



# County of Orange ~ Information Technology

## Quarterly IT Project Status Detail Report

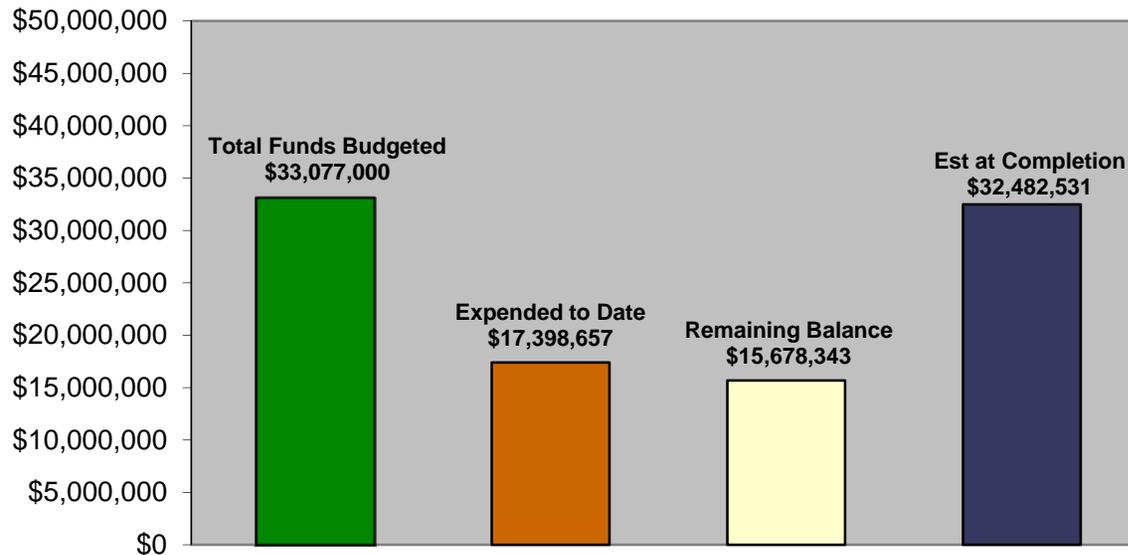
### Fiscal Year 2014-15, 1st Quarter

#### Executive Summary

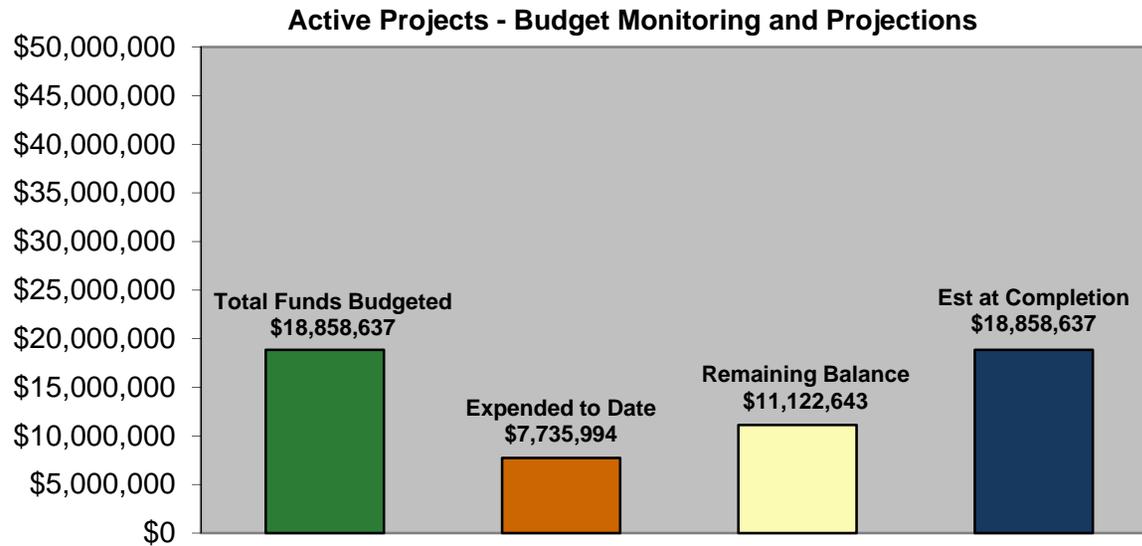
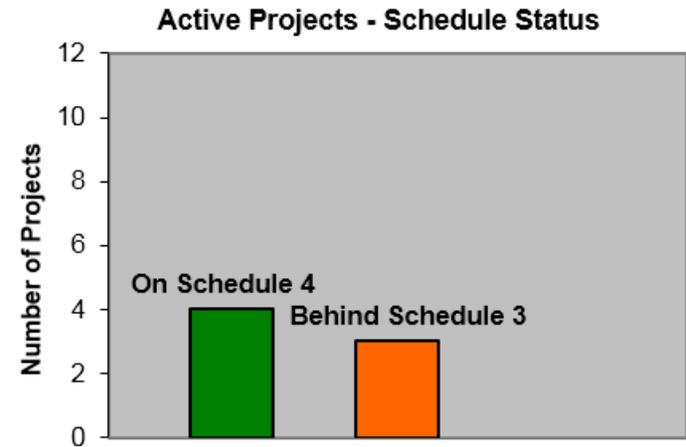
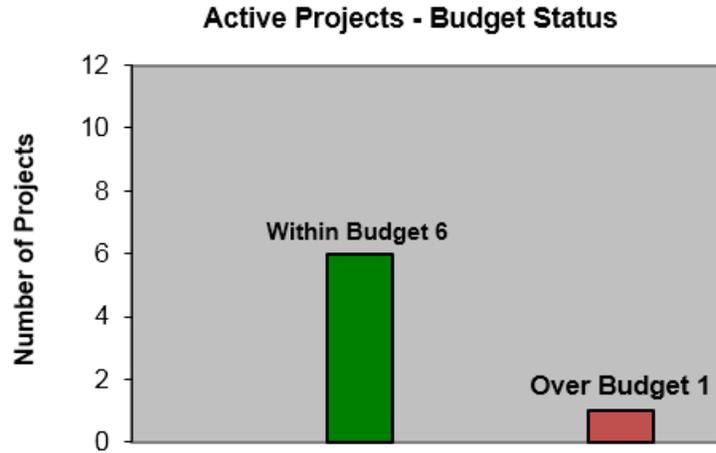
The Quarterly IT Project Status Detail report provides an inventory of all County IT projects with a budget of \$150,000 or more and/or that have been identified as being significant during the 1st quarter reporting period of July 1 – September 30, 2014. The report includes a project description, high-level summary of the budget and schedule status, and key accomplishments during the reporting period.

IT Projects	Budgeted Funds	Expended to Date	Remaining Balance	Estimated at Completion	Within or Under Budget	Over Budget	Revised Budget	On or Ahead of Schedule	Behind Schedule	Revised Schedule
7 Active	\$18,858,637	\$7,735,994	\$11,122,643	\$18,858,637	6	1	-	4	3	-
3 Completed	\$14,218,363	\$9,662,663	\$4,555,700	\$13,623,894	-	-	-	-	-	-
0 Future	\$0	\$0	\$0	\$0	-	-	-	-	-	-
<b>10 Total Projects</b>	<b>\$33,077,000</b>	<b>\$17,398,657</b>	<b>\$15,678,343</b>	<b>\$32,482,531</b>	<b>6</b>	<b>1</b>	<b>-</b>	<b>4</b>	<b>3</b>	<b>-</b>

