



ORANGE COUNTY ASSESSOR DEPARTMENT

ATS Re-Engineering

Board of Supervisors Update #7

February 2, 2010

Status as of December, 2009

ATS Re-Engineering Updates

**A brief Project Summary
updating Accomplishments,
Schedule and Costs to the last
status report dated October 6,
2009**

ATS Project Overview and Update

- **Unsecured Property Systems**

Released July 6, 2009

This part of the system is active in the near-production environment for user review and system testing. Enhancements to the system are being coordinated with the Secured subsystem releases.

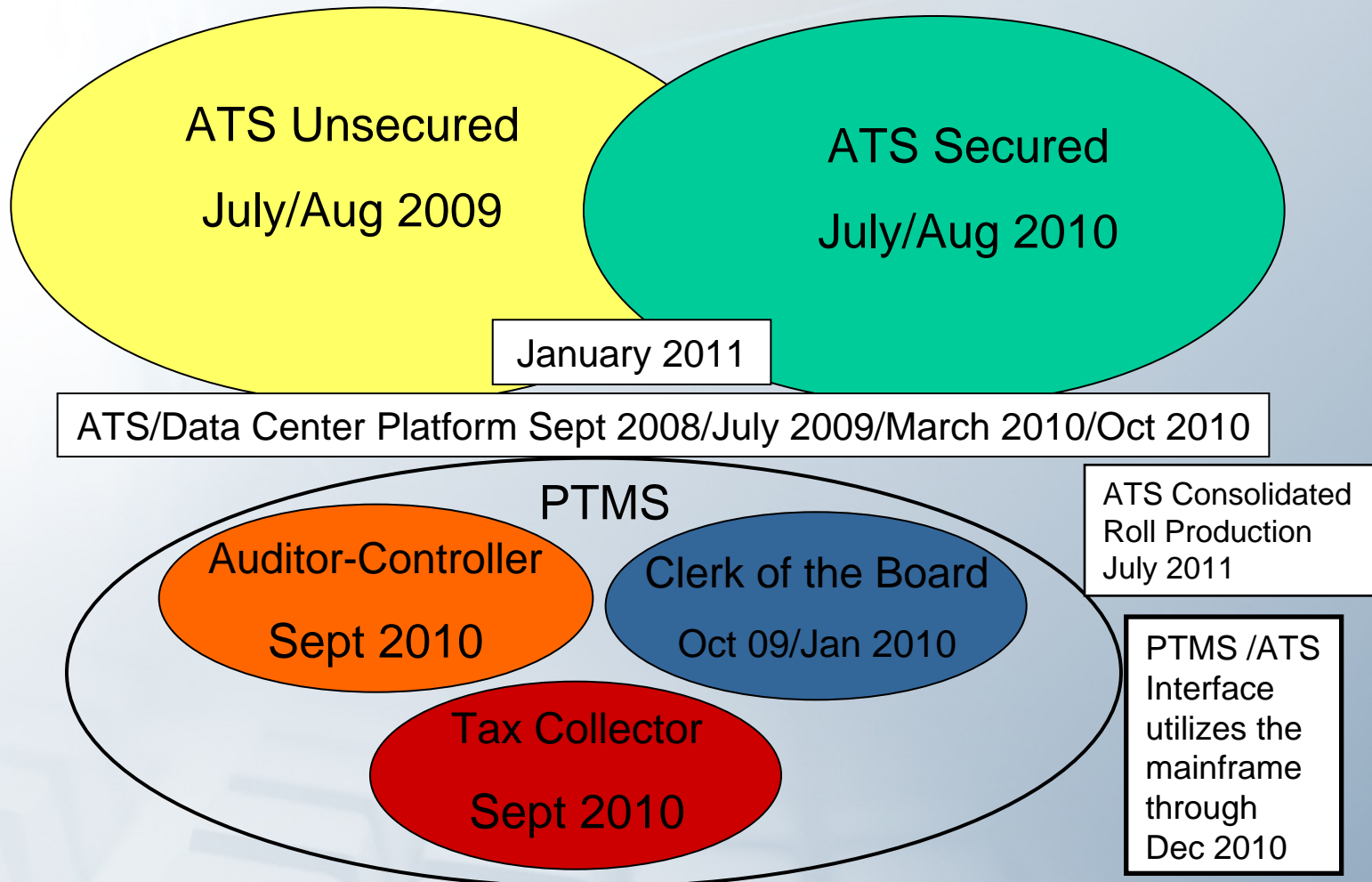
- **Secured Property Systems**

Release Planned for July 2010

There have been three (3) releases of subsystems to users for testing through Jan 2011. The Secured Systems development is moving ahead on schedule for a July/August 2010 deployment to near production.



ATS Deployment and PTMS Interface Planning Overview



*All dates are estimates based on planning updated as of September 2009 and include progress updates through Dec 2009. Dates can and will adjust to accommodate annual and supplemental roll schedules, Assessor workloads and support resource availability between now and January 2011.

ATS Re-Engineering Risk Mitigation

Top 4 Risks to the Project

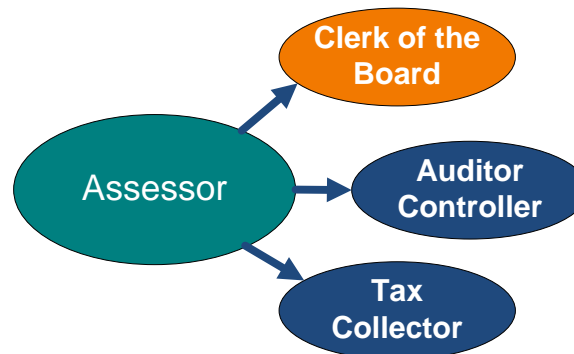
- **Knowledge Base & Availability of Resources**
 - Shortage of code mining resources due to ongoing roll production workload and new medical/family leaves; some schedule impact is expected, upsetting the schedule has a cost impact.
 - Retirement of long-term key staff
 - Availability of User and Support resources (FY 2009-10 budget reductions)
