



Program #78340 - Enterprise Resource Planning Historical Data Retention FY 2025 Proposed

Department: County Assets **Program Contact:** Tony Chandler
Program Offer Type: Capital **Program Offer Stage:** Proposed
Related Programs:
Program Characteristics: New Request, One-Time-Only Request

Executive Summary

Historical employee data resides on hardware and software that has reached its end of life. This project will move the data to a sustainable solution that meets data retention requirements. This program is expected to be completed over two years.

Program Description

When Multnomah County replaced its core Enterprise Resource Planning (ERP) system, not all historical data was migrated to the new platform. The historical data (prior to end of year 2018) that was not migrated remains in a static instance of the County’s legacy ERP software and hardware platform. To support long term data retention and records availability, this program will transition legacy data to a new database and server platform. The effort to do so will be significant for IT and business partners in the Department of County Management primarily Human Resources (HR) and Finance. The project analysis is underway and full cost estimates will need to be refined as the final technical solution is determined. This project is designed to identify solutions that meet the functional and retention requirements.

This program will perform analysis, develop mitigation options, and execute on a plan to move historical ERP data to a solution that allows for access to the data, meets data retention requirements and provides for a long term strategy to meet both of those expectations. From an equity perspective, this offer supports the ongoing availability of data required for historical pay equity management.

The program will strive to make all the required data available via reporting to support internal operational activity, public records requests and overall data retention requirements. Program resources will include teams from Information Technology, internal HR and Finance teams, as well as potential vendor partners.

This project is expected to be complete within two years. A follow on program offer for FY 2026 will be necessary to complete the project. The estimated total cost of this two year project is \$1.5 million and the yearly maintenance cost estimate is \$150,000.

Performance Measures

| Measure Type | Performance Measure | FY23 Actual | FY24 Budgeted | FY24 Estimate | FY25 Target |
|--------------|---|-------------|---------------|---------------|-------------|
| Outcome | Legacy ERP data transitioned from legacy platform to support operational and data retention requirements. | N/A | N/A | 0% | 50% |
| Outcome | A sustainable software and hardware platform is set up to host the County's transitioned legacy ERP data. | N/A | N/A | 0% | 100% |

Performance Measures Descriptions

- PM #1 - Required data is both protected and available as required for retention and operational needs
- PM #2 - Software and hardware solution meets standards and is affordable

Legal / Contractual Obligation

Data retention requirements per Executive Rule 301(Retention of Public Records) - in order to meet Department needs based on legal, fiscal, administrative and historical value.

Revenue/Expense Detail

| | Adopted General Fund | Adopted Other Funds | Proposed General Fund | Proposed Other Funds |
|------------------------|-------------------------|------------------------|--------------------------|-------------------------|
| Program Expenses | 2024 | 2024 | 2025 | 2025 |
| Contractual Services | \$0 | \$0 | \$0 | \$1,000,000 |
| Total GF/non-GF | \$0 | \$0 | \$0 | \$1,000,000 |
| Program Total: | \$0 | | \$1,000,000 | |
| Program FTE | 0.00 | 0.00 | 0.00 | 0.00 |

| Program Revenues | | | | |
|----------------------|------------|------------|------------|--------------------|
| Financing Sources | \$0 | \$0 | \$0 | \$1,000,000 |
| Total Revenue | \$0 | \$0 | \$0 | \$1,000,000 |

Explanation of Revenues

This funding is a one-time-only general fund cash transfer to fund 2508 Information Technology Capital Fund.

Significant Program Changes

Last Year this program was: