AGENDA REPORT

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OFFICE OF THE CITY CLERK  
OAKLAND  
2008 MAY -1 PM 8:04

**TO:** Office of the City Administrator  
**ATTN:** Deborah Edgerly  
**FROM:** Department of Information Technology  
**DATE:** May 13, 2008

**RE: A Follow-Up Report From The Department Of Information Technology On  
Technology Programs And Projects**

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### SUMMARY

This report provides follow-up information on items presented at the April 8, 2008, Finance and Management Committee meeting. The committee directed staff to return with the following information: 1) An updated Attachment C (Current Information Technology Projects), including the dates that Council passed the Project or Program; 2) A joint report from Department of Information Technology and the Oakland Police Department concerning Police project status, differences in statistical information, project issues and how the public can or can not view this information (Scheduled to be heard by Public Safety Committee May 27, 2008); 3) How are old computers disbursed; 4) Update on system integration citywide; 5.) Update on the CEDA Permit Tracking and Electronic Data Management project.

Information concerning these requests is provided in the following Attachments:

**Attachment A:** Listing with Description of System and Software Integration – Citywide

**Attachment B:** How old computers are disbursed.

**Attachment C:** Updated Information Technology Projects

**Attachment D:** Update on CEDA Permit Tracking and Electronic Data Management project.

### FISCAL IMPACT

This report is informational. The financial numbers contained in the attached documents are for reference.

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## **BACKGROUND**

This report is a follow-up to the April 8, 2008 report which outlined the programs and projects undertaken by the Department of Information Technology. The information attached provides background and financial estimates for technology programs and future enhancements.

## **PROJECT DISCRIPTION**

Project descriptions are contained in the attachments provided. This report clarifies and provides additional information on Information Technology projects and programs

## **KEY ISSUES AND IMPACTS**

The implementation of the identified project initiatives will have a major impact on addressing issues related to the City's financial, human resource and critical business functions. The Personnel Department forecasts that a significant amount of the City's workforce will be eligible to retire by 2010 and secession planning programs will be needed to address the loss of skilled City employees who retire. Automation and process integration will be a useful tool to capture the critical business function know-how of the City's most experienced employees while they are still with the City.

The City is working to implement new internal controls for financial reporting. In doing so, plans are to adopt best practices of the Committee of Sponsoring Organizations (COSO) of the Treadway Commission. COSO is commonly recognized as the best practices framework for controlling, monitoring, and assessing financial reporting in the public sector. Automating internal control processes for financial reporting will centralize the enforcement of segregation of duties and business roles to support the implementation of the COSO practices.

The creation of a 3-1-1 system will provide the Oakland community with a "one stop" service entrance to the Oakland City Government. This initiative will centralize City organizations into one common number for obtaining all non-emergency services. This single initiative can transform the delivery, tracking and quantification of City services and would centralize the form and delivery of service information back to Oakland community.

The integration of document management is a huge and complex initiative as demonstrated by the CEDA's efforts. The integration of documents city-wide would allow for the easy retrieval and dissemination of documents throughout the city. The initiative would bring all future documents into digital form and dramatically reduces the amount of paper storage.

The delivery of Oakland city services are accomplished through a series of community oriented branches of the central government. While downtown government buildings enjoy many of today's technological advances and services, our extended community delivery service does not. In order to integrate these services and provide staff and community access to these same basic services, a high speed direct connection is necessary. Part of this delivery system includes the

hardware and software necessary to provide secure connections to these centers. This initiative would allow for direct email, calendaring, messaging, and Oracle applications access, and file transfers and sharing to name a few. This includes all branch libraries, recreation centers, senior centers and fire stations.

## **SUSTAINABLE OPPORTUNITIES**

**Economic:** Implementation on this project provides the opportunity to hire local business resources at every instance possible.

**Environmental:** There are numerous opportunities for positive potential impacts by these initiatives. These include: Reduction of greenhouse through reduce vehicular trips to the downtown area for City business; Reduction and storage of paper products, toner and inks.

**Social Equity:** One of the Initiatives will allow the City to post job opportunities on the Internet. Individuals interested in employment opportunities at the City will be able to securely and privately submit their resume and fill out employment applications from their homes or place of business. 3-1-1 services will allow for multi-language access to City services and information

## **DISABILITY AND SENIOR CITIZEN ACCESS**

Local and Web access for Oakland residents will greatly enhance those with disabilities and seniors, greater access to services and information.

## **ACTION REQUESTED OF THE CITY COUNCIL**


This is an informational report and no formal action is required.

Respectfully Submitted,



Bob Glaze, Director  
Department of Information Technology

APPROVED AND FORWARDED TO THE  
FINANCE AND MANAGEMENT COMMITTEE:

  
Office of the City Administrator

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May 13, 2008

# CITY OF OAKLAND

## *Department of Information Technology*

### **City-Wide System and Software Integration Initiatives**

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#### **PROJECT DESCRIPTION**

##### **Project Initiative HR1: Human Resource Management**

###### Implement Oracle's Recruitment Application

This application is a full life-cycle recruiting solution that will give managers, recruiters and candidates the ability to manage every phase of finding, recruiting, hiring, and tracking new employees. The application focuses on the "manager-recruiter-candidate" hiring relationship, incorporating all aspects of applicant tracking with capabilities that allow managers, recruiters and candidates to fully manage the entire recruiting cycle via a self-service interface, both internally for employees and externally (via the Internet) for non-employees interested in employment at the City.

###### Implement Oracle's Learning Management Application

This application is a learning management solution. It will give Human Resource Training managers the ability to manage, deliver, and track training participation in online or classroom-based environments for all City agencies and departments. Employees can find the topic they need, and take the course in the most appropriate delivery mode (in a classroom, in a virtual classroom, or self-paced electronic learning). Managers can automate key business flows - from training request processing to training delivery; from performance appraisals to training assessments - and keep tabs on their staff's learning and development. Training Instructors can manage their own schedules, classes, and rosters. Managers can measure the effectiveness of learning activities and ensure alignment with organizational objectives. Learning Administrators can manage the training catalog, learning enrollees, and related resources from a centralized system.