**Total Projects - Budget Monitoring and Projections**



**7 Active Projects - Budget and Schedule Summary**



**Quarterly IT Project Status Report Detail**  
**1st Quarter, July - September 2014**

#	Department	Project Name / Project Number	Status B / S *	Funding Source	Original Approved Budget	Expended/ Encumbered Funds to Date	Remaining Balance	Estimated Cost at Completion	DESIGN	BUILD
					<u>Actual Budget</u>				<u>Original Schedule</u>	<u>Original Schedule</u>
<b>ACTIVE PROJECTS – ASSESSMENT TAX SYSTEM CATEGORY</b>										
1	Auditor/Controller <b>NEW</b> Project Manager: Larry McCabe - A/C M. Campbell - CEO/IT	<b>CAPS+ AIX Replacement</b> <b>Project: P091052</b>	1/1	014	\$1,931,141 <u>\$1,931,141</u>	\$0	\$1,931,141	\$1,931,141	Jul 2014 - Aug 2014 <u>July 2014 - Aug 2014</u>	Sep 2014 – April 2015 <u>Sep 2014 – April 2015</u>
	Description:	The County's CAPS+ Systems currently resides on an IBM P595 platform. The platform is over nine (9) years old and has reached its end of life and is beginning to experience system failures. Replacing the platform with two new IBM AIX P8 systems was planned and approved in the FY 2014-15 budget process. The County's managed services provider, SAIC, will be replacing the platform under work order number CY1-010. The County will also need to move the CAPS+ FS and HR software to the new IBM AIX P8 platforms and has contracted with CGI Technologies and Solutions for this effort. The CGI contract also includes a provision for CGI to train County staff and provide detailed process documentation so future installations of software can be performed by County staff.								
	Schedule Phase:	Build Schedule – Executing/Controlling								
	Key Accomplishments:	During this quarter, a work order was signed with SAIC to provide the new AIX hardware platforms. A contract was also established with CGI to provide the CAPS+ HR and FS Advantage software installations and data migrations. SAIC began the implementation of the new production servers. This is running slightly behind schedule. SAIC is relying upon Xerox to supply network services for this upgrade via service requests. Due to the volume of security requests, this is challenging. To help mitigate, longer lead times on service requests is being provided to Xerox, with weekly meetings to discuss requirements. The project team (County, SAIC, and Xerox) is working hard to mitigate any impact to the project schedule.								
	Schedule/Budget Note:	The project is currently on budget. Certain tasks are slightly behind schedule but the project should still be able to meet the overall schedule. <b>[See the detailed Risk Assessment Report for this project.]</b>								
<b>Assessment Tax System Category Total</b>					<b>\$1,931,141</b>	<b>\$0</b>	<b>\$1,931,141</b>	<b>\$1,931,141</b>		

\*Status Code      Budget Status (B):    0 – Under Budget    1 – Within Budget    2 – Over Budget    3 – Revised Budget (approved project/budget change)  
Schedule Status (S):    0 – Ahead Schedule    1 – On Schedule    2 – Behind Schedule    3 – Revised Schedule