- **Impact on the Work Needed to Accommodate a “Negative CPI” for Valuation and Roll Production**
 - Negative CPI will need to be addressed in both the current Mainframe ATS and the new ATS.
- **Resource required for “Negative CPI” work will impact the ATS and PTMS projects. Some of the same key programmers are required on both systems to maintain schedules, and upsetting the schedule has a cost impact.**
 - Scope of this item and potential impacts are being defined and there are some delays due to missing people resources.

ATS Re-Engineering Risk Mitigation

Top 4 Risks to the Project (cont'd)

- **PTMS software development and interface schedule (interface approach developed, architectural definition ongoing)**
- **Clerk of the Board Interface (planned Nov 2009) is late. The new estimate is April 2010 (tbd) and that has a schedule and cost impact on the ATS delivery.**
 - Auditor-Controller Interface (estimated Sept 2010)
 - Tax Collector Interface (estimated Sept 2010)

PTMS Interface Hardware and Network Architecture



ATS Re-Engineering Risk Mitigation

Top 4 Risks to the Project (cont'd)

- **New Production Environment at the Data Center**
 - **Testing (ongoing and continuing through Nov 2010)**
 - **Data Center Open Systems Operations and Maintenance Environment, near production milestones for July/August 2009 are in place and next we are looking for the system needs for Nov/Dec 2010 and through July 2011. The necessary policy/procedures development reviews and discussions with CEO/IT are underway.**
 - **The CEO/IT has cautioned that the lead time to add or change out hardware for all vendors has increased to 90 to 120 days.**

Accomplishments (As of Dec '09)

