

Pathway Goal: Infrastructure and Shared Governance **Report:** Year-End: May 2018
Action Item # 3-2

Action Item Description:

Address an array of urgent issues to improve business processes:
document imaging and management

Submitted By:

Name	Department
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Working Group Members:

Name	Department
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Process and Timeline: Provide a brief summary of the year-long process for your working group.

Document Imaging and Management (Nancy/Diane Chase)

- Merge document imaging system plan and identity management system with tech infrastructure committee.

A document imaging and management funding request was submitted in Spring 2017. Funds were not allocated for the project.

Describe what has been accomplished so far this year.

The project is on hold until the funding is secured.

Identify next steps.

Determine prioritization of the document imaging and management project in light of other major campus initiatives.

What will your final product be at the end of the year? Such as, what metrics which will be used to assess your progress/achievement, will a report be generated, etc?

If the project moves up the priority list, a new budget proposal will be submitted.

You may have reference material to attach to this report. Select from the list.

No additional reference material

OR

Any material generated by this working group (if completed at this time)

Additional information to include (optional).

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End of Mid-Year Report
Remainder of the report will be completed in May.

Year-End

This portion is to be completed in May.

2017-18 Accomplishments.

- Funding for the initial ongoing costs (i.e., staff and operating expenses) for a new enterprise document management solution was secured in FY18.
- Funding for the initial one-time costs of the document management have been requested as part of the UNLV Capital Improvement Funds (CIF)/General Improvement Funds (GIF) to go before the Board of Regents in June 2018 for approval.
- In accordance with the IT Master Plan initiative, an initial group is being formed to create a formal recommendation regarding the adoption of an enterprise-level document management solution. The recommendation will include: a plan for product selection, a project timeframe, expected one-time and ongoing costs, information about the relationship to records retention, and other items that will determine product selection and implementation (e.g., whether the solution will be a cloud solution or one hosted by the campus).
- The group will also propose a cross-campus implementation team comprised of members from units who already have or are in need of document management services. The team will guide the initial implementation and make recommendations regarding potential post-implementation issues and future directions of the service.

SWOT Analysis: Determine the strengths, weakness, opportunities, and threats presented in the data.

Strength(s)	Initial ongoing funding for the project has been secured. One-time money is being requested. All other Nevada System of Higher Education entities use the same document management product. If there is leadership agreement and purchasing approval, UNLV may be able to take advantage of existing contracts to avoid having to engage in a protracted procurement cycle.
Weakness(es)	None now but some may emerge as the campus conversation begins.
Opportunity(ies)	The document management project will be informed by current records retention efforts to ensure that documents are kept as long as they need to be but no longer than is necessary.
Threat(s)	The project has taken so long to get underway that some campus entities have pursued solutions within their unit. If not managed well, those with current solutions could be resistant to move to an enterprise-level solution.

2018-19 recommendations and next steps

- **What does the SWOT analysis reveal?**
- **What should the goals / activities be for the subcommittee?**
- **Who should be responsible?**

The next steps are to:

- Ensure the final CIF/GIF request that goes to the Board of Regents includes funding for the one-time document management solution costs.
- Form the high-level group that will create a comprehensive recommendation for consideration by the Technology Advisory Committee (TAC - the highest-ranking IT governance group).
- Upon TAC approval, form the document management project implementation committee.
- Procure the product
- Begin the implementation

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Additional information to include (optional).

End of Report