**Quarterly IT Project Status Report Detail**  
**1st Quarter, July - September 2014**

#	Department	Project Name / Project Number	Status B / S *	Funding Source	Original Approved Budget	Expended/ Encumbered Funds to Date	Remaining Balance	Estimated Cost at Completion	DESIGN	BUILD
					<u>Actual Budget</u>				<u>Original Schedule</u>	<u>Original Schedule</u>
<b>ACTIVE PROJECTS – CEO CATEGORY</b>										
2	CEO/IT	<b>Countywide Identity Management – Phase I &amp; Phase II (OCid)</b> <b>Project: P090979</b>	2/2	289	\$728,030 <u>\$908,127</u>	\$929,113	(\$20,986)	\$908,127	July 2011 – Dec 2011 <u>July 2011 – Dec 2011</u>	Jan 2012 – Jun 2013 <u>Jan 2012 – Dec 2014</u>
	<b>Project Manager:</b> Mai Le									
	<b>Description:</b>	<p>Phase I - This project deploys an efficient enterprise approach to the management of County users and their access to County IT systems and applications. The project leverages user self-service workflows to establish/manage unique identities for all County workforce members so that they can login to both County and non-County systems and applications with fewer usernames and passwords, while also ensuring County has accurate contact information and meets new regulatory compliance requirements. This phase includes implementation of the new Identity Management platform and application, HR database synchronization, roll-out to several Agencies, and the establishment of specifications for Agencies to integrate their internal applications.</p> <p>Phase II – This extends the accomplishments of Phase I to expand the scope of application integrations to the Identity Management directory and provide new single sign-on capabilities. It also enhances the ability for County IT to control user access to County systems, meet Security compliance requirements and reduces the amount of support required for password resets and other user account management.</p>								
	<b>Schedule Phase:</b>	Build Schedule – Executing/Controlling								
	<b>Key Accomplishments:</b>	The OCid directory is in production and is being used to authenticate users to the Central IT Service Desk. This quarter, standards for employee data that must be synchronized across Agencies were completed and approved through the Technology Council. The project team is working with Agencies to adopt these standards and implement procedures/processes to maintain them, further improving the accuracy of “people” data in the OCid user directory. Work continued to integrate the other Enterprise applications to OCid, including the new Enterprise SharePoint employee portal, IntraOC, and the County’s new VoIP solution. This will enable single sign-on for these applications.								
	<b>Schedule/Budget Note:</b>	The project is over budget due to unexpected resource demands. Project is on target to meet the revised December 2014 completion.								
3	CEO/IT	<b>Enterprise SharePoint Portal Design and Implementation</b> <b>Project: P090704</b>	1/2	038	\$497,730 <u>\$497,730</u>	\$497,730	\$0	\$497,730	Jul 2012 – Sep 2012 <u>Sep 2012 – Feb 2014</u>	Sep 2013 – Dec 2013 <u>Feb 2014 – Dec 2014</u>
	<b>Project Manager:</b> Lynne Halverson									
	<b>Description:</b>	This project includes the design and implementation of an Enterprise SharePoint Portal (Employee Collaboration). This includes the implementation of a SharePoint technical solution as a foundation for Enterprise SharePoint availability Countywide. This project also includes the redesign of the existing County Intranet (“blue screen”); enabling of baseline taxonomy, governance and standard SharePoint features; and establishing SharePoint Administration and Operation & Maintenance protocols.								
	<b>Schedule Phase:</b>	Build Schedule - Executing/Controlling								
	<b>Key Accomplishments:</b>	The Beta user group was enabled in August 2014. Content migration from the old County Intranet to the new IntraOC site is ongoing. By calendar year-end 2014, approximately 90% of County staff will be licensed to access IntraOC. General deployment launch has been delayed by two primary factors: County concerns regarding information security and the need for better understanding of the points of integration and separation with the Office 365 environment. IntraOC can be deployed as soon as the County Security Officer and Office 365 Steering Committee have completed due diligence and provided approvals to move forward. While approvals are pending, Phases II & III of the project will be initiated.								
	<b>Schedule/Budget Note:</b>	The project is on budget. The full launch is being revised from August to December 2014 pending resolution of larger security concerns and the County’s Office 365 strategic approach.								

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**Quarterly IT Project Status Report Detail**  
**1st Quarter, July - September 2014**