ATS – PTMS Interface

- The PTMS development team requested an extract of roll data from the year 2000 through the current Roll to support Tier I testing. The Assessor provided a listing of the Roll data that could be retrieved from the Data Center archives.
- On November 13, 2009 the Assessor provided the Clerk of the Board with a matrix of data elements that are exchanged between ATS and PTMS Departments for review and comment. The COB comments were received by the Assessor on December 10th.
- The Data Elements Matrix will be used as the basis for revising MOUs between the departments. The Assessor is defining a method of sharing restricted and confidential property owner information with PTMS without breaking the proposed interface security model. – *January 29, 2010*
- The Assessor developed, along with CEO/IT, a preliminary ATS and PTMS interface and network architecture and shared this overview in Aug 2009, awaiting feedback.
- The ATS team and PTMS team have met 10 times through November and December to discuss such items as Network Architecture, Data Interface for Appeals, and the Interface for Roll Data.
- The ATS team is preparing a Design Review for the ATS – PTMS Interface. The design review will include the manner of sharing confidential data on separate platforms – *January 29, 2010*
- The Assessor approved on December 18, 2009 the use of the Hostbridge software for ATS screen scraping to assist the PTMS team.
- The Assessor and Auditor-Controller met on January 25th to discuss the new PTMS schedule and interface for data sharing.

Accomplishments (As of Dec '09)

Secured and Unsecured Sub-System Development

- Four major Secured Sub-System releases are scheduled throughout 2009/10 and deployment to near production will be in July/August 2010
- The third release of the Secured Sub-System was installed on 112 desktops on December 29, 2009 for user review and testing. The release included:

Added to New Construction: Tracts (Plans & Options, Lots/Parcels/Imps/NCS Events, Projects/Products/Lots, Valuation)

Re-factoring and Enhancements to Mapping:

Re-factoring and Enhancements to Transfer also Added: Create Transfer Event, Transfer Valuation, Time Share Assessment and Valuation

Re-factoring and Enhancements to Address Control also Added: NAD Workflow

Added Search: Events, Additional Secured Searches

- The third release of the Secured Sub-System was delayed by 7 days due to the availability of key Department resources and Subject Matter Experts. Ref: Top 4 Risks slide.
- Through December 2009 the Department has conducted 35 user training sessions and 24 user hands-on workshops for the new ATS Secured Mapping and Ownership modules
- The ATS systems both Secured and Unsecured are on schedule and tracking 4 to 6 weeks off schedule for some testing and reviews due to people resources, no software development problems.