##### **Project Initiative HR2: Human Resource Management**

###### Implement Oracle's Advanced Benefits

This application is a full-featured, rules-based benefits and compensation administration system that will enable staff manage and deliver benefits programs which meet the City's mission and objectives. The application manages any type of employee or non-employee events from Annual Enrollment to family or work-related changes; creates and modifies eligibility rules and criteria without customizing the application; facilitates workforce benefit decisions by utilizing "what-if" eligibility analysis protocols, and advanced analytical tools to evaluate benefits plans for maximum value; and, provides service center functionality to assist with benefits questions, make elections or resend materials.

**Attachment A**

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**Implement Oracle's Self-Service Human Resources Application**

This application will empower managers and employees to securely access and manage information and transactions in a paperless environment to streamline business processes and improve accuracy and timeliness of employee benefit services. It provides managers and employees a single point of entry to all HR information and processes under secure and personalized rules. It enables employees to manage or view everything from profiles - including skills, resumes, contact details - to benefits. Also allows authorized employees to maintain their own information, including personal profiles and benefits.

All of the above applications are engineered to work seamlessly with other Oracle Human Resource Management applications currently in production.

**Project Initiative FM1: Financial Management****Implement Oracle's Projects Accounting (Costing/Billing)**

This application is an integrated project-based cost collection, management, and accounting solution that will enable the City to effectively manage projects and activities across all agencies and departments. Project managers are empowered with timely, detailed cost information to monitor project performance, while financial managers can track and account for the total costs of running all City projects. The application processes project related expenditures, burdening and allocations, transaction and budgetary controls, adjustments, and asset capitalization.

**Labor Distribution**

The Labor Distribution module is a comprehensive labor costing solution and will allow the City to flexibly distribute the payroll expenses to Projects Accounting, Grants Accounting, and General Ledger.

**Grants Accounting**

This application module will completely track grants and funded projects from inception to final reporting. Features of the applications include a fully integrated system that supports multi-funded projects and the required compliance terms and conditions by award. Validations of allowable costs as well as flexible budgetary controls to ensure fiscal responsibility are supported. Reporting is comprehensive, supporting internal and external (state and federal grants) reports and queries needed to effectively manage funded projects.

Labor Distribution, Projects and Grants Accounting are engineered to work seamlessly with other Oracle Financial Management applications currently in production.

**Project Initiative FM2: Financial Management****Implement Oracle's Governance, Risk, and Compliance (GRC) Application Suite**

This application will help the City establish the COSO integrated framework best practices for controlling, monitoring, assessing, and auditing financial reporting. The Oracle GRC application suite will automate the integrated framework of internal financial control activities and consolidate them into a single system. GRC will also safeguard critical data, document and enforce segregation of duties and rules, and monitor all financial transactions.

**Attachment A**

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**DIT: Follow-up report on Information Technology Programs and Projects**

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The City's current software license agreement with the Oracle Corporation includes all of the applications identified for implementation with the exception of the GRC application suite, which will be a new purchase. All of the project initiatives will take 6 to 12 months to complete and require an estimated budget of \$2, 631,050 for professional services, support, and software purchases to accomplish the implementations. Staff requests City Council consider for implementation the identified Oracle Human Resource and Financial Management software technology project initiatives to enhance critical business function automation and process integration.

**Project Initiative CT1: 3-1-1 system**

The installation of a 3-1-1 system will provide the Oakland community with a "one stop" service entrance to Oakland City Government. The utilization of this initiative will centralize the City into one common number for obtaining all non-emergency services. This single initiative can transform the delivery, tracking and quantification of City services and would centralize the form and delivery of service information back to Oakland community.

The pricing contained in the Fiscal Impact section makes some basic assumptions:

- Software would be the expansion of the Legan system used in the Oaklanders' Assistance Center.
- Staffing would be the consolidated from various City answer points into one combined center
- Staffing additions would be the costs for one programmer, one manager and premium pay for shifts and supervision.
- An existing City facility would be remodeled to create the new center.

**Project Initiative TC1: Remote Site network Connections:**

This initiative would provide a high speed connection to remote City facilities and create a data delivery system. This would provide remote sites with basic functions such as calendaring, Exchange e-mail, file transfers and retrieval, Electronic Time cards, Oracle applications and messaging. Sites to be included are:

- Recreation Centers
- Branch Libraries
- Fire Stations
- Senior Centers

**Project Initiative DM1: Electronic Data Management:**

The creation of a City-wide Document management initiative would combine the majority of City documents together - - providing an ability to retrieve, save and disseminate documents electronically. The initiative would bring all future documents into digital form and dramatically reduce the amount of paper storage and also allow for the retrieval of documents from any City computer. This system would provide the public access to City documents via the WEB and reduce duplicating cost. Cost includes the addition of a dedicated Programmer.