#	Department	Project Name / Project Number	Status B / S *	Funding Source	Original Approved	Expended/ Encumbered	Remaining Balance	Estimated Cost at Completion	DESIGN	BUILD
					Budget	Funds to Date			Original Schedule	Original Schedule
					<u>Actual Budget</u>				<u>Actual Schedule</u>	<u>Actual Schedule</u>
ACTIVE PROJECTS – CEO CATEGORY										
4	CEO/IT <b>NEW</b> Project Manager: Lynne Halverson	<b>Enterprise SharePoint Phases II &amp; III</b>  <b>Project: P091071</b>	1/1	038	\$800,000 <u>\$800,000</u>	\$53,549	\$746,451	\$800,000	Sep 2014 – Feb 2015 <u>Sep 2014 – Feb 2015</u>	Jan 2015 – Jun 2015 <u>Jan 2015 – Jun 2015</u>
	Description:	Enterprise SharePoint Project Phases II-III: Collaboration - Consolidation will build on the baseline services established during Phase I to enable features and functionality that have been identified by the County as being of high value to the enterprise. Phases II-III will also include implementation of an Enterprise Adoption and Training program to ensure that employees have opportunity to gain the basic skills they'll need to make use of the Enterprise SharePoint portal as well as the selection and implementation of enhanced tools for use in site administration; workflow design and automation; metadata management; and business intelligence and reporting.								
	Schedule Phase:	Design - Initiating								
	Key Accomplishments:	CEO/IT has developed and signed a Scope of Work with SAIC for the development of additional primary functionality on the site as well as support for expanded baseline user training. The project team will be coordinating with SAIC in October 2014 to move forward with project initiation and planning.								
	Schedule/Budget Note:	The project is on budget and on schedule.								
5	CEO/IT  Project Manager: Jim Mata	<b>Voice &amp; Data Network Transformation</b>  <b>Project: P090993</b>	1/2	289	\$13,765,191 <u>\$13,765,191</u>	\$6,194,336	\$7,570,855	\$13,765,191	Sep 2013 – Mar 2014 <u>Sep 2013 – Mar 2014</u>	Mar 2014 – Apr 2016 <u>Mar 2014 – Apr 2016</u>
	Description:	This project includes the design and implementation of the new Countywide, converged Voice and Data Network. During this project, the voice and data network that is in place today will be replaced with a single, streamlined network that will handle both voice (telephones) and data. This will allow the County to eliminate duplicate circuits and maintenance costs, while increasing the network capacity to support County business requirements now and into the future. During this project, County users will receive new phone equipment and training to ensure a smooth transition.								
	Schedule Phase:	Build Schedule – Executing/Controlling								
	Key Accomplishments:	During this quarter, power upgrades were completed at all but two Phase 0 sites, and Phase 1 power surveys are underway. Time Warner Telecom has pulled the new circuits into Phase 0 sites and has begun working on Phase 1 sites. Local Area Network (LAN) cabling surveys were completed for Phase 0 sites and surveys of Phase 1 buildings are in progress. New LAN cabling has been installed in two buildings. The Wide Area Network (WAN) transformation has also progressed. Xerox's new WAN has been established at five sites, with six more coming online within the next 60 days. Transformation of core network services, including the implementation of the new Web filtering policy and tool, Bluecoat, is also in progress.								
	Schedule/Budget Note:	The new redundant VoIP core was completed and is ready to support conversion of County sites to the new phone system. The VoIP system has been integrated with OCid (the County's Identity Management system) to enable a County telephone directory. Four sites are scheduled to be converted to the new VoIP system by calendar year-end.								
	Schedule/Budget Note:	Project is on budget; however, scope changes may increase budget. To date, \$1,376,519 has been expended, while \$4,817,817 was encumbered this fiscal year. The County is meeting with Xerox regarding schedule delays and revised dates for key milestones. These will be presented to the Board next quarter. <b>[The detailed Risk Assessment Report for this project will be provided next quarter.]</b>								
<b>CEO Category Total:</b>					<b>Original Budget</b>	<b>\$15,790,951</b>				
					<b>Actual Budget</b>	<b>\$15,971,048</b>	<b>\$7,674,728</b>	<b>\$8,296,320</b>	<b>\$15,971,048</b>	

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**Quarterly IT Project Status Report Detail**  
**1st Quarter, July - September 2014**