ATS Re-Engineering Schedule As of December 31, 2009

Color Key: ■ On Schedule ■ Late ■ Impact

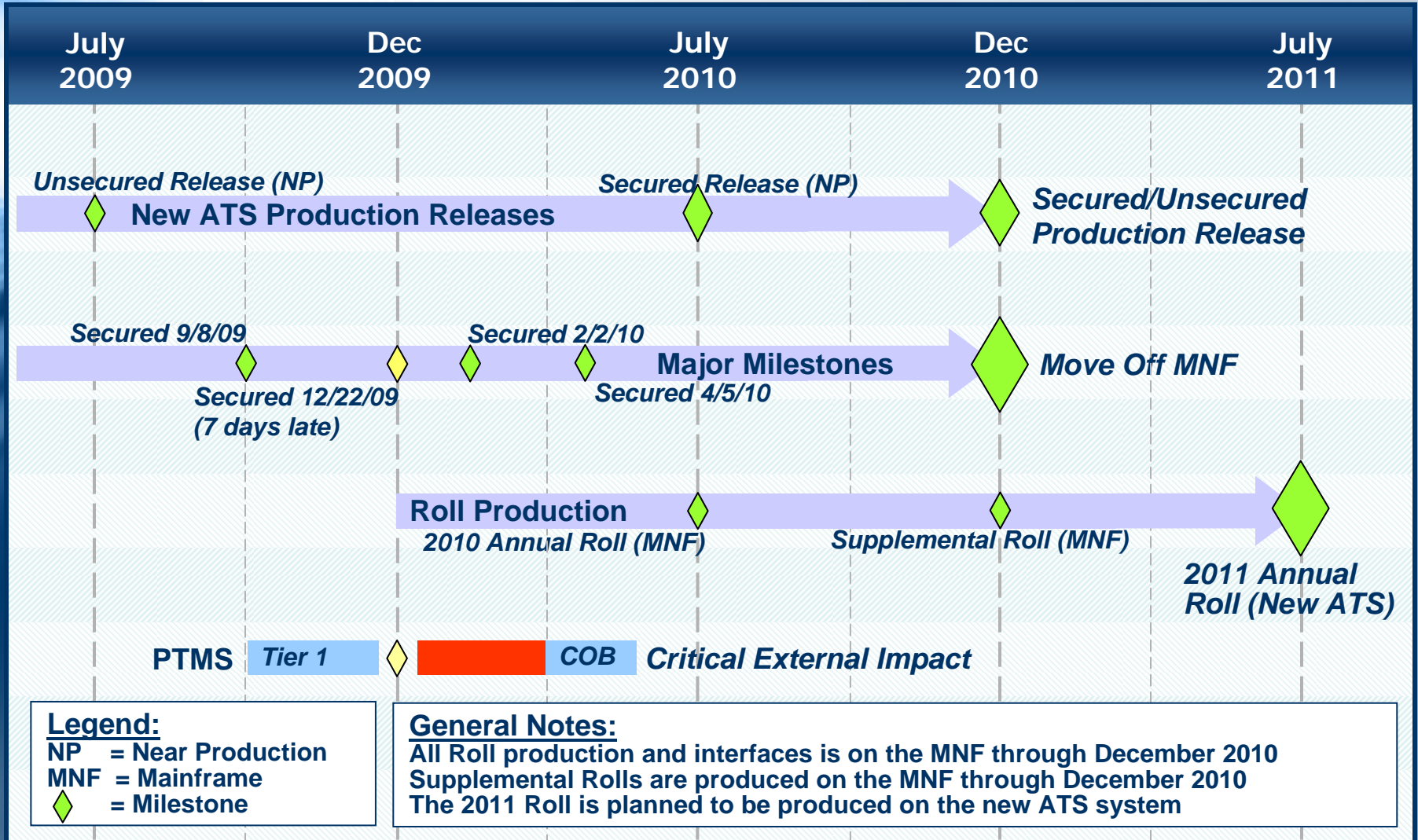
The table below shows some of the key checklist considerations for ATS migration to the new platform. The items are selected from the ATS Re-Engineering project checklists and categorized as **Database Migration**, **Software Migration** (*System Functionality*), **Infrastructure and Operations** (*Hardware, Network and Procedures*).

Database Migration	Software Migration	Infrastructure and Operations
07/24/09 - Develop Conversion Schedule for Secured Database	08/16/09 - Major ATS Release of Secured Modules for Testing and Unsecured Enhancements	10/19/09 - Configure Application Servers to 32bit for Job Scheduling with CEO-IT
08/03/09 - Update and Test Conversion Scripts to include Secured Data	09/08/09 - Interim Release to Update Secured User Testing	11/02/09 - Define Comparable Sales Interface Requirements
08/09/09 - Convert Database for ATS Major Release (scheduled 08/16/09)	09/29/09 - Major ATS Release of Secured Modules for Testing and Unsecured Enhancements	11/02/09 - Define Geo-Spatial Interface Requirements
09/13/09 - Convert Database for ATS Major Release (scheduled 09/29/09)	10/20/09 - Interim Release to Update Secured User Testing	12/01/09 - Application Stress Testing to Establish System Performance Baseline
10/25/09 - Convert Database for ATS Major Release (scheduled 11/10/09)	11/10/09 - Major ATS Release of Secured Modules for Testing and Unsecured Enhancements	12/01/09 - Test Control-M Job Scheduling Software with CEO-IT
12/06/09 - Convert Database for ATS Major Release (scheduled 12/22/09)	12/01/09 - Interim Release to Update Secured User Testing	TBD - Test ATS - PTMS Interface Architecture with CEO-IT
TBD - Incorporate Data Elements to Support PTMS Interface	12/22/09 - Major ATS Release of Secured Modules for Testing and Unsecured Enhancements	TBD - Application Stress Testing to Establish System Performance Baseline with CEO-IT
01/17/10 - Convert Database for ATS Major Release (scheduled 02/02/10)	12/29/09 - Major ATS Release of Secured Modules for Testing and Unsecured Enhancements (7 Days Late)	TBD - Define new ATS Production platform for July/August 2010 Deployment