**Attachment A**

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**FISCAL IMPACT**

The following estimated budget would be required to implement the integrated Software programs detailed in this report :

Project Initiatives	Oracle Software Technology Implementation Requirements	Services* Cost	Software/Hardware Cost	Support** Cost	Total Initiative Cost
<b>Initiative HR1:</b>	<ul style="list-style-type: none"> <li>• Oracle Recruitment</li> <li>• Oracle Learning Management</li> </ul>	350,000			350,000
<b>Initiative HR2:</b>	<ul style="list-style-type: none"> <li>• Oracle Advanced Benefits</li> <li>• Oracle Self-Service HR</li> </ul>	485,000			485,000
<b>Initiative FM1:</b>	<ul style="list-style-type: none"> <li>• Oracle Project Accounting</li> <li>• Labor Distribution</li> <li>• Grants Accounting</li> </ul>	475,000			475,000
<b>Initiative FM2:</b>	<ul style="list-style-type: none"> <li>• Oracle Governance, Risk, and Compliance Application Suite</li> </ul>	525,000	652,500	143,550	1,321,050
<b>Initiative CT1:</b>	<ul style="list-style-type: none"> <li>• 3-1-1 Software</li> <li>• Telephony equipment</li> <li>• Facility Remodel</li> <li>• Additional Staffing</li> <li>• Marketing</li> <li>• Server equipment</li> </ul>	100,000 95,000 175,000 75,000 300,000 0	750,000 210,000 100,000 0 0 75,000	125,000 110,000 50,000 285,000 0 16,000	2,566,095
<b>Initiative TC1:</b>	<ul style="list-style-type: none"> <li>• Recreation Centers</li> <li>• Library Branches</li> <li>• Fire Stations</li> <li>• Senior Centers</li> </ul>	35,000 28,000 40,000 10,000	140,000 95,000 155,000 20,000	51,000 35,000 55,000 11,000	675,000
<b>Initiative DM1:</b>	<ul style="list-style-type: none"> <li>• Electronic Data Management System and Storage</li> </ul>	2,100,000	3,800,000	650,000	6,550,000

\* The total cost for professional services includes funds for technical and functional training for IT staff and users.

\*\* This is an annual support fee. Total estimated budget only includes one year of support.

# **CITY OF OAKLAND**

*Department of Information Technology*

## **Computer redeployment and surplus**

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### **Computers are eligible for refurbishment if they meet the following criteria:**

- They are license with a currently supported operating System (currently Windows XP & Vista)
- Units are free of physical damage.
- Unit pass normal system integrity tests.

Refurbished computers are available to all departments to replace older computers or supplement existing stock. Refurbish computers will require the purchase of Microsoft Office, Norton Anti virus and any other applicable software.

### **Computers not meeting the above criteria will be eligible to be surpluses.**

Computers to be surplused are documented with Make, Model and serial number.

City Administrator or his or her designee will declare equipment surplus and eligible for donation.

### **Current computer donation avenues:**

- Microsoft Community refurbishment program
- Oakland Technology exchange
- Donation request from Oakland non-profit community based organization.



# Department of Information Technology Projects Status Report - April 2008

**MISSION STATEMENT:** The Department of Information Technology is committed to providing the timely delivery of strategic, responsive, cost-effective technology solutions and quality services to meet the goals defined by the Mayor, City Council and Oakland's citizens. We are dedicated to maintaining the highest standards of excellence in our technical skills by providing total quality workmanship and expertise; by understanding the needs of the customer to facilitate the accomplishment of common objectives; and by always treating customers and staff with respect and dignity.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
1	Procurement Contracts (Procure-To-Pay Project)	Implement Oracle's Procurement Contracts and other applications (i.e. Oracle's Sourcing, Supplier, Internet Procurement, BI Publisher, and BI Discoverer) to establish a full life cycle procurement and contract management and payment solution for the Department of Contracting and Purchasing.	Contracts & Purchasing, Finance	6/1/2007	6/25/2007	6/30/2008	\$463K CIP	All City agencies and departments and all City Suppliers	PLANNING - Functional and Design training workshop in progress. System setup in progress.
2	Constituent tracking Software	Installation of a 3-1-1 type tracking system for the Oaklander's Assistance Center. This will track citizen inquiries and complaints and aid staff in serving the Oakland Community.	Mayor's Office	Mar-08	TBD	TBD	\$100K \$50K(TBD) CIP	Entire Oakland Community	PLANNING - Deploying the infrastructure to start collecting the functional requirements. Project Plan needs to be developed with the vendor.
3	Overhaul of Oaklandnet.com, and Oaknetnews Portal	Working with Marketing Div, City Administrator's Office and eventually all the city agencies to revamp their WebPages. This includes installation of Oracle content management system, setting up firewalls and acquiring servers.	City Administrator	N/A	7/1/2007	9/30/2008	TBD	All City agencies and departments and Oakland citizens	EXECUTION - Deploying the web infrastructure to start building the framework and migrating the current content.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
4	Internal Personnel Assessment System (i-PAS)	Deployment and making enhancements to Internal Personnel Assessment System. Mandated by court order, a requirement of the Riders' Negotiated Settlement Agreement, this system performs many tasks among them: Assisting OPD in identifying at risk police officers and provides commanders, managers and supervisors a single source to view statistical and detailed information about their subordinates; Early intervention; Monitoring officer activity and behavior.	City Administrator, City Attorney, Police	N/A	5/15/2006	On-going	TBD	OPD Internal staff	EXECUTION - On-going maintenance and enhancements. We are anticipating to start working on the next version.
5	TeleStaff	The TeleStaff is an innovative, constant staffing, overtime management and notification software program.	Police	Feb-06	6/30/2006	6/30/2008	\$325K GRANT	OPD Internal staff	EXECUTION - Communications Division is using the application as part of the pilot testing. OPD wide rollout date will be determined later. All the modules of the system, Phone, Web, Client/Server, and Database are up and running for 1100 personnel.
6	TeleStaff/Personnel Database (PDB)/Oracle Integration	TeleStaff/PDB/Oracle interface will be developed to share the OPD Personnel data with the TeleStaff application.	Police	N/A	TBD	TBD	TBD	OPD Internal Staff	PROPOSED - In process of establishing project start and end dates.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
7	In-CAR Video Management System (ICVMS)	Install In-Car Video Camera system in 101 OPD cars, install a Video Archive Storage Area Network (SAN), install new ICVMS network, 3 Remote Video uploading sites, and backhaul 4.9GHz network.	City Administrator, Police	Sep-06	4/30/2007	6/30/2008	\$1.6M GRANT	OPD Internal staff	EXECUTION - Hardware/Software installation in the cars and is complete. Training and performance testing in 6 new cars is underway. Most of the backend Hardware/Software installation is complete. Currently the Digital Video Recorders (DVR) and Cameras are installed in 101 Patrol/SAC cars. However the new client software version needs
8	Personnel Information Management System (EVALIS Software)	The hardware and software components of this system will provide OPD with a computerized relational database required by the Negotiated Settlement Agreement (NSA). The entire solution is provided by Motorola.	City Administrator, City Attorney, Police	Sep-05	12/15/2005	TBD	\$325K GRANT	OPD Internal staff	EXECUTION - Due to various changes in the OPD personnel, project requirements, and EVALIS versions we are in the process of revising the project timeline.
9	EVALIS/i-PAS Integration	EVALIS/i-PAS Integration will be developed to share the Negotiated Settlement Agreement (NSA) dimensions data between the two applications.	Police	N/A	TBD	TBD	TBD	OPD Internal Staff	PROPOSED - In process of establishing project start and end dates.
10	On-Line Crime Reporting for Citizens	The system is designed to gather information on crimes from general public (citizen) via secure connection. The application will issue a temporary report number to the user and place the temporary report into an administrative holding area for review and modification by appropriate administrator. An email is generated to the user that the report has been submitted. This application includes an interface to the Law Records Management System (LRMS) as part of the program.	Police	N/A	8/3/2006	4/30/2008	\$50K GRANT	Entire Oakland Community	EXECUTION - System is operational. Pending Police policies and procedures.  Item: _____