#	Department	Project Name / Project Number	Status B / S *	Funding Source	Original Approved Budget <u>Actual Budget</u>	Expended/ Encumbered Funds to Date	Remaining Balance	Estimated Cost at Completion	<i>DESIGN</i> Original Schedule <u>Actual Schedule</u>	<i>BUILD</i> Original Schedule <u>Actual Schedule</u>
ACTIVE PROJECTS – AGENCY/DEPARTMENT CATEGORY										
6	Public Defender <b>NEW</b> Project Manager:	<b>Case Management System</b> <b>Project: P091080</b>	1/1	038	\$790,000 <u>\$790,000</u>	\$0	\$790,000	\$790,000	Sep 2014 – June 2015 <u>Sep 2014 – June 2015</u>	TBD <u>TBD</u>
	Description:	The Public Defender is developing a Request for Proposal (RFP) for a new case management application designed for Public Defender offices that has the ability to integrate with other Justice Partners (i.e. District Attorney, Courts, etc.). The project will include the RFP process, system selection, installation, data migration and implementation of the new system.								
	Schedule Phase:	Design Phase – Preparation of Request For Proposal								
	Key Accomplishments:	During this quarter, the project team worked on defining the requirements of the new system. The team also worked with CEO/IT Procurement in creating the Request For Proposal.								
	Schedule/Budget Note:	The project is currently on budget and on schedule. The build schedule will be developed when the vendor is selected and a contract award is completed.								
7	Social Services Agency <b>NEW</b> Project Manager:	<b>SSA Data Center Move to OCDC</b> <b>Project: P091076</b>	1/1	Fed-38.4%, State-55.3\$, County-6.3%	\$166,448 <u>\$166,448</u>	\$61,266	\$105,182	\$166,448	May 2014 – Aug 2014 <u>May 2014 – Aug 2014</u>	Sept 2014 – Nov 2014 <u>Sept 2014 – Nov 2014</u>
	Description:	SSA's server room and data assets are currently housed in a building that was built in 1965, providing little or no protection against considerable seismic events and power outages. SSA's Information Technology Department's goal is to move these data assets to the OC Data Center (OCDC), which is a more secure environment that will provide protection against seismic events up to 8.0 earthquakes, unscheduled power outages, and safeguarding of data by way of 24/7 physical security. The move will align SSA with efforts towards more efficient use of county resources and disaster preparedness.								
	Schedule Phase:	Build – Executing								
	Key Accomplishments:	SSA IT has completed the preliminary planning phases of server moves to the OCDC. Successful testing has enabled the project to move forward.								
	Schedule/Budget Note:	Project is on budget and on schedule.								
<b>Agency/Department Category Total: Original Budget</b>					<b>\$956,448</b>					
					<b>Actual Budget</b>	<b>\$956,448</b>	<b>\$61,266</b>	<b>\$895,182</b>	<b>\$956,448</b>	
<b>All Active Project Categories as of 09/30/2014</b>										
<b>Active Project Grand Total Original Budget</b>					<b>\$18,678,540</b>					
					<b>Actual Budget</b>	<b>\$18,858,367</b>	<b>\$7,735,994</b>	<b>\$11,122,643</b>	<b>\$18,858,637</b>	

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**Quarterly IT Project Status Report Detail**  
**1st Quarter, July - September 2014**