ATS Re-Engineering Schedule As of December 31, 2009

Color Key: ■ On Schedule ■ Late ■ Impact

ATS Roll Production Overview – Master Timeline



ATS Re-Engineering Project Estimate Update

As of December 2009

- **The project cost estimate was updated and presented to the Board on October 6, 2009. The estimated total cost is \$21.4 million.**
- **Financing of the remaining portion of the project was also approved by the Board on October 6, 2009, along with the financing for PTMS.**
- **An ASR for the amendment and extension of the ACS contract through June 2011 is on the February 9, 2010 agenda. This amendment is consistent with the details of this report and the Oct 6, 2009 cost update.**
- **The ATS project is on schedule and within cost through Dec 2009.**

ATS Re-Engineering Project Budget

Assessor Department (as of Dec 30, 2009)

ATS Re-Engineering Summary of Cost and Budget Estimate (\$ in Whole Numbers)

Category	Actuals FY 2004-08	Actuals FY 2008-09	Projected FY 2009-10	Projected FY 2010-11	Total
Contract Programming Services (002/127/038)	\$7,658,208	\$6,019,437	\$6,241,935	\$730,000	\$20,649,580
Hardware/Software/ Training (002/12P/038)	85,730	15,037	560,000		660,767
IV & V – Eclipse Solutions		79,360			79,360
Total	\$7,743,938	\$6,113,834	\$6,801,935	\$730,000	\$21,389,707
Contingency					
Total Cost (Rounded)					\$21.4 Million

Cumulative Expenditure to date **\$15,936,641**

CEO Finance has implemented a Board approved financing plan to complete this project.

**\$6.7 Million from Fund 038
to Complete**

NOTE: This projection does not include any undefined costs, internal or external, for unexpected events or new legal requirements.

ATS Re-Engineering Reports

- **Quarterly status and progress reports to the Board of Supervisors:**
 - **April, 2010 (next update)**
 - **February 2, 2010**
 - **October 6, 2009**
 - **May 12, 2009**
 - **January 27, 2009**
 - **September 9, 2008**
 - **June 17, 2008**
 - **April 15, 2008**

