IT Governance Document Management and Digital Forms Project Requests

Summary of the 4 projects submitted for Digital MIT funding:

- (1) Education Systems Forms and (4) Outside Professional Association projects both are data capture / workflow initiation efforts, not classical document management storage & retrieval. These projects are about adding structured transactional data to a database and not the attachment of documents. The document is not the end result, it is just a vehicle to collect/process the data. Both could potentially benefit from a forms builder tool that come with an Enterprise Document Management System (DMS).

- (2) OSP Awards Documents and (3) Enterprise Digital Document Repository with Audit Division projects are classical document management projects. Pre-existing paper and electronic documents that are unstructured and need to be stored, tagged, retained, and disposed. The document itself is important, not just the data. Need a process for new forms and docs coming in. Need ability to search and integrate. Setting up good metadata, authorizations, retention rules, and using SQL compliant databases that allows future access/integration are important first steps.

Recommendations:

- **Education Systems Forms** – Because of tight data integration with MITSIS, proceed with development of 5 priority web-based forms using Open Symphony workflow product and Education Systems development platform, java/oracle.

- **OSP Awards Documents** – Continue with Phase 1, develop a framework for the storage of documents in Coeus (collect document management requirements, define business rules etc). If documents are tagged well, they can be accessed from within the Coeus data store by other systems, or at a future date migrated to the Enterprise DMS Repository with metadata needed for access.

- **Enterprise Digital Document Repository with Audit Division** – Upon purchase of Enterprise DMS, perform pilot project with Audit division.

- **Outside Professional Association** - Replace paper process with web based forms engine. IS&T DCAD to assess web application development versus leveraging Enterprise DMS eForms builder.

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Single repository would require migration of other data stores into DMS repository.
With Multiple data stores that have document attachment features, access to those documents via the DMS would involve metadata and connectors.
Standard for data stores should be SQL compliant Databases. The above run on Oracle DB.