

General Services Work Order Tracking System

May 22, 2012



Project Summary

This project will generate a framework which the General Services staff can use for the planning and implementation of the Work Order tracking system.

The project will generate a PowerPoint presentation that will:

- * Present the Project Management documents
- * Outline General Services Section's requirements
- * Recap the various systems the project team reviewed
- * Provide a comparison of the systems
- * Present the recommended system

Project Goal

This project will identify a framework and recommendation for a Work Order tracking system that will:

- * Be the one consolidated system
- * Have a single point access for requesters and technicians
- * Have four (4) preset reports
 - o Requests by Location
 - o Requests by Type
 - o Requests by Status (Aging Report)
 - o Technician Utilization

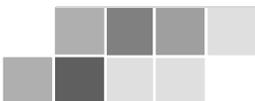
Project Outcome

The project team will be responsible for the delivery of:

- * PowerPoint Presentation
- * Project Plan Documents
 - o Charter
 - o Scope
 - o Work Breakdown Structure
 - o Schedule
 - o Risk Management Plan
 - o HR Plan
 - o Communications Plan
 - o Cost Management Plan
 - o Quality Management Plan
- * General Services Work Order Project Framework
 - o Charter
 - o Scope
 - o Work Breakdown Structure
 - o Research
 - o Evaluation Form
 - o Recommendation

Project Benefits

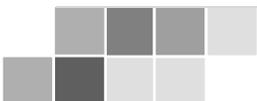
This project will analyze the current General Services procedures and identify the strengths and weaknesses. Solutions to the shortfalls of the current system will be compiled and analyzed one by one. Solutions will be tested and compared against each other. A recommendation will be presented to the General Services Section along with all project documents and analysis documentation. A large portion of the work required to complete a project in which the General Services Section would implement a new work order tracking system is completed. This will save the General Services Section time, money, and energy when the General Services Section starts this project.



Project Team

For more information about this project, contact team members:

- Barbara Taylor — Taylor, Barbara <barbara.taylor@das.state.oh.us>
- Dennis Morgan — Morgan, Dennis <Dennis.Morgan@odrc.state.oh.us>
- Laverne Gordon — laverne gordon <laverne.gordon@ic.state.oh.us>
- Shavkat Nasirov — Shavkat Nasirov <Shavkat.Nasirov@ohioattorneygeneral.gov>
- David Howe — David Howe David.Howe@ohioattorneygeneral.gov
- Nelson Gonzalez – Mentor / Coach





Project Charter

PROJECT TITLE AND DESCRIPTION: **General Services Work Order Request System**

Currently, the General Services Section keeps track of all work requests by using the email system. The various departments within the section are responsible for assessing, resolving and tracking the work. Each department tracks its work requests by using a combination of worksheets and word documents. The current process has proven to be inefficient in its tracking and reporting.

To remedy the situation, the section would like to develop/purchase and implement a system that would:

- Be centralized and easily accessible by all in the section
- Provide departments a means of tracking requests
- Distribute the work according to the type of work requested
- Provide detailed and overview reports
- Incorporate a mechanism for ad hoc reporting
- Be incorporated into the emailing system
- Allow requesters to easily assess the current status of the request
- Provide requesters confirmation that the work was completed

PROJECT MANAGER(S) ASSIGNED:

David Howe
Shavkat Nasirov

ACCEPTANCE CRITERIA:

- The system should incorporate auto-routing process that will assign the work to the appropriate technician or queue.
- The system should allow the technician to record notes.
- The system should allow the work to be track able according to the type of work, location of the work, and the technician to which it is assigned.
- The number of reports from the new process should increase.

BUSINESS CASE:

The General Services section has a need for an efficient work order request tracking and reporting system. The current system has proven to be inefficient by requiring duplication of work, manual entry of work request in spreadsheets, tracking work via email, and relying on reports that are derived from the spreadsheets.

PROJECT COST ANALYSIS:

The following items may incur costs for this project

- Tracking software
- IT application development
- Database Administration for importing all current data
- General Services Staff time during implementation of the system

PRODUCT DESCRIPTION / DELIVERABLES:

The project will provide the General Services Section with a work order request tracking and reporting system. This system must:

- Be centralized and easily accessible by all in the section
- Provide modules for the following departments:
 - o Mail Services
 - o Owned Facilities Maintenance
 - o Leased Facilities Maintenance
 - o Office and Furniture Moves
 - o New Asset Requests
 - o Fleet Requests
 - o Miscellaneous Requests
- Allow management to monitor access to modules within the system
- Provide each department a means of tracking requests
- Distribute the work according to the type of work requested
- Provide detailed and overview reports
- Incorporate a mechanism for ad hoc reporting
- Allow requesters to easily assess the current status of the request
- Provide requesters confirmation that the work was completed

RISKS AND/OR ASSUMPTIONS:

The following risks have been identified

- The requested budget for Fiscal Year 2013 may not include money for the project
- The budgeted software costs exceed \$25,000, thus requiring approval from the Chief Operating Officer
- The system is not user-friendly and is difficult to learn

The following assumptions have been made:

- The solution the project team proposes will be acceptable by the sponsor
- Implementation will allow for a smooth transition

SIGNED AND APPROVED BY:

John LeVitt
Director of General Services
Ohio Attorney General's Office

Project Name: AGO GS Work Order Tracking System Implementation

Project Sponsor: John Levitt

Agency Name: Ohio Attorney General

Project Manager: Barbara Taylor

Project Team: Laverne Gordon

David Howe

Dennis Morgan

Shavkat Nasirov

Date Drafted: 4/24/2012

Project Closure Report Version Control

Version	Date	Author	Change Description
1.0	4/24/2012	Project Team	Document Created
1.1	5/1/2012	Project Team	Updated Project Deliverables

Project Justification

The General Services section has a need for an efficient Work Order request tracking and reporting system. The current system has proven to be inefficient by requiring duplication of work, manual entry of the work request into spreadsheets, tracking work via email, and relying on reports that are derived from the spreadsheets.

Project Product

This project will consolidate and standardize the Work Order tracking system for the General Services Section of the Ohio Attorney General's Office. This will reduce and resolve the inadequacies of the current procedures used to track work by the individual departments within the section.