Next ATS Re-Engineering Updates

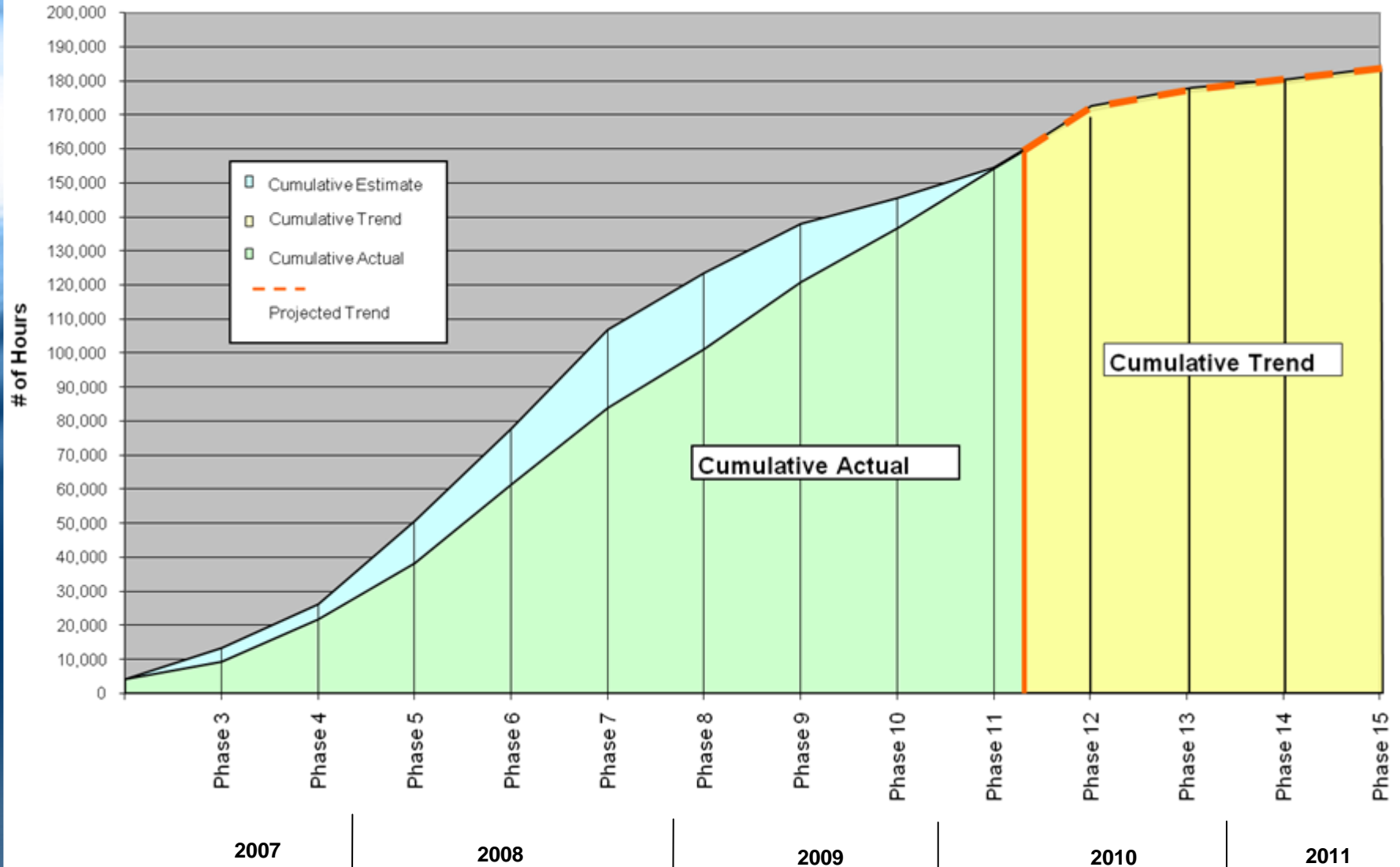
- **Next update will be in April/May 2010 and progress reporting on:**
- **The new Secured systems updates for stress testing, data conversion, database, stored procedures assessments, user interface, Unsecured systems interface and Data Center related operations and maintenance; this process will continue through March/April 2010**
- **The new ATS production platform stress testing through March 2010 and a final configuration will be defined. The platform may be upgraded as necessary for final deployment in July/Aug 2010. Some considerable planning and execution is ongoing and will be adjusted as required.**
- **The new Secured systems update related to accelerating development, schedule and cost update, progress on four major milestone releases planned during 2009/10, and cut-over planning for July/August 2010.**
- **Status of the PTMS platform and COB systems interface to ATS**

Next ATS Re-Engineering Updates

- **Roll production transition planning from the old to new ATS platform – this work will be ongoing from July 2010 through July 2011.**
- **The new ATS platform and systems development is on schedule to produce the July 2011 rolls.**

Questions?

ATS Development - Cumulative Work Hours Estimate vs. Actual



Secured Sub-Systems Phased Delivery Schedule

Estimates As of December 31, 2009

We are here.

