Office of the Chief Information Officer

Document Management and eSignature

Project Manager: Steve Lind
Project Sponsors: Enrollment Services, Business & Finance, Accounts Payable & Legal Affairs

Overview
In FY15, OCIO will implement:
• An enterprise document management system to store electronic documents (replacing several dated systems) and
• A system for routing and recording electronic signatures (DocuSign) that will ultimately integrate with the document management system.

Together, these two systems will greatly reduce the time and the effort it takes for faculty, staff and students to conduct transactions that require signatures, it will streamline signature-based approvals with our vendors and other partners, and it will make it much easier for individuals in different offices to find, retain and secure important university records.

Rationale
It can take weeks to get common approval processes completed at OSU because physical documents must still be walked or mailed for physical signatures. It can take weeks to locate important university records because those records are stored in a variety of locations across campus. This project will streamline university processes by making paper-based forms, form routing and signatures 100% electronic and it will enable individuals to find important records quickly since they will be indexed and stored electronically in a common location.

This project will save units time and make it easier for units to comply with security and retention policies.

Results
In the first year of this initiative, we plan to:
1. Complete the eSignature service offering and make the service available to the university.
2. Create the new document management environment and begin conversion from the current DocFinity and DCM systems.
3. Plan the remaining conversion work and begin working within the university to implement new uses for the system.

End results
These services will provide simple, secure and mobile solutions for electronic signature capture, document management and retention and workflow for all university colleges and departments.

Milestones
• Q2 FY15 – Document management infrastructure available to project team
• Q2 FY15 – Document management integration work begins
• Q3 FY15 – Publish new services to Service Catalog
• Q3 FY15 – Migration from DocFinity and DCM systems begins
• Q3 FY15 – eSignature service offering and user training available
• Q4 FY15 – Timelines for remaining document management migrations identified
• Q4 FY15 – Prioritization of new applications and implementations

Risks
• Funding commitments for Earnings Service
• Timing of data center migration project

Resources
People and their roles
• Sri Chakravartty – Service owner
• Steve Lind – Manager and PM
• Darryl Jordan – DocFinity service owner
• Dan Noonan – Archivist

Other resources
• Subject matter experts within Colleges and Units
• OCIO staff:
  • Infrastructure and applications
  • Marketing, communications and training
  • Enterprise Security
  • Vendor resources

Run
The project is being led by the Office of the CIO.

The project will be managed through three coordinated teams:
• The Working Team is comprised of SMEs and technical staff and will meet weekly. This team is focused on day to day project delivery.
• The Project Leadership Team will provide operational guidance to the Working Team. This group will meet bi-weekly and resolve open issues.
• The Project Steering Committee will provide strategic guidance for the project and will meet monthly. This team will be the ultimate escalation point for issue resolution.

The EDM service will be a cost recovery service – colleges and departments will pay for the service.

Rollout plan
The document management and eSignature service offerings will transition from project to production in a phased approach.

Once the production environment and support services are available, individual units will be migrated to production based on identified requirements and constraints.

Review
Project wrap-up and review
Upon completion of this project, two new service offerings will be available to the university.

The processes and procedures developed during the project will be reviewed and updated for use in the continued adoption and roll out of the services.