The implementation of the recommended system will:

- Track the Work Order according to the type of work, location of the work, and the technician to which it is assigned.
- Incorporate an auto-routing process which will assign the work to the appropriate technician or group.
- Allow technicians to record notes and to update the Work Order.
- Allow management to run preset and ad hoc reports.

Project Deliverables

The project will provide the General Services Section with a recommended Work Order request tracking and reporting system. This recommended system must:

- Be centralized and easily accessible by all in the section
- Allow requesters (AGO employees) to enter requests directly into the system
- Allow technicians to provide feedback to requesters
- Provide requesters confirmation that the work was completed
- Provide tracking of work orders for the following departments:
 - o Facilities Maintenance
 - o Office and Furniture Moves
 - o Alterations
 - o Copy Center
 - o Mail Services
 - o Pool Vehicle Requests
- Allow management to monitor access to requests within the system
- Distribute the work according to the type of work requested
- Provide detailed and overview reports
- Incorporate a mechanism for ad hoc reporting

The project will also deliver:

- Research materials
- Procurement Plan
- Human Resource Management Plan
- Customization Plan
- Implementation Plan

Project Objectives

This project will identify a system which will be built or bought and will be implemented with the following objectives:

- Will be within the budgeted funds
- Will be the one consolidated system
- Will have a single point access for requesters and technicians
- Will have 4 preset reports
 - o Requests by Location
 - o Requests by Type
 - o Requests by Status (Aging Report)
 - o Technician Utilization

Identified Risks

- The requested budget for Fiscal Year 2013 may not include money for the project
- The budgeted software costs exceed \$25,000, thus requiring approval from the Chief Operating Officer
- The system is not user-friendly and is difficult to learn

Assumptions/Constraints

- The solution the project team proposes will be acceptable by the sponsor
- Implementation will allow for a smooth transition

Project Requirements

System must be supported by Information Technology Section or Vendor

Scope Exclusions

Entry will not be email based

The following departments will not be covered

- Fleet Management
- Asset Management
- Purchasing

Section Chief's approval process

Established Budget

- \$25,000 for initial set-up / purchase

Work Breakout Structure –

Please See Attachment

Overall Project Priority

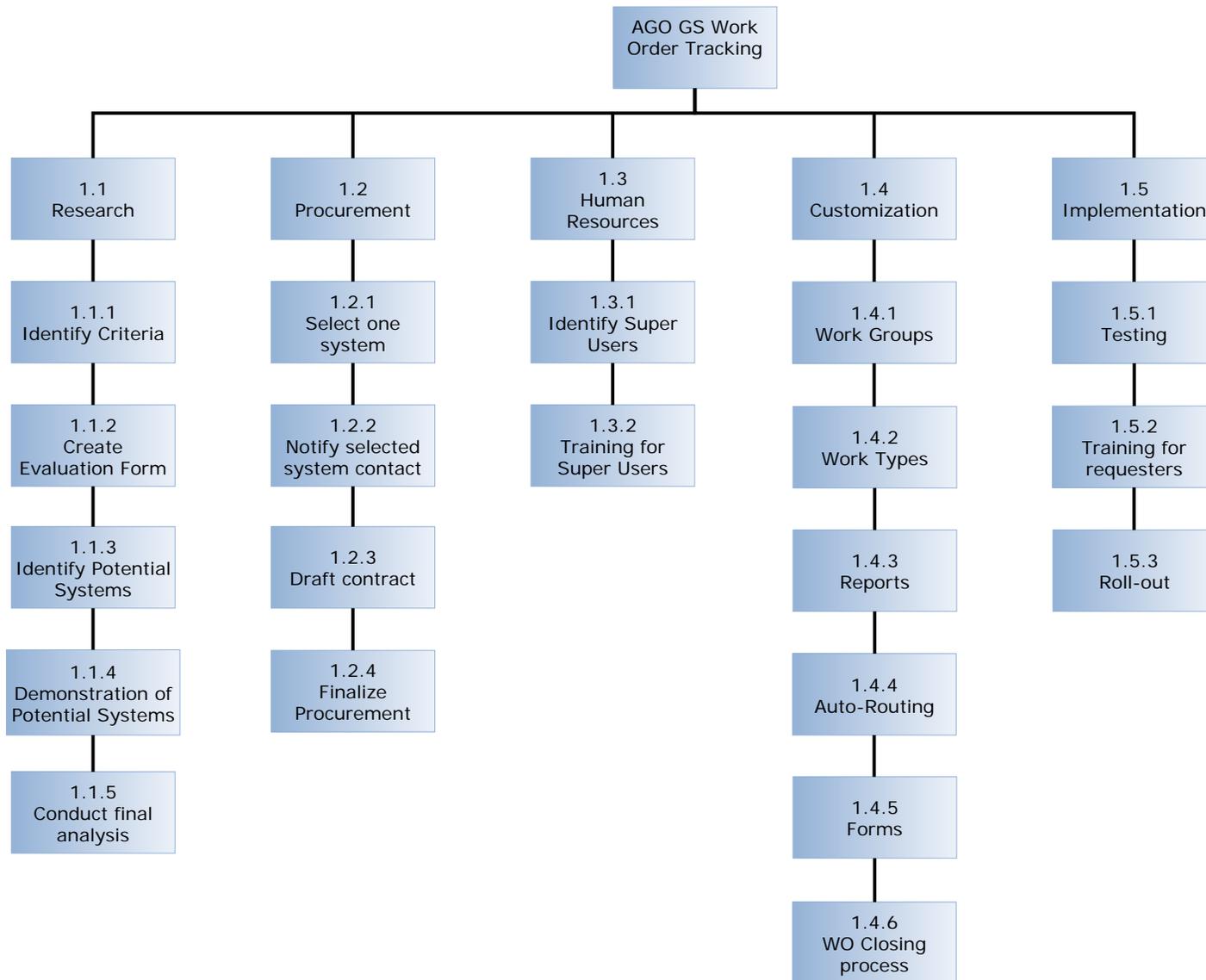
High () Medium () Low ()

