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

This project was triggered because Nolij is being discontinued by the product owner.

The project is the Implementation of Hyland OnBase Enterprise Content Management System including:

\*Migrating existing Nolij implementations into OnBase.

\*Creating 1 new implementation by June 30, 2018

\*Creating 7 new implementations by June 30, 2019

\*Creating 8 additional new implementations by June 30, 2020

# Goals & Objectives:

## Strategic Goal(s) Supported

Implementation of Hyland OnBase will support OSU’s Strategic Plan by making a major contribution to the updating and stabilization of the information infrastructure upon which the community depends.

## Business Objectives

Full implementation of OnBase will enhance the productivity of OSU’s administrative teams by providing:

\* Efficient and controlled access to documents,

\* Enhanced security for our records repository, and

\* A current technologic environment that will enable better communication within OSU and with our external partners by providing strong workflow capabilities and tight integration with web forms

## IT Objectives

Implementation of Hyland’s OnBase product will directly support two of our objectives:

\* Fully embrace contemporary solutions for productivity, supporting communication and collaboration activities that are fully device and location independent, supporting the complex work styles of our community members.

\* Invest in technology-enhanced administrative services when accompanied by business process improvements to create true efficiency in the work experience.

# Project Governance

|  |  |
| --- | --- |
| Role | Name/Org |
| Project Sponsor | Kent Kuo |
| Project Manager | Hollie Pitts |
| Product Manager | Brad Dennis |
| Steering Committee Member | Kristin Benson, Associate Registrar |
| Steering Committee Member | Mark Bierly, Business Analyst, VP for Research |
| Steering Committee Member | Rosemary Garagnani, Assistant Dean, Graduate School |
| Steering Committee Member | Dan Hough, Business Ops IT Mgr, Business Affairs |
| Steering Committee Member | Erin Rau, Assoc Director of Ops, Admissions |
| Steering Committee Member | Linda Sather, Assoc Director, Human Resources |

# Project Scope:

|  |  |  |
| --- | --- | --- |
| Scope | In | Out |
| Functional | Create and implement document purging in Nolij for departments as needed.  Migrate the current document repositories from Nolij to OnBase for each department. Validate 1% of the documents migrated.  Implement document storage/retrieval/retention for all OnBase departments  Implement OnBase workflows for Nolij departments that currently have workflows.  Create 16 new implementations in OnBase,  utilizing the enhanced functionality OnBase provides where feasible:   * Unity Forms * EDI TS 130 Processor * COLD/ERM * DocuSign Integration * PDF Filter * XML Tag Import Processor * Enterprise Application Enabler * Reporting Dashboards | We do not guarantee that we can replicate every feature that exists in Nolij.   * Document annotations may be unmigratable   Unless approved as one of the 16 “new” implementations:   * Implementation of workflows that are not relevant to the Nolij migration * Integrations to software not specified in the milestone list below * Using OnBase to replace functionality of other software in use   Mid-project revisions.  Revisions of accepted implementations. |
| Organizational | This implementation affects all current Nolij departments and will affect other departments who choose to develop implementations. |  |
| System | Dependence upon Nolij will be ended. Integrations to Banner, DocuSign, BennyBuy, Benny Hire and two other Salesforce implementations will be built. |  |

# Flexibility Matrix:

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

# Key Project Deliverables

Migration of existing NolijWeb documents into OnBase repositories.

OnBase implementations for each existing NolijWeb implementation.

Creation of 16 OnBase implementations which provide additional Enterprise Content Management functionality to OSU.

