



Project Initiation Document Template

26 Oct 2022 / Stacy Petersen

Complete

Score	0%	Flagged items	0	Actions	0
Document Code					000005
Company Name					SC Consulting, Inc.
Department					Information Technology
Project Title					iAuditor Project
Project Code					SCIT-1D32X
Prepared By					Stacy Petersen
Date Prepared					26.10.2022 14:53 PST

1. Project Summary

1.1 Project Title	iAuditor Project
1.2 Proposed Budget	247239.00
1.3 Expected Start Date	01.01.2023
1.4 Expected End Date	31.10.2023

2. Project Definition

2.1 Background

Briefly discuss how the project came to be.

SC Consulting has transitioned to a decentralized company model in the previous two years due to an expanding customer base. The management of our employees has become more complicated as we continue to assist more clients in more places. Many of our internal needs, such as reporting, payroll, and resource management, were previously handled by antiquated mainframe systems. These old systems have proven insufficient to efficiently manage these administrative duties as our staff grows in size and area.

Over the previous 12 months, this deficiency has manifested in rising costs and increased personnel turnover. For this reason, SC Consulting needs to transition to a web-based application to better manage our administration, save costs, and eliminate staff turnover, as detailed in this project initiation document for the iAuditor Project.

With this initiative, employees will play a more crucial role in managing their administrative difficulties, have safe online access to timesheets, and the company will be able to handle their administration from a single, centralized platform.

2.2 Project Objectives

Describe what the project aims to achieve.

Objective

Objective 1

Specify

Process Efficiency

Describe

SC Consulting will be able to manage its employee payroll systems and administrative duties in a more smooth and unified manner by moving to a centralized web-based administrative platform.

Objective 2

Specify

Overhead Costs and Expenses

Describe

The overhead costs associated with the huge workforce currently required to manage these duties will be reduced by 15% because of this technological shift.

Objective 3

Specify

Accessibility

Describe

Employees that work in a decentralized environment will have more control over their payroll elections, training, reporting, and other administrative chores.

Objective 4

Specify

Accuracy and Timeliness

Describe

The company will receive more timely and accurate financial reporting given our regional managers' capacity to enter and regularly update their financial indicators.

2.3 Scope and Limitations

Summarize what areas the project will cover.

The iAuditor Project covers payroll and other administrative tasks. These tasks will be migrated from the outdated mainframe system to a web-based platform, resulting in increased efficiency in terms of company resources and business processes. Because it employs technology to improve the way we do business, the iAuditor Project is also in line with corporate strategy and objectives.

Explain what areas fall outside the scope of the project.

The iAuditor Project does not include non-administrative tasks that require specialized software outside of the company, such as but not limited to:

- Project management
 - Customer relationship management
 - Website and software development
 - Communications
 - Sales and marketing
-

2.4 Project Deliverables

Provide a complete list of outputs that the project will deliver.

Deliverable

Deliverable 1

Deliverable

iAuditor Web Platform

Description

The iAuditor system will be created by the IT development team once the software and licenses are purchased.

Projected Deadline

18.09.2023

Deliverable 2

Deliverable

Training Materials

Description

These materials will be used for training employees on using the new web-based platform.

Projected Deadline

16.10.2023

Deliverable 3

Deliverable

Payroll and Administrative
Database

Description

The information stored in this database will be compiled and migrated to the new platform.

Projected Deadline

10.07.2023

3. Benefits and Costs

3.1 Benefits

How will the company benefit from this project?

Replacing SC Consulting's legacy payroll and administrative system with a web-based platform will considerably improve the efficiency of day-to-day payroll and administrative operations and reporting. Moreover, by providing employees with more autonomy and freedom, they have fewer overhead costs and lower turnover rates. Managers can also recalibrate their focus on substantive duties rather than spending a substantial amount of time on non-billable tasks or administrative chores that aren't billable.

Provide supporting documents, if applicable (e.g., business case proposal, case study).

[iAuditor-Project-Business-Case.pdf](#)

3.2 Costs

What are the drawbacks in carrying out this project?

There are limited IT resources available to support the iAuditor Project along with other ongoing IT initiatives. Moreover, since its implementation will be done internally and not by the product developers or vendors, there will be limited support from the software providers.

Provide supporting documents, if applicable (e.g., risk management plan, risk analysis document).