Comments _____

Approved by _____

Project Manager _____

Date _____



Vendor	360Facilities	
Software	360Facilities	
	Question	Answer
1	Is the vendor a US-owned company?	Yes
2	Is the vendor an Ohio-based company?	No
3	Is the vendor the only source of the potential software?	Yes
4	Is the software on a State of Ohio State Term Schedule?	No
5	Is the vendor an MBE/EDGE?	No
6	Is there another State Agency using this software?	No
7	If yes, what does the State Agency say about the advantages/disadvantages?	
8	What is the fee break down, specifically:	Vendor will send attachment
a.	Purchase or Acquisition Cost	
b.	Training	
c.	Support	
d.	Maintenance / Updates	
e.	Licensing	
f.	Customization/Set-up	
g.	Hosting cost	
9	What sort of support do you provide?	Phone support and webex
10	Who will customize / upload data into the system?	AGO Staff
11	Will the system require coding for it to be customized?	No
12	Where will the system be "housed"?	At Vendor
13	Can multiple users access the system?	Yes
14	Is there a requester module?	Yes
15	Is there a cost for the requester module?	No, cost charge is only power users

16	Will the requester be able to view the work order?	Yes
17	Does the system notify users of completion of work order?	Yes (tech can use toggle to update user)
18	Does the system notify users of submission of work order?	Yes
19	What hardware is required to support the software?	Attachment
20	Will we have full access to the software code?	No
21	Does the software integrate with Active Directory?	No, but can implement daily spreadsheet update
22	What is the record retention policy?	System does not delete anything (50 GB of space)
23	Is there a reporting mechanism?	Yes, configurable pre-set reports and robust ad-hoc reporting
24	Is there auto-assignment mechanism?	Yes
25	Does it incorporate escalation rules?	Yes
26	Can we track costs of materials?	Yes, built into the system

Vendor	IssueTrak	
Software	IssueTrak	
	Question	Answer
1	Is the vendor a US-owned company?	Yes
2	Is the vendor an Ohio-based company?	No
3	Is the vendor the only source of the potential software?	Yes
4	Is the software on a State of Ohio State Term Schedule?	?
5	Is the vendor an MBE/EDGE?	No
6	Is there another State Agency using this software?	?
7	If yes, what does the State Agency say about the advantages/disadvantages?	?
8	What is the fee break down, specifically:	Attached in quote
a.	Purchase or Acquisition Cost	
b.	Training	
c.	Support	
d.	Maintenance	
e.	Licensing	
f.	Customization/Set-up	
g.	Hosting cost	
9	What sort of support do you provide?	Over the phone
10	Who will customize / upload data into the system?	AGO Staff
11	Will the system require coding for it to be customized?	No, Use the Administrator module / permission
12	Where will the system be "housed"?	IssueTrak (level 4) for a cost or AG
13	Can multiple users access the system?	Yes, unlimited users
14	Is there a requester module?	Yes, for end users
15	Is there a cost for the requester module?	No
16	Will the requester be able to view the work order?	Yes

17	Does the system notify users of completion of work order?	Yes
18	What hardware is required to support the software?	Attached document
19	Will we have full access to the software code?	Yes, full access
20	Does the software integrate with Active Directory?	Yes, there is a cost for the system
21	What is the record retention policy?	If, IssueTrak is hosting, they will not delete data
	updates/ changes	free with support
	confirmation of submission?	on the screen, and can
	see status	yes, through end user module
	are there reports	yes, dashboards (6) and out-of-box reports and report builder
	auto-assignment	yes, according to issue type, organization, department, location, priority, date, classes, subtypes (4)
	is there escalation rules?	yes, there is a built-in escalation process
	will it show material cost?	we can make it a user-defined field

Vendor	iOffice Corp	
Software	iOffice	
	Question	Answer
1	Is the vendor a US-owned company?	Yes
2	Is the vendor an Ohio-based company?	No
3	Is the vendor the only source of the potential software?	Yes
4	Is the software on a State of Ohio State Term Schedule?	No
5	Is the vendor an MBE/EDGE?	No
6	Is there another State Agency using this software?	No
7	If yes, what does the State Agency say about the advantages/disadvantages?	No
8	What is the fee break down, specifically:	?
a.	Purchase or Acquisition Cost	
b.	Training	
c.	Support	
d.	Maintenance / Updates	
e.	Licensing	
f.	Customization/Set-up	
g.	Hosting cost	
9	What sort of support do you provide?	Over the phone and webex
10	Who will customize / upload data into the system?	Provided a template so that staff can fill it out. iOffice will upload that template during implementation
11	Will the system require coding for it to be customized?	No, use the Admin tab (module)
12	Where will the system be "housed"?	Hosted at iOffice (Tier 4)
13	Can multiple users access the system?	Unlimited number of users can access
14	Is there a requester module?	Yes, there is a module or Kiosk with single sign-on
15	Is there a cost for the requester module?	no additional cost

16	Will the requester be able to view the work order?	Yes, the submitter can see status and all updates
17	Does the system notify users of completion of work order?	Yes, can email users
18	Does the system notify users of submission of work order?	Yes, emails users
19	What hardware is required to support the software?	Attachment
20	Will we have full access to the software code?	No
21	Does the software integrate with Active Directory?	Yes, for additional cost
22	What is the record retention policy?	No, they do not delete anything
23	Is there a reporting mechanism?	Yes, there are pre-set reports that can be filtered (but no dashboard at this time)
24	Is there auto-assignment mechanism?	Yes, can be set-up according to request type or location
25	Does it incorporate escalation rules?	There are response time-outs
26	Can we track costs of materials?	Yes, there are many options for tracking

Vendor	FM: Systems	
Software	FM: Systems	
	Question	Answer
1	Is the vendor a US-owned company?	Yes
2	Is the vendor an Ohio-based company?	No
3	Is the vendor the only source of the potential software?	Yes
4	Is the software on a State of Ohio State Term Schedule?	No
5	Is the vendor an MBE/EDGE?	No
6	Is there another State Agency using this software?	No
7	If yes, what does the State Agency say about the advantages/disadvantages?	
8	What is the fee break down, specifically:	Attachment
a.	Purchase or Acquisition Cost	
b.	Training	
c.	Support	
d.	Maintenance / Updates	
e.	Licensing	
f.	Customization/Set-up	
g.	Hosting cost	
9	What sort of support do you provide?	On-site for implementation, over-the-phone for support
10	Who will customize / upload data into the system?	AGO Staff
11	Will the system require coding for it to be customized?	No
12	Where will the system be "housed"?	Either at AGO or vendor (different pricing options)
13	Can multiple users access the system?	yes
14	Is there a requester module?	Yes
15	Is there a cost for the requester module?	No, cost charge is only power users
16	Will the requester be able to view the work order?	Yes