Finance Management Committee

Attachment C

May 13, 2008

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
11	Legacy Records Management System (RMS) Data Conversion	Convert the Legacy data into a SQL database queriable by a variety of fields, such as name, location of crime, type of crime (statute or UCR category), etc.	Police	N/A	4/10/2007	4/30/2008	\$15K	OPD Internal Staff	EXECUTION - First Phase of conversion is completed. End Users testing the data.
12	Upgrade existing RF Data Radio Network to a High-Speed System for Police and Fire	RF Data Radio system upgrade and Data Sharing with other Regional PDs. Replace the existing RF DataTac system with the High Performance Data (HPD) solution.	Police	Dec-07	TBD	TBD	\$1.3M GRANT/CIP	Police	INITIATION - In process of establishing project start and end dates.
13	DOJ Network Upgrade	The new Microwave solution provides end-to-end encryption and tunneling for police and fire applications.	Police	N/A	12/15/2007	9/12/2008	TBD	Police	EXECUTION - Evaluating various solutions
14	Infrastructure Work Management System	Improve day-to-day operations of maintaining the City's infrastructure. Provide better information to field crews for performing their jobs, allow supervisors to better plan work loads based on available resources, provide management with better and faster tools to calculate performance measures, enhance customer service through improved web-based tools and better tracking of service requests, and increase transparency by having up-to-date information and maps available to show the cost and work associated with maintaining assets throughout the City.	PWA ,CEDA DCSD	Sep-07	Feb-08	Feb-09	\$1.2M CIP	Entire Oakland Community	PLANNING - In process of final contract negotiations. Contract will be ready for signature in couple of weeks.
15	Laptops	Based on the OPD Chief initiative for upgrading the Mobile Technology and platforms, Dell laptops are evaluated and selected by the City. Currently, we are working with Dell in procuring, configuring, installing and integrating 400+ laptops for all the Patrol Officers and OPD command staff in the patrol vehicles.	Police	Feb-07	6/30/2007	6/30/2008	\$2M GRANT	OPD Internal staff	EXECUTION - 90% of the laptops including the software and configuration are completed.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
16	OPD Staff Move - Police Administration Building (PAB) to Eastmont	OPD staff will be moving to the Eastmont Precinct after the first of the year. As such, computers will need to be connected, phone lines updated or moved, and any other IT functions required for staff transitioning to Eastmont. Also, some existing staff at Eastmont will be moving to new workstations within that precinct.	Police	N/A	12/15/2007	1/31/2008	Baseline	OPD Internal staff	CLOSING - Project on schedule
17	OPD Staff Move - Family Justice Center to PAB	We need phone lines and computers moved from the Family Justice Center to the PAB/4th Floor - a detailed assignment of phones and works stations has already been drafted and presented to OPD.	Police	N/A	1/15/2008	2/29/2008	\$70K OPD	OPD Internal staff	CLOSING - Project on schedule
18	Fire Simulator Project	This project includes installation of computers, overhead projector, sound system and telecommunication cabling to the simulator room.	Fire	N/A	9/15/2007	4/30/2008	\$54K GRANT	Fire	PLANNING - This is a Public/Private Partnership engagement.
19	Permit and Code Enforcement Tracking System (PCETS)	Municipal Software for Permit & Code Enforcement Tracking System (PCETS). Implementation and deployment of phase III (Code Enforcement module) for CEDA to replace the existing system running on AS/400 platform.	CEDA	Jun-05	2/15/2008	6/30/2008	\$750K CIP	Entire Oakland Community	PLANNING - Completed the contract negotiation and infrastructure. Project Kick-Off with the Vendor in early Feb.'08
20	Electronic Document Management System (EDMS)	Electronic Document Management System (EDMS), for scanning, storing and indexing all CEDA documents	CEDA	Jun-05	10/1/2005	5/3/2006	\$2.82M CIP	CEDA	EXECUTION - Over 100,000 documents were scanned, index and verified. Day-to-day operation of documents scanning, data entry and validation in progress
21	Enterprise Web Content Management (WCM) System for CEDA	Implement Web Content Management System and establish network security to share documents with citizens.	CEDA	N/A	2/15/2007	TBD	Budgeted part of EDMS	Entire Oakland Community	EXECUTION - In process of updating the project plan.
22	Electronic Document Management System (EDMS) Operation	Amend the EDMS contract to allow for outsourcing of the document scanning and conversion.	CEDA	N/A	TBD	TBD	TBD	Entire Oakland Community	PROPOSED - In process of establishing project start and end dates.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
23	CEDA server move to Emergency Operations Center (EOC)	Migration of EDMS production servers to EOC Data Center. There are 9 servers identified as production servers that are mission critical to CEDA EDMS project.	CEDA	N/A	TBD	TBD	Baseline	CEDA DCSD Internal Staff	PLANNING - In process of establishing project start and end dates.