4. Roles and Responsibilities

In this section, assign roles for each person and describe what their tasks and responsibilities will be for the project. You can also upload a copy of your organizational chart to clearly map out the hierarchy of reports for the project.

4.1 Project Sponsor

Who is the person assigned to this role?

Fritz McNeill

What are their responsibilities?

- Align the project's business case with the vision, mission, goals, and strategies of the company
- Provide adequate support and resources critical to the success of the project
- Assign roles and responsibilities to the project team
- Work with the project manager to ensure that the project is properly initiated, planned, and carried out

4.2 Project Manager

Who is the person assigned to this role?

Stacy Petersen

What are their responsibilities?

- Define the project's objectives, scope, and deliverables
- Ensure that the project follows the proposed schedule and budget
- Handle and distribute project resources
- Relay important updates and information to stakeholders
- Provide proper documentation throughout the project lifecycle

4.3 Project Team

Who are the persons assigned to this role?

IT Development Team,
Resource Management Team,
Learning and Development
Team

What are their responsibilities?

IT Development Team

- Create the iAuditor web-based platform for payroll and administrative tasks
- Troubleshoot in case of errors in the platform
- Communicate closely with the Project Manager for weekly and monthly updates

Resource Management Team

- Secure software licenses and hardware equipment necessary to develop the platform
- Submit procurement and expense reports to the Project Manager on a monthly basis
- Ensure that procured items fall within the project's budget

Learning and Development Team

- Collaborate with the IT development team in creating training materials before rolling out the platform
- Provide quality training for current and prospective employees for using the new platform

4.4 Support Staff

Who are the persons assigned to this role?

N/A

What are their responsibilities?

Provide supporting documents, if applicable (e.g., organizational chart).

Project Strategy

In this section, discuss the actions and milestones to be carried out during the project. It allows you to explain your monitoring mechanisms, benchmarks for success, and communication strategies. You can also attach your project plan at the bottom part.

Project Schedule

Event/Milestone

Event/Milestone 1

Assignment

Hardware/Software will be procured, and the iAuditor system will be created in the web-based environment and tested by the IT development group.

Deadline

03.03.2023 00:00 PST

Deliverable(s)

Event/Milestone 2

Assignment

IT team will set up a temporary legacy platform in the technology lab to be used for day-to-day operations for payroll and administration activities. This will be used as a backup system while archiving all data from the company mainframe.

Deadline

07.04.2023 00:00 PST

Deliverable(s)

Event/Milestone 3

Assignment

The web-based platform will be populated with all current payroll and administrative data. This must be done in conjunction with the end of a pay cycle.

Deadline

19.05.2023 00:00 PST

Deliverable(s)

Event/Milestone 4

Assignment

All employees will receive training on the new web-based platform.

Deadline

16.06.2023 00:00 PST

Deliverable(s)

Training manual(s)

Event/Milestone 5

Assignment

The web-based platform will go live and the legacy mainframe system will be archived and stood down

Deadline

20.10.2023 00:00 PST

Deliverable(s)

Project Closure Report

Project Control Measures

What are the metrics for measuring the project's performance against its goals?

- Accessibility - The user interface of the platform is simple enough for all employees to use, learn, and understand.
 - Efficiency - The web-based platform runs smoothly and quickly in real-time.
 - Accuracy - The data uploaded to the server accurately reflect those from the old mainframe system.
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How will the project's progress be monitored?

Quarterly reviews will be conducted with the management. Each team will also have monthly sync sessions with the Project Manager to make sure things are going as scheduled.

What strategies can be implemented to communicate these details with stakeholders?

The Project Manager will relay updates using iAuditor's Heads Up and collaborative actions features.

Provide supporting documents, if applicable (e.g., project plan).

Approval

Comments

For the iAuditor Project, the following assumptions apply:

- On the new web-based system, all staff and employees will be properly trained in data input, timesheet entry, and reporting activities.
- Money will be available to buy web-based system hardware and software.
- All department heads will lend their support to ensure that the project is completed successfully.
- There will be adequate management support and backing for the project.

Other Supporting Documents

Approval Date

27.10.2022 00:00 PST

Approver Name and Signature



Stacy Petersen
27.10.2022 07:23 PST

Appendix

[iAuditor-Project-Business-Case.pdf](#)