17	Does the system notify users of completion of work order?	Yes
18	Does the system notify users of submission of work order?	Yes
19	What hardware is required to support the software?	Attachment
20	Will we have full access to the software code?	No
21	Does the software integrate with Active Directory?	Yes, included in initial implementation
22	What is the record retention policy?	System does not delete anything (50 GB of space)
23	Is there a reporting mechanism?	Yes, configurable pre-set reports and robust ad-hoc reporting
24	Is there auto-assignment mechanism?	Yes
25	Does it incorporate escalation rules?	Yes
26	Can we track costs of materials?	Yes, built into the system

Vendor	360Facilities	
Software	360Facilities	
	Question	Answer
1	Is the vendor a US-owned company?	Yes
2	Is the vendor an Ohio-based company?	No
3	Is the vendor the only source of the potential software?	Yes
4	Is the software on a State of Ohio State Term Schedule?	No
5	Is the vendor an MBE/EDGE?	No
6	Is there another State Agency using this software?	No
7	If yes, what does the State Agency say about the advantages/disadvantages?	
8	What is the fee break down, specifically:	Vendor will send attachment
a.	Purchase or Acquisition Cost	
b.	Training	
c.	Support	
d.	Maintenance / Updates	
e.	Licensing	
f.	Customization/Set-up	
g.	Hosting cost	
9	What sort of support do you provide?	Phone support and webex
10	Who will customize / upload data into the system?	AGO Staff
11	Will the system require coding for it to be customized?	No
12	Where will the system be "housed"?	At Vendor
13	Can multiple users access the system?	Yes
14	Is there a requester module?	Yes
15	Is there a cost for the requester module?	No, cost charge is only power users
16	Will the requester be able to view the work order?	Yes

17	Does the system notify users of completion of work order?	Yes (tech can use toggle to update user)
18	Does the system notify users of submission of work order?	Yes
19	What hardware is required to support the software?	Attachment
20	Will we have full access to the software code?	No
21	Does the software integrate with Active Directory?	No, but can implement daily spreadsheet update
22	What is the record retention policy?	System does not delete anything (50 GB of space)
23	Is there a reporting mechanism?	Yes, configurable pre-set reports and robust ad-hoc reporting
24	Is there auto-assignment mechanism?	Yes
25	Does it incorporate escalation rules?	Yes
26	Can we track costs of materials?	Yes, built into the system

Vendor Selection Rating



Project Name
Project Number

Work Order Tracking System
AGO-129999

Proposed Firm
City, State Zip

iOffice
Houston, Texas 77019

Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	1
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 - 5	5
	Set-Up	0 - 10	7
	Maintenance	0 - 10	6
3. Support (9 points)			
	Phone	0 - 3	3
	In-Person	0 - 3	0
	Virtual	0 - 3	3
4. System Options (30 points)			
	a. Ability to Attach	0 - 5	5
	b. Customizable Fields	0 - 10	8
	c. Automatic Routing	0 - 5	5
	d. Active Directory	0 - 5	3
	e. User Notification	0 - 5	4
5. Customization (5 points)			
		0 - 5	5
6. Housed/Hosting (5 points)			
		0 - 5	5
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	5
	b. Ad Hoc	0 - 4	3
	c. Dashboard	0 - 4	4
		Total out of 90	72

Vendor Selection Rating



Project Name
Project Number

Work Order Tracking System
AGO-129999

Proposed Firm
City, State Zip

360Facility
Evanston, Illinois 60201

Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	2
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 – 5	3
	Set-Up	0 – 10	6
	Maintenance	0 – 10	10
3. Support (9 points)			
	Phone	0 – 3	3
	In-Person	0 – 3	0
	Virtual	0 – 3	3

4. System Options (30 points)			
	a. Ability to Attach	0 - 5	3
	b. Customizable Fields	0 - 10	5
	c. Automatic Routing	0 - 5	5
	d. Active Directory	0 - 5	0
	e. User Notification	0 - 5	5
5. Customization (5 points)			
		0 - 5	2
6. Housed/Hosting (5 points)			
		0 - 5	5
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	4
	b. Ad Hoc	0 - 4	4
	c. Dashboard	0 - 4	1
		Total out of 90	61

Vendor Selection Rating



Project Name
Project Number

Work Order Tracking System
AGO-129999

Proposed Firm
City, State Zip

IssueTrak
Virginia Beach, Virginia 23462

Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	1
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 – 5	3
	Set-Up	0 – 10	10
	Maintenance	0 – 10	3
3. Support (9 points)			
	Phone	0 – 3	3
	In-Person	0 – 3	0
	Virtual	0 – 3	0

4. System Options (30 points)			
	a. Ability to Attach	0 - 5	4
	b. Customizable Fields	0 - 10	7
	c. Automatic Routing	0 - 5	5
	d. Active Directory	0 - 5	4
	e. User Notification	0 - 5	4
5. Customization (5 points)			
		0 - 5	4
6. Housed/Hosting (5 points)			
		0 - 5	5
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	5
	b. Ad Hoc	0 - 4	3
	c. Dashboard	0 - 4	3
		Total out of 90	64

Vendor Selection Rating



Project Name
Project Number

Work Order Tracking System
AGO-129999

Proposed Firm
City, State Zip

IssueTrak
Raleigh, NC 27609

Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	2
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 – 5	4
	Set-Up	0 – 10	2
	Maintenance	0 – 10	2
3. Support (9 points)			
	Phone	0 – 3	3
	In-Person	0 – 3	1
	Virtual	0 – 3	3

4. System Options (30 points)			
	a. Ability to Attach	0 - 5	0
	b. Customizable Fields	0 - 10	9
	c. Automatic Routing	0 - 5	5
	d. Active Directory	0 - 5	5
	e. User Notification	0 - 5	4
5. Customization (5 points)			
		0 - 5	5
6. Housed/Hosting (5 points)			
		0 - 5	5
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	5
	b. Ad Hoc	0 - 4	5
	c. Dashboard	0 - 4	4
		Total out of 90	62