24	Business Tax	The new Business Tax system will replace the existing AS400 legacy system, providing an open and scalable platform for interfacing with other applications.	Finance	Jul-06	07/1207	TBD	\$617K CIP	Finance Internal Staff	EXECUTION - Data Conversion Testing and Training in progress. Project timeline needs to be revised.
25	Point of Sales (Phase I)	Implement POS system for Treasury. No special interfaces required.	Treasury	Oct-06	3/26/2007	11/29/2007	Baseline	Entire Oakland Community	CLOSING - Testing and Training. Implemented POS project in several City departments including Treasury, Revenue, Contract Compliance, Fire Admin, Fire Prevention, Police Admin, Police Traffic, Police Records, and Police Animal Control
26	Point of Sales (Phase II)	Implement special interfaces to complete POS implementation for CEDA, Revenue Division. Parking and Parks & Recreation Department	Treasury	Oct-06	11/30/2007	TBD	TBD	Entire Oakland Community	INITIATION - In process of establishing project start and end dates.
27	Auditor's TeamMate System	Implement a document/work flow system for the use of Auditor's office staff	Auditor's Office	TBD	TBD	TBD	\$45K Auditor's Office	Auditor's internal staff	PROPOSED - In process of establishing project start and end dates.
28	Oracle Grants Accounting Module	Implement Oracle Grants Accounting Module	Budget, Finance & Human Services	TBD	TBD	TBD	TBD	All City Agencies and Departments	Application is currently under user evaluation.
29	Oracle Project Accounting Module	Implement Oracle Project Accounting Module	Finance	TBD	TBD	TBD	TBD	All City Agencies and Departments	Application is currently under user evaluation.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
30	E-Citation	E-Citation for OPD Traffic – This new application will automate the issuing of citations by the Police Department sworn personnel in order to improve their operational efficiency. It will enable electronic citations issued in the field to interface with City's LRMS; transfer citation data to the California Superior Court system (CASP and SoftFile); electronically capture racial profiling data to help to achieve compliance with the Negotiated Settlement Agreement for the reporting, collection and analysis	Police	Dec-07	4/1/2008	TBD	\$145K GRANT	OPD Internal Staff	PLANNING - Contract Negotiation is almost complete. In process of establishing project start and end dates.
31	Crime Reporting Portal	Crime data integration, reporting and analysis. This application software will organize and rapidly analyze the vast quantities of structured and seemingly unrelated data, currently housed in various incompatible databases and record management systems, over a highly secure intranet-based platform.	Police	TBD	TBD	TBD	\$55K OPD	OPD Internal Staff	PROPOSED - In process of establishing project start and end dates.
32	Overhead Paging/Public Address System	Install over 160 speakers 5 zone system through-out Eastmont Precinct	Police	N/A	TBD	TBD	\$18K	Police	ON HOLD - No funding is available
33	Radio Interoperability	Developed the Regional Interoperability and Data Sharing System based on the Department of Homeland Security (DHS) and Department of Justice (DOJ) Guidelines	Police	TBD	TBD	TBD	\$3M GRANT/CIP	Police and Fire	PLANNING - In process of establishing project start and end dates.
34	On-Line Policies, Publishing, and Tracking System	Implement a Management Software program to allow for the paperless distribution, organization and maintenance of all written directives; i.e. Negotiated Settlement Agreement (NSA) related documents and updated Departmental policy and procedures.	Police	N/A	TBD	TBD	\$30K OPD	Police	PROPOSED - In process of establishing project start and end dates.
35	Fire Inspection	Fire Inspection System for OFD – This system will enable Fire Department in mobile data collection for managing occupancy inspection information.	Fire	N/A	6/15/2007	5/31/2008	\$25K GRANT	OFD Internal Staff	EXECUTION - In process of establishing project start and end dates.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
36	Loan Servicing System	Implement new Loan Servicing Application. This new application will replace the existing application for loan servicing.	CEDA		1/19/2007	1/9/2009	\$460K CIP	Entire Oakland Community	PLANNING - In process of refining project scope, timeline and architecture.
37	Library Servers Move	This project will move Library servers to the DIT datacenter.	Library	N/A	11/30/2007	Apr-08	Baseline	Library	CLOSING - Successfully completed with minimum downtime
38	Construction & Demolition Recycling Database	Make modifications to existing Access Database.	PWA	N/A	TBD	TBD	Baseline	PWA Internal Staff	INITIATION - In process of establishing project start and end dates.
39	AutoCAD Upgrade	Upgrade all AutoCAD users to same version (2008), for ease of cross training; productivity; and ongoing technical support. Perform related hardware upgrades as predecessor requirement. Ensure licensing compliance.	CEDA DCSD, PWA	N/A	Jan-08	TBD	Baseline	CEDA DCSD and PWA Internal Staff and City's contractors	INITIATION - In process of establishing project start and end dates.
40	Pilot FTP Server	Implement File Transfer Protocol (FTP) Server to allow the transfer (send/receive) large files to outside stakeholders.	CEDA DCSD, PWA, and others	N/A	Feb-08	Apr-08	Baseline	Entire Oakland Community	CLOSING - Installation is done. In process of testing the application



No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
41	Davis Street Transfer Station Database	Implement a new database to capture monthly waste management tonnages, truck numbers, and other information. This new database will allow to create some basic queries and reports that would be useful to PWA divisions including Keep Oakland Clean and Beautiful, Park maintenance, and Environmental Services.	PWA	N/A	Baseline	Baseline	Baseline	PWA Internal Staff	PROPOSED - In process of establishing project start and end dates.
42	Migrate Project Tracker Database to SQL Server	Migrate Project Tracker Database from Microsoft Access to Microsoft SQL Server to allow additional functions and features.	CEDA DCSD	N/A	Baseline	Baseline	Baseline	CEDA DCSD Internal Staff	PROPOSED - In process of establishing project start and end dates.
43	Pilot Project Web Access Server	Set up 180-day trial version of Microsoft Office Project Server 2007 for evaluation by DIT Program Strategy Office for managing projects. Facilitates resource (staff) utilization across projects and promotes management and staff visibility into project status.	DIT	N/A	Baseline	Baseline	Baseline	City Internal Staff	PROPOSED - In process of establishing project start and end dates.
44	Technology Refresh to Upgrade Desktops and Monitors	Implement Desktop Technology refresh for CEDA DCSD	CEDA DCSD	N/A	Baseline	Baseline	Baseline	CEDA DCSD Internal Staff	PROPOSED - In process of establishing project start and end dates.
45	Children's Fairland Telecommunication Services	Work with service provider to install approximately 250 liner feet of new conduit and two new manholes. Pull new cable in new conduit and existing conduit. Estimate cost is \$40,000.00.	Parks and Recreation	N/A	TBD	TBD	TBD	Parks and Recreation	INITIATION - In process of establishing project start and end dates.

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
46	Overhead Paging/Public Address System	install speakers with a zone system through-out 250 Frank Ogawa Plaza.	CEDA	N/A	TBD	TBD	\$20K	CEDA	INITIATION - In process of establishing project start and end dates.
47	Citywide Wireless	Finalize a wireless broadband assessment for the City of Oakland. Our mission is to define the most financially viable and sustainable municipal high speed wireless network option to increase digital inclusion and the economic advancement of Oakland's various constituencies.	Mayor's Office	Jul-07	11/9/2007	6/27/2008	\$150K CIP	Entire Oakland Community	PLANNING - Project Plan is developed. Technical Survey is distributed. Stakeholders Analysis will be conducted soon. Due to Subcontractor issues, the project did not start till December 2007
48	Payroll Time and Labor Self Service	Provide support for the rollout of self service timecard to all agencies and departments.	Finance	N/A	1/3/2008	6/3/2008	Baseline	All City agencies and departments	CLOSING - Rollout in progress.
49	Enterprise Reporting and Distribution (ERD) (Discoverer)	To empower Oracle users to build their own financial reports and develop libraries of most frequently requested reports for easy access.	City Administrator, Finance	N/A	6/12/2007	3/29/2008	Baseline	FMA Staff	Production implementation in progress.
50	Public Sector Budgeting (PSB)	Implement Oracle's Public Sector Budgeting application for the Budget Department as a replacement for the existing BRASS budget application.	City Administrator	Mar-08	8/1/2007	8/30/2008	TBD	All City agencies and departments	PROPOSED - Developing staff report for Council approval.
51	Oracle Support (Help Desk) Application	Implement Oracle's Support (Help Desk) application for the Department of Information Technology Help Desk. New Help Desk solution will be used as a replacement for the department's existing Help Desk system which is no longer supported by the software developer.	DIT	N/A	11/12/2007	5/30/2008	TBD	All City agencies and departments	INITIATION - Development of technical requirements in progress.
52	Payroll Mass Change (Grade Step Progression)	Apply and make operational the necessary functionality within the Oracle Human Resources/Payroll application to enable a workable solution for processing mass salary rates for all City of Oakland employees. Facilitate the process of downloading the salary details of the City's salaried employees, making updates to the rates, and uploading them back to the Oracle application	FMA	2/15/2008	3/15/2007	5/30/2008	\$75K	All City agencies and departments	Project was placed on-hold due to lack of Payroll staff resources. Project restarted on 04/15/08 and has a target completion date of 5/30/08.  Item: _____ Finance Management Committee

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
53	CORE	Develop interface to Spatial and Text Information to allow trained teams of Local Oakland Citizens to communicate and organize during an Emergency in their neighborhood	Fire	N/A	2/1/2008	6/30/2008	Baseline	Oakland Citizens	PLANNING - Awaiting OFD cleanup of Access Database records before loading data into GIS Oracle database.
54	Sidewalk Inventory GIS Data Viewer	Create an online application that displays sidewalk data from recently completed sidewalk inventory.	PWA	N/A	TBD	TBD	Baseline	All City agencies and departments	INITIATION - In process of establishing project start and end dates.
55	GIS /Reprographics Integration	Provide City employees access to GIS Map Gallery to allow for plotting of large plots.	DIT	N/A	TBD	TBD	Baseline	DIT Reprographics Staff	PLANNING - In process of establishing project start and end dates.
56	Firehouse Maps	Replace current City Maps in the Firehouses	OFD	N/A	TBD	TBD	Baseline	All Fire Stations	PLANNING - In process of establishing project start and end dates.
57	Technology Refresh	Upgrade the existing and aging Oracle server hardware and systems technology to accomplish building the infrastructure requirements for the implementation of Procurement Contracts (i.e. Procure-To-Pay project) and other Oracle Internet enabled applications. Refresh will also support the financial, budget and payroll processing for the next 3 to 5 years.	All City agencies and departments	TBD	5/14/2007	9/30/2008	TBD	All City agencies and departments	PLANNING - Preparing staff report for Council approval.
58	Develop WEB-Based Application Standards	Standardize application on the web to use the same programming language e.g. city Directory, Speaker Card, job classification, AI's, etc.	All city Agencies	N/A	7/1/2007	9/30/2008	TBD	All City agencies and departments	EXECUTION - Testing in progress.
59	AP Invoices and Statements	Implement AP Invoices and Statement processing. The new capability permits the finance agency staff to print invoices and statements using the Oracle Finance application module.	FMA	N/A	5/1/2007	2/29/2008	Baseline	All City agencies and departments	CLOSING - User training in progress.
60	Purchase Orders	Implement Purchase Order processing. The capability will permit the finance agency staff to print purchase orders.	FMA	N/A	5/1/2007	2/29/2008	Baseline	All City agencies and departments	CLOSING - User training in progress.