#	Department	Project Name / Project Number	Status B / S *	Funding Source	Original Approved Budget <u>Actual Budget</u>	Expended/ Encumbered Funds to Date	Remaining Balance	Estimated Cost at Completion	<i>DESIGN</i> Original Schedule <u>Actual Schedule</u>	<i>BUILD</i> Original Schedule <u>Actual Schedule</u>
<b>COMPLETED PROJECTS</b>										
8	CEO Budget	<b>BRASS to Performance Budgeting Upgrade</b> <b>Project: P090973</b>	0/2	Fund 279 – OCWR (to be repaid by the General Fund)	\$1,700,000 <u>\$1,700,000</u>	\$1,105,531	\$594,469	1,105,531	Jun 2013 – Sep 2013 <u>Jun 2013 – Sep 2013</u>	Sep 2013 – Jan 2014 <u>Sep 2013 – Aug 2014</u>
	<b>Project Manager:</b> Mitch Tevlin									
	Description:	Upgrade the existing Countywide budgeting information system, BRASS, to Performance Budgeting (PB). BRASS has been utilized for preparing County budgets and Strategic Financial Plans since 2002. This upgrade includes best in breed software and state of the art hardware that will provide the foundation for Countywide budgeting for the next ten years.								
	Schedule Phase:	Build Schedule – Closing								
	Key Accomplishments:	During this quarter, final system configuration, report development and user training were completed and the system was used to prepare the 2014 Strategic Financial (SFP) Plan in August. Budget reports are in progress and will be ready for use during the FY 2015-2016 budget development cycle.								
	Schedule/Budget Note:	The project was completed under budget and within the revised schedule.								
9	CEO/Risk Management	<b>Risk Management Information System</b> <b>Project: P090994</b>	1/1	Fund 294 Property & Casualty ISF	\$206,169 <u>\$206,169</u>	\$206,169	\$0	\$206,169	Jan 2014 – Jun 2014 <u>Jan 2014 – Jun 2014</u>	Jul 2014 – Aug 2014 <u>Jul 2014 – Aug 2014</u>
	<b>Project Manager:</b> Quazi Hashmi									
	Description:	CEO/Office of Risk Management plans to leverage the Risk Management Information System in order to effectively manage the Liability Self-Insurance Program and improve operational efficiencies through automation, system designed workflows and business rules as well as enhanced reporting capabilities. County Agencies/Departments will be provided with more comprehensive and informative reports regarding their loss activities and trends to aid them in their loss prevention efforts. They will be able to use this information to identify problem areas and high cost claims and implement operational changes in order to reduce both the frequency and severity of liability claims. This project will be implemented in one phase.								
	Schedule Phase:	Build Schedule – Complete								
	Key Accomplishments:	During this quarter, the system build, testing, training and deployment were completed. Major milestones included legacy data migration and full application integration between different modules. The system went live in July 2014.								
	Schedule/Budget Note:	The project was completed on budget and on schedule								

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**1st Quarter, July - September 2014**

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					Actual Budget				Actual Schedule	Actual Schedule
<b>COMPLETED PROJECTS</b>										
10	Health Care Agency	<b>Behavioral Health Services Electronic Health Records – Phase 1 of 3</b> <b>Project: P090837</b>	1/1	MHS Act Prop 63-84%; State-8% Federal-2% Fees/Licenses /Other-4% NCC- 2%	\$12,312,194 <u>\$12,312,194</u>	\$8,350,963	\$3,961,231	\$12,312,194	Jan 2009 – Sep 2012 <u>Jan 2009 – Sep 2012</u>	Oct 2012 – June 2014 <u>Oct 2012 – June 2014</u>
	<b>Project Manager:</b> Adil Siddiqui									
	Description:	The overall objective of the EHR project is to develop and implement a completely integrated and interoperable Electronic Health Records (EHR) system for Behavioral Health Services. The system will allow Behavioral Health Services to transition from a paper-based clinical documentation management system to an electronic system. Development and implementation will occur in 3 phases, and is expected to complete in 2016. Phase 1 is expected to end in the first quarter of 2014, and includes primarily additional Cerner-based solutions and services, equipment, software and services that will follow the County's bid process. The EHR system includes all functional requirements developed by the Agency and will comply with all state and federal requirements and guidelines including HITECH Meaningful Use, HIPAA, and Privacy and Security. The cost for all 3 phases is budgeted at \$22,902,863.								
	Schedule Phase:	Build – Closing								
	Key Accomplishments:	During this quarter, fine-tuning of the system was completed and HCA signed off on the project acceptance.								
	Schedule/Budget Note:	The project was implemented on budget and on schedule. Final acceptance and payment was provided to the vendor following the completion of non-critical system issues. This phase of the project is completed. Phase 2 will be reported next quarter. <a href="#">[See the detailed Risk Assessment Report for this project.]</a>								
<b>Completed Projects Total Original Budget</b>					<b>\$14,218,363</b>					
<b>Actual Budget</b>					<b>\$14,218,363</b>	<b>\$9,622,663</b>	<b>\$4,555,700</b>	<b>\$13,623,894</b>		
<b>All Active, Closed &amp; Future IT Projects as of 09/30/2014</b>										
<b>Grand Total Original Budget</b>					<b>\$32,896,903</b>					
<b>Actual Budget</b>					<b>\$33,077,000</b>	<b>\$17,398,657</b>	<b>\$15,678,343</b>	<b>\$32,482,531</b>		

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