Selection Criteria		Value	iOffice	360Facility	IssueTrak	FM Systems
1. Firm Location (3 points)						
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	1	2	1	2
	251 to 500 miles (in US)	2				
	In continental United States	1				
2. Cost (25 points)						
	Training	0 – 5	5	3	3	4
	Set-Up	0 – 10	7	6	10	1
	Maintenance	0 – 10	6	10	3	2
3. Support (9 points)						
	Phone	0 – 3	3	3	3	3
	In-Person	0 – 3	0	0	0	1
	Virtual	0 – 3	3	3	0	3
4. System Options (30 points)						
	a. Ability to Attach	0 - 5	5	3	4	0
	b. Customizable Fields	0 - 10	8	5	7	9
	c. Automatic Routing	0 - 5	5	5	5	5
	d. Active Directory	0 - 5	3	0	4	5
	e. User Notification	0 - 5	4	5	4	4
5. Customization (5 points)						
		0 - 5	5	2	4	5

6. Housed/Hosting (5 points)						
		0 - 5	5	5	5	5
7. Reporting (13 points)						
	a. Pre-Set	0 - 5	5	4	5	5
	b. Ad Hoc	0 - 4	3	4	3	5
	c. Dashboard	0 - 4	4	1	3	4
		Total out of 90	72	61	64	63