Item: \_\_\_\_\_

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
61	Payroll Checks and Deposit Advices	Implement payroll checks and deposit advice processing. The new capability will permit the finance agency staff to print payroll checks and deposit advices. The new process strengthens security for check printing and allows for additional automation features to be implemented in the future, such as printing of W2's and 1099R's.	FMA	N/A	TBD	TBD	TBD	All City agencies and departments	INITIATION - Payroll in the process of determine priority for this project.
62	Electronic Invoice Payments	Implement capability to pay vendor invoices electronically and establish electronic workflow to insure timely invoice payments in compliance with the City Council's "prompt payment" policy.	Contracting and Purchasing Department, FMA	N/A	TBD	TBD	Software in Baseline, Professional Services TBD	All City agencies and departments	PROPOSED - Approval of this project is pending.
63	Advanced Benefits	Implement a flexible, rules-based benefits administration application that enables improved benefits support and analysis through easy setup and process automation.	Personnel Dept.	N/A	TBD	TBD	Software in Baseline, Professional Services TBD	All City agencies and departments	PROPOSED - Approval of this project is pending
64	Learning Management (OLM)	Implement OLM to enable the HR/Personnel Department organization to manage, deliver, and track training participation in online or classroom-based environments. This project will automate processing for training delivery; from performance appraisals to training assessments - and keep tabs on learning and development. Personnel will be able to manage their own schedules, classes, and rosters and measure the effectiveness of learning activities and ensure alignment with the City's hiring, training, and skills improvement objectives. Personnel administrators can efficiently manage all learning catalog and related resources from a centralized system.	HR/Payroll, FMA, Personnel Dept	N/A	TBD	TBD	Software in Baseline, Professional Services TBD	All City agencies and departments	PROPOSED - Approval of this project is pending
65	Oakland/San Leandro Joint Web Sites	Working with the City of San Leandro to develop joint web sites.	City Council	N/A	12/1/2007	2/21/2008	Baseline	Oakland and San Leandro Citizens	EXECUTION - Testing of prototype in progress. Item: _____

No.	Project Name	Project Description	Partners	Council Approval	Start Date	Projected End Date	Budget	Numbers Served	Status
66	New cable service connection to the Police Administration building	The project will consist of installation of a new cable service connection to the police administration building. Install new cable to the demarcation point of the building and to all floors.	Police	N/A	1/15/2008	3/31/2008	\$38K OPD	Police	PLANNING - Waiting for an estimate
67	New cable service connection to the Animal Shelter	Project will consist of installation of new cable service connection at the animal shelter (1101 29th aver).	Police	N/A	1/15/2008	3/15/2008	\$10K OPD	Police	PLANNING - Waiting for an estimate

**DEFINITIONS:**

**Project** - A timebound IT activity to create a unique product, service or result. It requires various IT resources and has a minimum budget of \$50K. Any project having a budget smaller than \$50K is considered as a Small Project.

**Start Date** - Contract Signing, PO Issue, Kick-Off Meeting

**End Date** - Beginning of Maintenance and Support

**Proposed** - Not approved and in the process of conceptual planning. Funds are not identified

**Initiation** - RFP Development, Vendors Evaluation, Council Report and Approval

**Planning** - Scope development, Project, Resources and Timeline Planning of various phases of a project

**Execution** - Implementation, Integration, Testing, Training, Monitoring Performance

**Closing** - Final Acceptance Testing, Knowledge Transfer to Support, Fiscal Closing

**Department of Information Technology**  
**PCETS Status Report – April 2008**

<b>Project Name</b>	Permit & Code Enforcement Tracking system (PCETS)	<b>Project ID</b>	N/A
<b>Agency/Department</b>	Community & Economics Development Agency		
<b>Business Goals</b>	Replace the existing legacy system, and deploy an open architecture, web based application		
<b>Impact on Oakland Residents</b>	E-Commerce: search and purchase documents on-line, schedule inspection		
<b>Public Accessible</b>	YES		
<b>Council Approval Date</b>	June, 2005	<b>Contract Signing</b>	September, 2005
<b>Kick Off Meeting</b>	February, 2008	<b>Project Start Date</b>	February, 2008
<b>Project End Date</b>	N/A	<b>Target Completion</b>	September, 2009
<b>Project Sponsor</b>	Dan Lindheim		
<b>Project Manager</b>	Mohssen Yassini		
<b>Budget \$</b>	\$780K	<b>Funding Source</b>	CIP
<b>Scope and Project Description</b>	<p>Municipal Software Corp. (MSC) will be responsible for delivering the Permit &amp; Code Enforcement Tracking System component and interfacing it with Image Source's Electronic Document Management System (EDMS) component to form Permit Enforcement &amp; Record Tracking System (PERTS).</p> <p>In its full-production environment, Permit &amp; Code Enforcement Tracking System, as combined with EDMS, will be used by the departments within CEDA (Planning, Building, Housing, Redevelopment, and Administration), and to a more limited extent, other City agencies (City Manager, Public Works, Finance, etc.).</p>		
<b>Stage</b>	Initiation		
<b>Issue and Challenges</b>	<ol style="list-style-type: none"> <li>1. Scheduling building services staff time to review the design documents that are prepared jointly by City and Municipal Software</li> <li>2. Scheduling Municipal Software Resource time to go over questions and comments</li> <li>3. Building services staff shortage made it impossible for document review and turn-around in a timely manner to Municipal Software</li> </ol>		