# *Preliminary* Schedule and Milestones:

|  |  |
| --- | --- |
| Milestone | Date (mm/yy) |
| Create initial project schedule | 4/30/18 |
| Build OnBase Web Site | 4/30/18 |
| Build bidirectional Nolij/OnBase Sync | 5/30/18 |
| Hire AP2 | 5/30/18 |
| Build / Implement prototype project ( a component of Banner Access) | 5/30/18 |
| Build Banner -> OnBase Sync for nightly processing | 6/30/18 |
| Hire/train image migration validators | 6/30/18 |
| Create first “new” implementation (Staff Fee Privilege) | 7/31/18 |
| Implement Admissions (includes two SalesForce integrations) | 9/25/18 |
| Implement Admissions: Cascades | 9/25/18 |
| Implement Admissions: Grad School | 9/25/18 |
| Implement Admissons: INTO | 9/25/18 |
| Implement Office of International Services | 9/25/18 |
| Build ODS integration | 10/31/18 |
| Create second “new” implementation | 10/31/18 |
| Implement Office of Financial Aid | 12/31/18 |
| Create third “new” implementation | 12/31/18 |
| Create 4th “new” implementation | 1/31/19 |
| Create 5th “new” implementation | 2/28/19 |
| Create 6th “new” implementation | 3/31/19 |
| Implement Crop & Soil Science Personnel | 3/31/19 |
| Implement Human Resources (includes a Benny Hire SalesForce integration) | 4/30/19 |
| Implement Payroll | 4/30/19 |
| Implement 7th “new” implementation | 5/15/19 |
| Implement Veterinary Medicine | 5/31/19 |
| Implement Student Health | 5/31/19 |
| Implement Student Finance | 6/30/19 |
| Create 8th “new” implementation | 6/30/19 |
| Implement Promotion and Tenure | 7/31/19 |
| Implement 9th “new” implementation | 7/31/19 |
| Implement COB Personnel | 8/30/19 |
| Implement 10th “new” implementation | 8/30/19 |
| Implement Accounts Payable (includes GRRS and BennyBuy integrations) | 10/31/19 |
| Implement Grants | 10/31/19 |
| Implement PCMM (includes Total Ccontract Manager integrations) | 10/31/19 |
| Implement Council of Head Advisors | 11/30/19 |
| Implement COB Advising (or combine with CHA) | 11/30/19 |
| Implement 11th “new” implementation | 11/30/19 |
| Implement Student Health: Cascades | 12/31/19 |
| Implement Office of the Registrar | 1/31/20 |
| Implement 12th “new” implementation | 2/28/20 |
| Implement 13th “new” implementation | 3/31/20 |
| Implement 14th “new” implementation | 4/30/20 |
| Implement 15th “new” implementation | 5/31/20 |
| Implement 16th “new” implementation | 6/30/20 |

# Staffing Estimates

|  |  |  |
| --- | --- | --- |
| Role | Effort | Name/Org |
| Project Manager | 100% | ECS – Hollie Pitts |
| Product Manager | 75% | ECS – Brad Dennis |
| Programmer Analyst  Level 3 | 100% | ECS – permanent position – Annie Leeson |
| Programmer Analyst Level 2 | 100% | ECS – 2 year term position |
| Systems Integrator | 50% | ECS – Lance Duddlesten |
| Document Repository/Migration Manager | 50% | ECS – Frank Kessel |
| 2 Migrated Image Validators | 100% each | Temporary positions |

# Service

|  |  |
| --- | --- |
| Item | Name/Org |
| Owner (when project completes) | Kent Kuo, Director of Enterprise Computing Services |

# Financial Estimate (opt.)

|  |  |
| --- | --- |
| Total Costs | Dollars |
| Initial Cost of Project | FY18-FY19: software - $49,809; hosting $100,000; training&setup $34,148; BPR $7,000;  Personnel Resources listed above |
| Second Year Costs | FY20: software $77,000; hosting $100,000; Personnel Resouces as listed above |
| Total Benefits | Dollars |
| One-time Savings | FY18-FY19: $99,616 |
| Second Year Savings | FY20: $49,808 |

## Funding Source

Initial Costs: JIS201, JHYD

Ongoing Costs: JIS201, JHYD

## Benefit Description (e.g. revenue increase) We will have a supported Enterprise Content Management system. We also expect increased system functionality beyond what has been developed for NolijWeb.

# Dependencies, Assumptions and Constraints

Migration of departments to Banner 9 takes priority over migration to Hyland OnBase. This dependency could materially slow progress on the OnBase implementation.

# Project Performance Measures (opt)

The Hyland OnBase Implementation project will be considered complete when all existing NolijWeb departments have been migrated and the sixteen new implementations have been completed.

# Known Issues and Risks (of proposal)

We will be doing this implementation without using professional services from Hyland. This may result in a somewhat extended/protracted implementation, or in having to do some rework as we learn more about OnBase. Also, having no professional services to guide us in estimating the time to migrate, we may find that it takes longer than anticipated.

We are migrating our document repository to a cloud hosted system which will result in a change in the way we access our images and data. We will be required to build API tools to access our information. Whether this will impact the overall schedule is unknown.

OnBase has a more limited document “annotations” feature than Nolij does. This will impact our ability to migrate the annotations in our existing repository which will be problematical for certain user groups. It will also “reduce” the functionality of annotations which our users have come to expect and depend upon.

* To mitigate this issue, we will need to:
  + Assist groups in finding alternate capabilities within OnBase to meet their needs (“Notes” and additional KeyWords”),
  + Store .tif copies of other document types (as well as the originals) because only .tifs may be annotated in OnBase,
  + And, *hopefully,* we may be able to create .tif copies of our annotated documents, with the annotations burned into those copies, to avoid actually losing some of them.

A major risk is the requirement of significant effort by each department being migrated. Departmental staff unavailability may impact both the time required to complete the department’s implementation, and the project as a whole.

This migration is being accomplished with minimal ECS staff. Significant interruption in the availability of any of them, will materially slow the completion of the project.

Will be using an unsupported version of Nolij during the course of the project.