Vendor Selection Rating

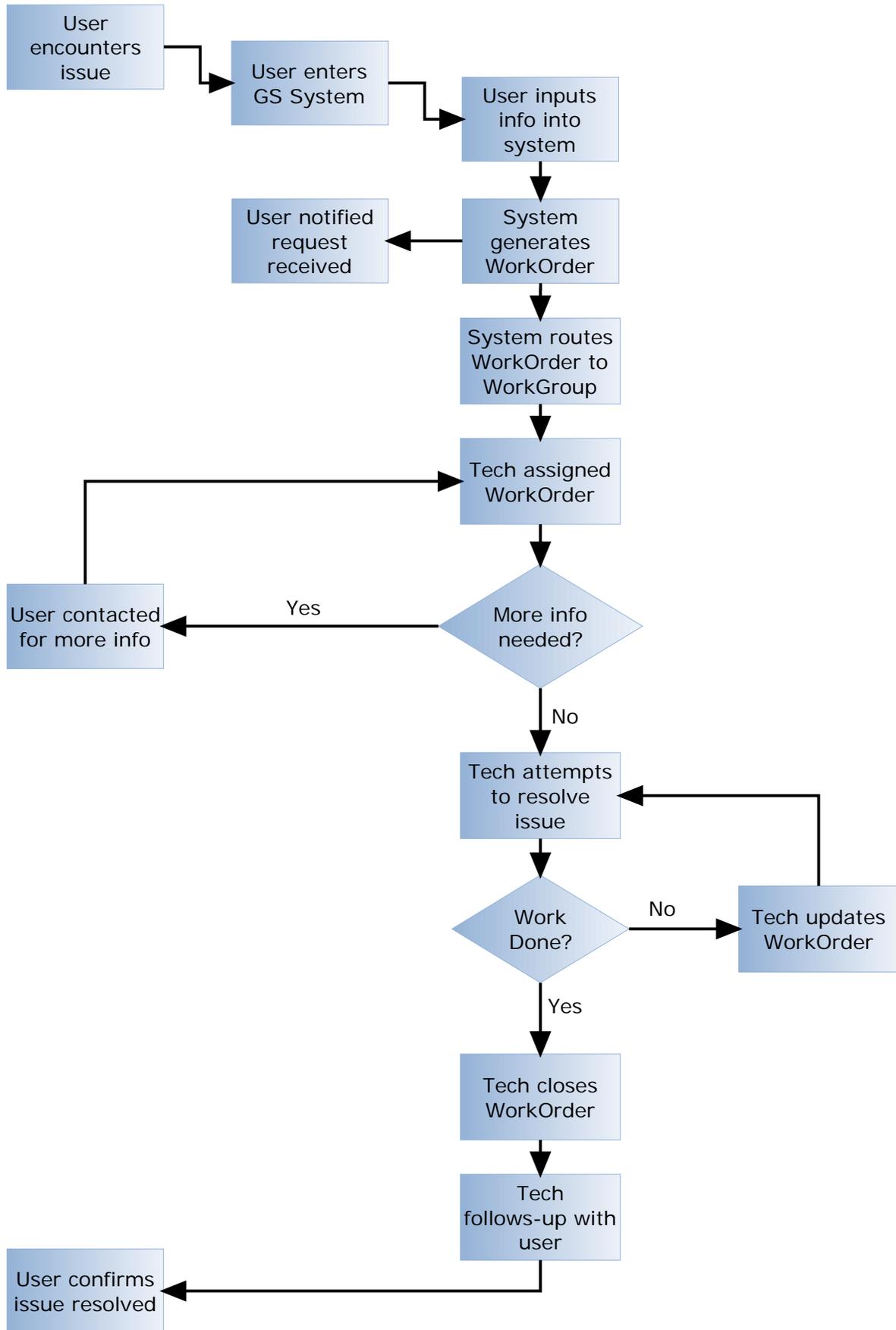


Project Name
Project Number

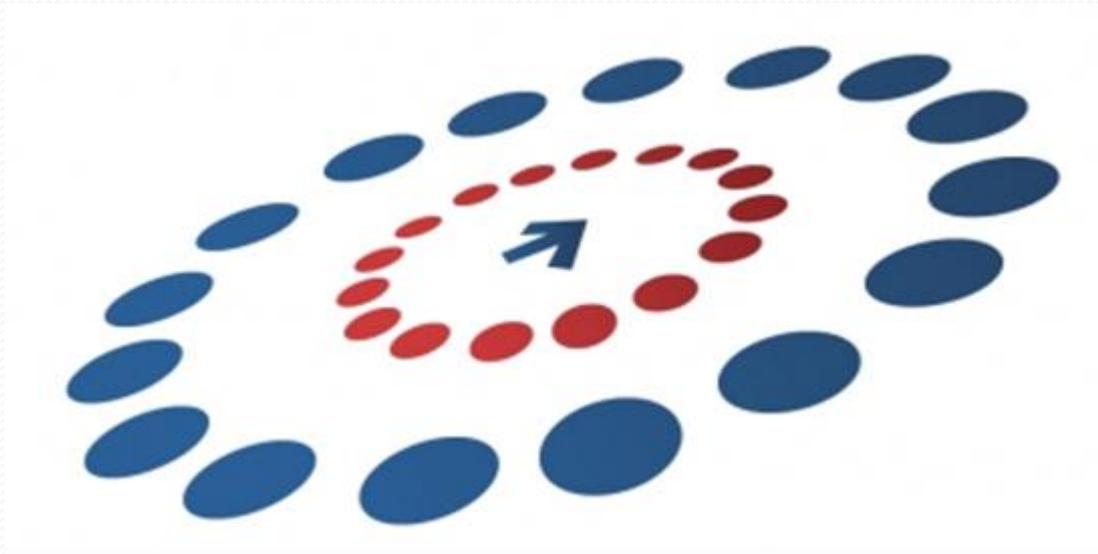
Proposed Firm
City, State Zip

Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 – 5	
	Set-Up	0 – 10	
	Maintenance	0 – 10	
3. Support (9 points)			
	Phone	0 – 3	
	In-Person	0 – 3	
	Virtual	0 – 3	

4. System Options (30 points)			
	a. Ability to Attach	0 - 5	
	b. Customizable Fields	0 - 10	
	c. Automatic Routing	0 - 5	
	d. Active Directory	0 - 5	
	e. User Notification	0 - 5	
5. Customization (5 points)			
		0 - 5	
6. Housed/Hosting (5 points)			
		0 - 5	
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	
	b. Ad Hoc	0 - 4	
	c. Dashboard	0 - 4	
		Total out of 90	0



Work Order Tracking



Centralizers

Introduction

Barbara Taylor: Administrative Services

Dave Howe: Attorney General's Office

Shavkat Nasirov: Attorney General's Office

Laverne Gordon: Industrial Commission

Dennis Morgan: Rehabilitation and Correction

Charter

PROJECT TITLE:

General Services Work Order Request System

DESCRIPTION:

The Department of Administrative Services has a need for research, development of framework, and presentation of recommended solution for a Work Order tracking system for the General Services section of the Ohio Attorney General's Office.

The General Service section has a need for an efficient Work Order request tracking and reporting system. The current system has proven to be inefficient by requiring duplication of work, manual entry of the work request into spreadsheets, tracking work via email, and relying on reports that are derived from the spreadsheets.

BUSINESS CASE:

The General Services section has a need for an efficient work order request tracking and reporting system. The current system has proven to be inefficient by requiring duplication of work, manual entry of work request in spreadsheets, tracking work via email, and relying on reports that are derived from the spread sheet.

Scope

PRODUCT DESCRIPTION / DELIVERABLES:

The project team will be responsible for the delivery of:

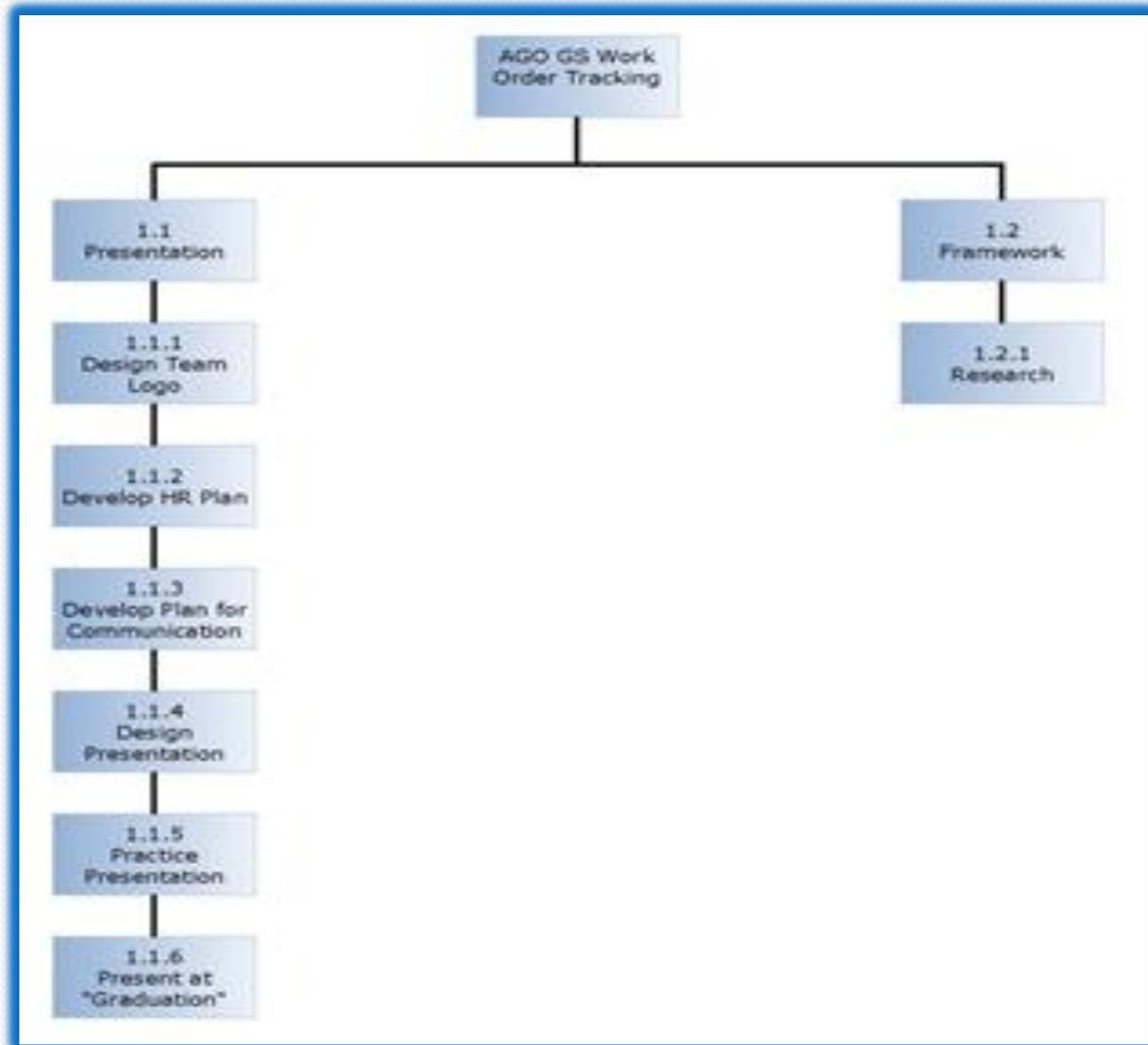
- PowerPoint Presentation
 - Charter
 - Scope
 - Work Breakdown Structure
 - Schedule
 - Risk Management Plan
 - HR Plan
 - Communications Plan
 - Cost Management Plan
 - Quality Management Plan

SCOPE EXCLUSIONS:

The project will not create any other Project Plan document for the framework

The project will not be responsible for the building and developing the recommend system.