Release 1

Release 2

Release 3

Release 4

Near Production

Phase 6 to 8
Mar. 1, 2008 to Feb. 28, 2009

Phase 9
Jun. 30, 2009

Phase 10
Oct. 31, 2009

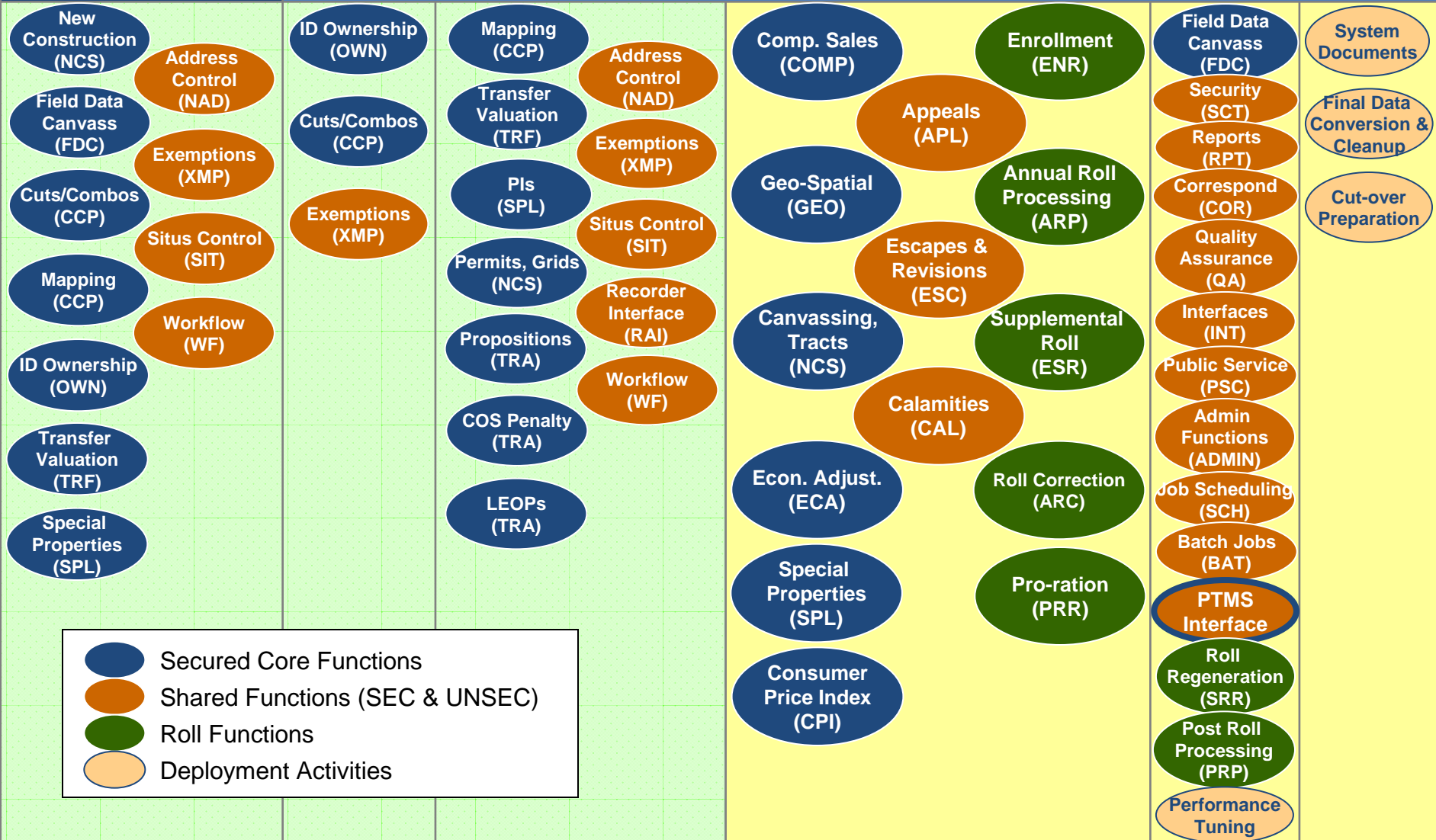
Phase 11
Feb. 28, 2010

Phase 12
Jun. 30, 2010

Phase 13
Oct. 31, 2010

Prototype Mock Ups

Functional Module Delivery



- Secured Core Functions
- Shared Functions (SEC & UNSEC)
- Roll Functions
- Deployment Activities