# **MDOT - OTTS Project Intake Form Date: 12/4/2019**

*A project is a temporary endeavor undertaken to create a unique product, service or result. It has a defined beginning and end, as well as a defined scope. The project intake process is the process established to review and approve funding and resourcing of projects and includes completing a project intake form and attending a project intake meeting. All information and questions are welcome. It is understood that the information provided is what is known at the time of submission and serves as a basis for discussion to assess the project request. The PMO Manager, along with the deputy CIO, will collaboratively review the form and request a meeting with the business stakeholders. Upon approval, the status of the proposed project will change to “initiation”, a project manager will be assigned, and a project charter will be developed.*

1. **Project Request Date: 11/20/2019**
2. **Project Name: The Real Estate Fillable Forms Phase II**
3. **Project Contacts:**

|  |  |  |
| --- | --- | --- |
|  | **Name** | **Key contact for this proposal? (Yes/No)** |
| **Business Owner(s)** | John Wafer  Glen Carter | Yes |
| **Project Sponsor(s)** | Nimisha Sharma | Yes |

1. **Is the project p*art of a program*?**

YES  NO

**If YES, please specify the name of the program.**

Real Estate Fillable Forms

1. **Project Description** –

Continuation of Phase I Fillable Forms project, which was to develop the Real Estate Document Completion system for property clearance across MDOT. Phase II will focus on mapping data in the database to Sales Documents, Closing Documents, Approval Documents, Deeds and Recordation documents; developing new tables, new splash screens and modifying input screens. New functions such as selecting CC and BCC from a table are to be considered enhancements.

1. **Current *workaround(s)* in place** –

Currently, this is a manual effort. A template is used which includes required fields indicated in red that has to be completed with redundant data.

1. **Expected *benefits* of completing the project** –

Saving Time, Increased Accuracy, Increased staff efficiency in relation to number of files handled.

1. **Is there another business unit(s) or system(s) that would be impacted by this project (i.e. has a dependence, integration, interface, process change)? If so what is the business unit or system(s)? How are they impacted?**

The current ACCESS database system is for TSO ORED only. The system will grow to an enterprise wide system when the redesign of the Office of Real Estate Management System (OREMS) is completed by SHA OIT. SHA OIT has not determined which platform will be used for the Enterprise wide solution. It could be Oracle, SQL, Salesforce or other. The forms system being developed in ACCESS will be the foundation for the workflow migration to OREMS. The six TBUs will have access to the enterprise system via the internet or cloud. Each TBU will only have access to their data. TSO will have access to ALL TBU data.

1. **Other project dependencies?** – The Access database connects to a SQL Server back-end.
2. **Mandatory Project?  YES  NO**

**If “YES”, please select reason:**

|  |
| --- |
| **Mandatory (Directive/Compliance-Related/Funding-Related including Audit, Regulatory, Legislated Change, Policy and “Use it or Lose it” Funding)** |
| **Mandatory (Software Compliance for continuing vendor support)** |

**Comments:** The output of data to auto-fill documents generated by the system is mandatory.

## Department Priority *<Please indicate by Importance and Urgency rating the Priority of this project for your department and provide comments, as appropriate.>*

## Importance of project to department:

## High Medium Low

**Comments:**

## Urgency of project to department

## High Medium Low

**Comments:**

1. **Requested Project Start and Completion/Delivery Timeline**

**Requested Start Date (if any):** As soon as possible

**Requested End Date (if any):** Prior to 3/1/2020. The Project team will provide an accurate date based on the finalized requirements.

**Reason for Requested Date(s):** The product needs to be deployed and usable prior to the busy March period. The product will potentially be released incrementally starting with settlement and sales.

1. **Is there funding for this project? If so, how much are from what source?**

YESNO

1. **Is there anything involved in delivering this project that may not have been *budgeted*?**

**YES  NO**

**If Yes, please comment.**

1. **Business Admin Support** – John Wafer in Real Estate
2. **Is procurement of an IT solution and/or consulting services part of the project?**

YESNO

1. **Will the solution require services from MDOT-TSO Application Support Team?** *(system administration, database, user security, cloud support, etc.)*

YESNO

1. **Strategic Alignment** *<Indicate how this initiative aligns to components of the current MDOT, departmental and/or IT Strategic Plan(s).>*

N/A. This is a continued effort from Phase I of the project and OTTS is committed to working on the project.

1. **MDOT Strategic Plan**

|  |
| --- |
| **As mentioned in Item 8, above, the ultimate goal is for an enterprise wide database of real property assets that will track assets and their use, produce documents and reports, streamline the clearance process and improve accuracy. while providing a friendly user interface.** |

**B. Department Strategic Plan**

1. **Please list any supporting document (links or attachments) for this proposal.**

Requirements documents

Form Templates

Input screen concepts

Splash Screen concepts

**Approved By:**

**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Project Sponsor Date:**

***Thank you for competing the Project Intake form.***

## Next Steps in the Project Intake Process

*Service Commitment and Project Intake Meeting:* The PMO Manager will make contact within three (3) business days with the Key Contact, as identified above to schedule a Project Intake Meeting for discussing the proposed project, using the information provided, and deciding how to proceed.

*After the Project Intake Meeting:* The Project Intake Process form will be updated and distributed, by the PMO Manager, to communicate the decision about how to proceed with proposed project as well as the suggested project management approach (as appropriate).

=====================================================================================

**Below to be Filled out by IT**

1. **Strategic Alignment IT Strategic Plan?**
2. **Anticipated Technology Involvement (check all that apply)**

## Application(s)

\_\_ New \_\_Enhancement \_\_Replacement

## Service(s)

\_\_ New \_\_Enhancement \_\_Replacement

## Hardware or Other Equipment

\_\_ New \_\_Enhancement \_\_Replacement

## Other

## Enterprise Architecture

Enterprise Architecture (EA) is the overall representation of the organization’s business and information technology. EA plays a key role in formulating strategic plans and offers architectural principles, standards and policies to guide the procurement, development and deployment of an integrated technology to meet the business needs within an enterprise.

### This project involves technology changes that do not fit with currently supported Enterprise Architecture and requires an exception: *<Indicate and describe below>*

Yes

No

Unknown

1. **Deliverables**

Deliverables are often considered to be the tangible goods and services provided to internal or external project “customers” once the project has been completed. Examples of deliverables can be training documentation, a new software application, a server hardware upgrade, and improved course registration services.

*< Identify the deliverables and any time sensitivities for this project>*

|  |  |
| --- | --- |
| **Deliverable Name** | **Proposed Completion Date** |
|  |  |
|  |  |

1. **Scope**

When we think about planning for the project, we need to think about what activities and deliverables (see definition above) are within the project’s boundaries or mandate and which activities and deliverables are outside (not on the project’s “To Do” list).

## In-Scope: *<List activities that are In-Scope for this request e.g. procurement of solution and/or resources>*

### **Out-of-Scope:** *< List activities that are Out-of-Scope for this request e.g. integration>*

## Project Complexity (To be determined during intake meeting.)

|  |  |
| --- | --- |
| **Project Class** | **Project Management Approach** |
| Small | Light Project Coordination |
| Medium | Moderate Project Management |
| Large | Substantial Project Management by a Skilled Project Manager |