WBS



Schedule

- Work Order Tracking Project – 37 Days
 - Analysis Phase – 5 Days; 4/3/12 to 4/9/12
 - Planning Phase – 11 Days; 4/10/12 to 4/24/12
 - Research Phase – 16 Days; 4/10/12 to 5/1/12
 - Product Deliverables – 11 Days; 5/1/12 to 5/15/12
 - Presentation – 11 Days; 5/1/12 to 5/15/12
 - Closing Phase – 7 Days; 5/15/12 to 5/23/12

Quality Assurance and Control

- Quality Assurance
 - Correct spelling, grammar, and punctuation
 - Uniform specifications and questions for evaluation of Vendors
- Quality Control
 - Group consensus on documentation
 - Standardized questions and evaluation form

Probability and Impact Matrix

Risk	Potential of impact	Risk Owner	Probability of Occurrence (1-3)	Impact of Risk (1-3)	Risk Level (1-9)	Response Type	Risk Response Plan
Team members fail to meet	Cause delays to project development	PM/instructor	1	1	1	accept	Work around missing members
Team members fail to come to consensus	Cause delays to project development	PM	2	2	4	transfer	Identify and assign facilitator to move beyond impasse
Team members fail to deliver assigned work	Cause presentation failure	PM/instructor	2	3	6	accept	Reassign work to other team members
Team fails to deliver presentation on time (7weeks)	Cause presentation failure	PM/instructor	2	3	6	Accept	Weekly progress check in to determine status of class and assign work to one or more members to prevent loss of productivity

Probability	Criteria
High(3)	It is almost certain or very likely that the risk will occur.
Medium (2)	It is somewhat probable that the risk will occur
Low (1)	It is unlikely or improbable that the risk will occur

Cost Management Plan

Cost Management Plan				
<u>Team Member</u>	<u>Time (Wks)</u>	<u>Hours</u>	<u>Blended Rate</u>	<u>Cost</u>
Laverne Gordan	7	6.5	\$ 40.00	\$ 1,820.00
Dave Howe	7	6.5	\$ 40.00	\$ 1,820.00
Dennis Morgan	7	6.5	\$ 40.00	\$ 1,820.00
Shavkat Nasirov	7	6.5	\$ 40.00	\$ 1,820.00
Barbara Taylor	7	6.5	\$ 40.00	\$ 1,820.00
Total Estimated Cost				\$ 9,100.00
<u>Team Member</u>	<u>Time (Wks)</u>	<u>Hours</u>	<u>Blended Rate</u>	<u>Cost</u>
Laverne Gordan	7	8	\$ 40.00	\$ 2,240.00
Dave Howe	7	8	\$ 40.00	\$ 2,240.00
Dennis Morgan	7	8	\$ 40.00	\$ 2,240.00
Shavkat Nasirov	7	8	\$ 40.00	\$ 2,240.00
Barbara Taylor	7	8	\$ 40.00	\$ 2,240.00
Total Actual Cost				\$ 11,200.00

Human Resources Plan

- Roles and Responsibility
- Project Organization
- Staff Management

Communications Plan

What	Who/Target	Purpose	When/ Frequency	Type/Method
Meeting Agenda	PM TEAM MEMBERS	Set Agenda for weekly team meetings	Weekly distribution	Distribute electronically and stored in a central repository.
Meeting minutes/summary	PM TEAM MEMBERS	Update progress of the project and items covered during weekly team meetings	Weekly distribution	Distribute electronically and stored in central repository
Weekly Team Meeting	PM TEAM MEMBERS	To review detailed plans (tasks, assignments, issues, and action items).	Tuesdays for duration of the project	Face to face meetings with project team members
PROJECT TEAM SITE	STAKEHOLDERS	Serve as central repository for technical and project documents. Display project status, team contacts, and other pertinent information.	Ongoing	<i>To be stored in a central repository (SharePoint).</i>
POST PROJECT REVIEW/LESSONS LEARNED.	Project Manager, *key stake holders an *sponsor(s)	Identify improvement plan, lessons learned, what worked and what could have gone better. Review accomplishments	End of the Project	Stored in a central repository.

Lessons Learned



LESSONS LEARNED LOG TEMPLATE

Project Name: work order tracking System
Project Manager: Barbara Taylor
Project Sponsor: Attorney General - General Services

Significant Project Successes

#	Date Created	Created By	Lesson Description	Priority	Comments
1	4/10/2012	Barbara Taylor	Meeting Agendas	Medium	Kept team on track and focused
2	4/3/2012	Team	Communication	High	Essential to project success
3	04/03/12	Team	Meetings w/ Stakeholders	High	Clear Goals and restrictions
4	04/03/12	Team	Team Member Attendance	High	A must with a team spread out across the state

Significant Project Shortcomings

#	Date Created	Created By	Lesson Description	Negative Impact	Resolution	Comments
1		Doing project for class	Confusion	Time Watsed	Nelson	Team should have clarified w/ Nelson sooner
2		Assuming	Communication of needs to Vendors	Time Wasted	Organization	Should have started from scratch
3		Inexperience	Vetted Vendor Questionnaire	Time Watsed	Reseach and Organization	Should have contacted SME for advise
4		Inherent problems	Project Sharepoint	Confusion	Deal with it	Figured out how to deal w/ it in last week

Business Case

The General Services section has a need for an efficient work order request tracking and reporting system. The current system has proven to be inefficient by requiring duplication of work, manual entry of work request in spreadsheets, tracking work via email, and relying on reports that are derived from the spread sheets.

Description of Product

This project will generate a framework which the General Services staff can use for the planning and implementation of the Work Order tracking system.

Framework:

- Present the Project Management documents
- Outline General Services Section's requirements
- Recap the various systems the project team reviewed
- Provide a comparison of the systems
- Present the recommended system

Product Charter

General Services Work Order Request System

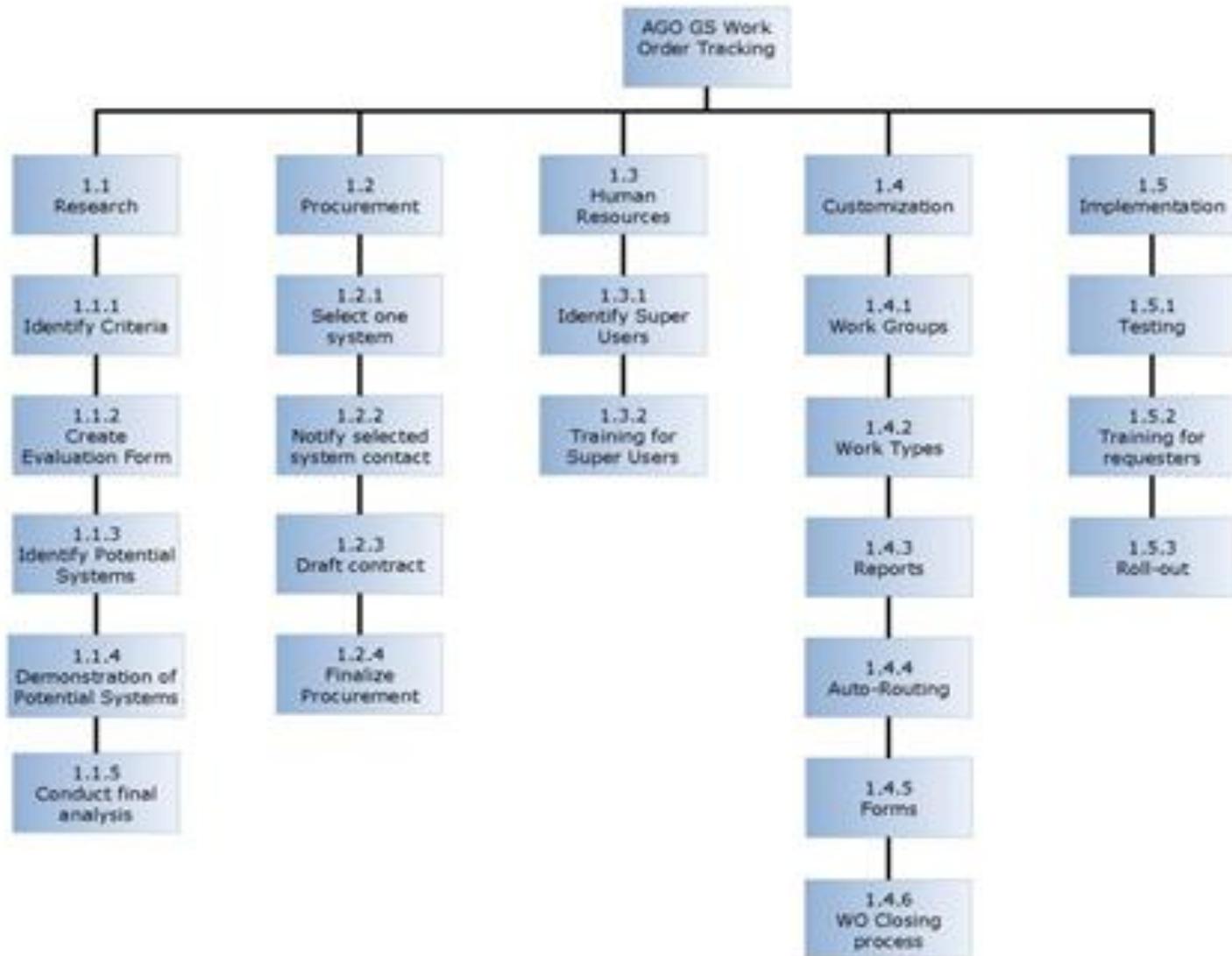
- Currently keeps track of all work requests by using the email system
- Need Centralized system that routes work orders to technicians and provides reports to management.
- Acceptance Criteria
- Deliverables
- Cost Analysis
- Risk
- Sign-off By Sponsor

Product Scope



- Project Justification
- Project Product
- Project Deliverables
- Project Objectives
- Identified Risks
- Assumptions/Constraints
- Project Requirements
- Scope Exclusions
- Budget

Product WBS



System Comparison

	Access DB	Help Desk Software	Form Input Software
Ease of Access for End Users	Medium	Low	High
Customization	High	Medium	Medium
Development Time	High	Low	Low
Help Desk Need	Medium	High	Low
IT Support Need	High	Low	Low

	Meets Specifications and Requirements
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Evaluation Form (Part 1)

Vendor Selection Rating			
Project Name		Proposed Firm	
Project Number		City, State Zip	
			
Selection Criteria		Value	Score
1. Firm Location (3 points)			
Proximity of primary firm office where majority of work is to be performed in relationship to project site (AGO's Office)	Less than 250 miles (in US)	3	
	251 to 500 miles (in US)	2	
	In continental United States	1	
2. Cost (25 points)			
	Training	0 – 5	
	Set-Up	0 – 10	
	Maintenance	0 – 10	
3. Support (9 points)			
	Phone	0 – 3	
	In-Person	0 – 3	
	Virtual	0 – 3	

Evaluation Form (Part 2)

4. System Options (30 points)			
	a. Ability to Attach	0 - 5	
	b. Customizable Fields	0 - 10	
	c. Automatic Routing	0 - 5	
	d. Active Directory	0 - 5	
	e. User Notification	0 - 5	
5. Customization (5 points)			
		0 - 5	
6. Housed/Hosting (5 points)			
		0 - 5	
7. Reporting (13 points)			
	a. Pre-Set	0 - 5	
	b. Ad Hoc	0 - 4	
	c. Dashboard	0 - 4	
		Total out of 90	0

Comparison

- **Scores:**

- **iOffice** 72
- **IssueTrak** 64
- **FM Systems** 63
- **360Facility** 61

Recommendation

- **iOffice**
- Justification
 - End User can check status and enter Work Orders
 - Best system for the value
 - User-friendly interface
 - Good reports
 - Copy module
 - US based support

Q & A

