# Project Description/Issue Statement (may include project triggers):

Implement DocuSign as the university wide E-Signature product

# Goals & Objectives:

## Strategic Goal(s) Supported

To make current cloud-based productivity services available to OSU Students, Faculty and Staff, in support of the OSU strategic plan to provide the OSU community the ability to access their information, share their files, and collaborate with others from any device, anywhere they can access the Internet

## Business Objectives

To deploy an esignature capability that will reduce paper-based activities, improve processing time, and create a more inituitive and delightful user experience.

## IT Objectives

To provide leadership, coordination, and structure to the deployment of an esignature tool. This will include establishing governance, authentication/authorization processes, data integration, and project management.

# Project Governance

|  |  |
| --- | --- |
| Role | Name/Org |
| Project Sponsor | Kent Kuo |
| Project Manager | Hollie Pitts |
| Product Manager | TBD |
| Project Owner | Investor’s Council |
| Project Advisory Board | Steering Committee |
| Project Technical Resources | Lance Duddlesten, Data IntegrationJosé Cedenõ, API Web Services |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| Functional | Implement and integrate DocuSign  |  |
| Organizational | Enable campus departments to be able to gain the greatest use of this product possible | To do the work for the departments |
| System |  |  |
| *All other Scope* | Establish and publish a data dictionary to enable data to propagate between systems |  |

# Flexibility Matrix:

|  |  |  |  |
| --- | --- | --- | --- |
|  | Least Flexible | Moderately Flexible | Most Flexible |
| Scope | X |  |  |
| Schedule |  |  | X |
| Resources |  | X |  |

# Key Project Deliverables

1. Implement DocuSign
2. Establish governance and product ownership for the ongoing sustainability of the product
3. Have the product appropriately branded for OSU
4. Complete a sub-project for each investor
5. Build and communicate the sustainable processes for the ongoing operational rollout of the product
6. Create a data dictionary of Common Tags – for use by those who need to extract data from one of our central ERP databases, or add data to it.
7. Plan and implement the data integrations necessary for the Investor’s sub-projects
8. Plan and implement reporting capabilities necessary for the Investor’s sub-projects
9. Plan and implement an effective system for granting user access to the appropriate DocuSign role(s)
10. Create a Business Process Re-engineering service for use by those attempting to implement DocuSign enabled processes
11. Create and publish a web page focused on the E-Signature product

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
|  Establish SSO authentication |   |
|  Complete initial org design/training |   |
|  Define access authorization processes |   |
|  Establish initial data dictionary |   |
| Establish product web site |  |
|  Build effective/intuitive training modules |   |
| Establish governance structures and processes |  |
| Determine initial use cases, prioritization and timeline |  |
| Define BPR processes |  |
| Confirm and implement OSU Branding models |  |
| Enable data to propagate with initial data integrations using Docusign APIs |  |
| Utilize Retrieve and Connect to mine Docusign data and analytics |  |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| PM |  75% initially50% long term | Hollie Pitts, ECS |
| Data Dictionary Owner | 75% initially25% long term |  Diana Lindsley, CORE |
| Developer | 50% |  MIST team, Jose Cedeno’s team |
| Data Custodian Team Member, from each DC | 20-30% for 3-6 months  | Varied |
| Marketing developer  | 100 % for 2 weeks | Kegan Sims, David Baker |
| Process Sub-Committees | 20% for 6 weeks | Steering Committee |
| Web page developer | Sporadically | Jared Kosanovic |

# Service

|  |  |
| --- | --- |
| Item | Name/Org |
| Owner (when project completes) | Investors Council |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project | $192,500 |
| Ongoing Annual Cost | $78,650 |
| Total Benefits | Dollars |
| One-time Savings |  |
| Annual Savings |  |

## Funding Source

Initial Costs: Budget Office and Initial Investors

Ongoing Costs: Budget Office

## Benefit Description (e.g. revenue increase)

# Dependencies, Assumptions and Constraints

 Local and vendor resources and contributions are made and completed in a timely manner, and real effort is made to do business process reengineering.

# Project Performance Measures (opt)

# Known Issues and Risks (of proposal)

Involvement of document owners in creating electronic documents and redesigned business processes.

General note…doesn’t have to be just one page.

1. Project Description/Issue Statement
Summarize the project and business problems to be solved.
2. Goals & Objectives
Describe the major goals and objectives of the project from both a business perspective and an IT perspective, if relevant. [Note: clarify language that business objectives should be in terms of capabilities needed – not assets/IT language, etc]
3. Project Governance

List the individuals assigned in directing the project

1. Project Scope
Describe what is in and out of scope from a functional (boundaries around what the solution does), organizational (who is affected) and systems (which systems or infrastructure is involved) perspective.
2. Flexibility Matrix
Assess where the flexibility will reside for the project to react to uncertainty as the portfolio is created. The assessment is relative between the three factors.
3. Key Project Deliverables
List deliverables for the project in terms of business and process capabilities rather than *in terms of changes to particular applications/assets*.
4. Preliminary Schedule and Milestones
List the anticipated start and end dates of the project. Include dates of required interim milestones as appropriate.
5. Staffing estimates
List the estimated roles and % FTE required to complete the project (e.g 50% DBA, 10% web programmer).
6. Service
Enter the proposed long-term owner of the delivered solution when the project completes.
7. Financial Estimate (summary of cost-benefit analysis)

Under Total Costs, list the expected cost to deploy the project (include software, hardware, vendor costs, training, travel, marketing, etc.). List the expected annual cost to maintain the delivered solution (include maintenance fees, service costs, renewals, additional staffing, etc.)

Under Total Benefits, list the expected income or recovery costs (people, hardware, software renewals, additional fees, etc.)

Under Funding source, list the index/account, grant name or organization to provide funding

1. Dependencies, Assumptions, and Constraints
List related project deliverables, important assumptions made, and imposed constraints. Note if the project's benefits are dependent on other project delivery dates, business projects/events or seasonal trends (e.g., in time for back-to-school).
2. Issues and Risks
Document any anticipated issues and risks with the project that should be considered during portfolio planning.