Attachment D

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Finance and Management Committee  
May 13, 2008

	<ol style="list-style-type: none"> <li>4. Building services staff ability to embrace and envision the change and understand the new application functionalities for maximum business process optimization</li> <li>5. Municipal Software Corp. change in methodology of system delivery and moving toward pre-build application, created months of delay in negotiation and GAP analysis</li> <li>6. City's implementation of the new Central Cashiering system caused scope change in Permit &amp; Code Enforcement Tracking System</li> <li>7. Concurrent projects requiring IT Managers time and attention for staff supervision, day to day IT Section operation and support, hardware and software acquisitions</li> <li>8. Lack of resource such as business analyst and administrative assistance to assist in data gathering, scheduling, and documenting changes to be communicated to Municipal Software</li> <li>9. Successful completion of EDMS phase of the Permit Enforcement &amp; Record Tracking System project (May 2006), created tremendous amount of user demands for support, managing the central scanning stations (5), and system administrative tasks on a daily basis.</li> <li>10. Addition of new projects such as: Housing Development Software to replace existing Loan Servicing Application, Move of all CEDA production servers to the Emergency Operating Center and upgrade of production software.</li> </ol>
<p><b>Status</b></p>	<p><b>Chronological Events</b></p> <p>December 2003 - Council approval and award of the contract to Xerox &amp; Municipal Software.</p> <p>February 2004 – Start negotiation with both vendor</p> <p>August 2004 – Despite its best efforts, the Team's negotiations with Xerox have reached an impasse. Project team prepared another staff report for council to authorize City Administrator to negotiate with Image Source Inc., and Municipal Software</p> <p>June 2005 – Council authorization to negotiate and execute a Contract, with Municipal Software Corporation for Professional Services to provide, Install, and License Proprietary Computer Software for a Permit &amp; Code Enforcement Tracking System (PCETS) in an amount not to exceed \$780,000.00.</p>

September 2005 – Phase 1a, risk free proof of concept demonstration of integration of Stellent with City View - by Image Source Inc., and Municipal Software. Following a successful demonstration of functionality, contract was signed with both vendors.

November 2005 - Municipal Project Manager, Data Analyst and their programmer came on-site for a fact finding and discovery visit to Oakland. By this time Municipal Software had changed their business philosophy and model by moving toward the Prebuilt application instead of total customization. During this visit, Municipal Software did a walkthrough of the functionality within the City View (CV) Prebuilt modules, and expressed the desire for Oakland to look at it and see if it will meet our needs out of the box.

Feb 2006 - Three days user training was given to building services Subject Matter Expert on the functionality of the Prebuilt software for Code Enforcement, Permits & Inspections, and Planning modules in preparation for the GAP analysis.

April 2006 – Municipal project manager and the business analyst on site for two weeks to perform data collection to build a GAP Analysis and discover the extent of customization required if Oakland agrees to accept the Prebuilt. Gapes relate to functionality needed by the City which was determined to be missing within a specific Prebuilt.

July 2006 – Project Definition Documents were sent to Oakland Project team for review. This document was quiet confusing to staff as they did not understood why this system was not going to mimic the existing Permit Tracking System and that they had to change their business process to match the application. After further review, the project team was able to see the benefits of total consolidated Permit and Code Enforcement application. Elimination of errors and duplication of data entry and optimizations that was put in place in Municipal Software (MS) Prebuilt package was very attractive and pretty much what we have hopped for in the new system. One area that the City and the Municipal Software could not agree upon was the customization of the presentation layer. Municipal Software wanted to minimize customization as much as possible for future upgrades and new software release.



August 2006 - A site visit was conducted to gather detailed infrastructure information and verify information where appropriate as part of the Infrastructure Review per Statement Of Work.

October 2006 – Municipal Software President and the VP met with Oakland project team and Claudia Cappio CEDA director to discuss their desire to change the scope of the project and deliver the planning module which is about 90% acceptable by planning department and that could be a quick win for the project. The project team rejected their offer and reminded Municipal software that the driver behind this project is the Code Enforcement and Permit application.

January 2007 – A new project manager was assigned to Oakland account. Project status was reviewed, including confirmation of project deliverables, contract and SOW, and timelines.

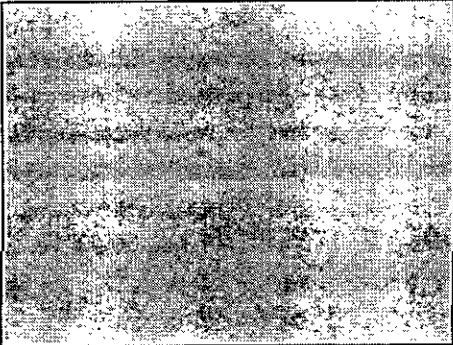
March 2007 – City implemented a new central cashiering system by Active Network (Point Of Sale or POS)

May 2007 – Umbrella Project Plan was produced and signed by Oakland Project Manager. Phase III of the Permit & Code Enforcement Tracking System project started.

June 2007 – Municipal project manager and data analyst on-site for detailed gap analysis and final requirements gathering as part of Phase III.

October 2007 – Project Definition Documents were released to CEDA building services staff for review, also at this time Municipal Software demonstrated the new scheduling module that was developed in Microsoft Outlook. CEDA needs to further discuss and approve the new scheduling module

December 2007 – Comments on Project Definition Documents were scanned and sent to MSC for review and comments



April 2008 – Review of Code Enforcement module Project Definition Document completed

Items where the work is underway and/or are tabled for further discussion are as follow:

- Cashiering system and interface with Point Of Sale
- Outlook inspection scheduling
- *GIS interface*
- Data conversion