



# Pitfalls and Positives

## e-Workflows, e-Signatures & e-Storage

### Transitioning to Digital



# Going GREEN!

How your department & organization can achieve huge reductions in paper use, streamline processes and increase productivity

- Business Analysis
- Project Management
- Technical Writing
- Training



## Audit Trail

- Does the new methodology comply with your audit requirements?

## Customization

- Can your agency's logo be incorporated with the new software interface?
- Will email notifications come from your agency's email or the vendor's email?

## Cyber Security

- This is generally a top priority for IT staff when selecting new software!
- Documents need to remain safe in storage and while traveling the internet gathering signatures, etc.

## Legal

- Will the new solution meet or exceed all legal requirements?

## Cost

- Have you considered initial costs - licenses, customization, training, implementation?
- Will there be ongoing licensing fees and are fees charged per document, file size, by signature or does the solution offer unlimited use?

## Implementation

- Will someone in your agency be responsible for training initially?
- How much will this process interrupt your business operations?

## Maintenance

- Who will train new hires or help with trouble shooting?
- Who will manage licenses?

## Storage

- Will the storage be on site within an agency owned server?
- If the software is cloud based, what is the vendor's retention policy and who owns the data?

# Stage 1 – Business Analysis

Look at the processes currently in place and consider what it will take to streamline the way you conduct business

- Other departments you may need to involve:
  - IT Department
  - Legal
  - Purchasing



# Planning

Once your Agency decides on a software solution, you need to understand

- All the steps necessary for implementation
- Who will be responsible for what actions
- How to organize each step to assure completion and quality control



Your Department

IT Department

Who Decides?

Internal/External  
Auditors

Legal Department



## What We Do Best!

- Nobody knows your processes better than the people who perform them every day
- Your team understands where the bottleneck happens in daily productivity
- Empower team members by asking them to suggest ways to streamline processes



# Computer Experts

- SECURITY - Your IT partner will assist in determining security requirements for the types of data you store
  - Banking Information (A/P)
  - Credit Card Information (A/R)
  - Social Security Numbers
  - Medical Data (leave requests)
- Assuring solutions work with existing hardware
- Customization
- Implementation & future troubleshooting

# Cyber Security



Your IT team can help you understand what is and what is not secure in cyberspace depending on the software you utilize.

- Who are you giving access?
- What level of access are you granting?
  - (edit, read w/ download, view only)
- Are there documents you should not store on the cloud (depending on the SaaS)?

# Follow the Rules

Your Legal team can help you understand what laws, codes, policies and guidelines you must follow.

- Is your Department/Agency subject to specific guidelines (HIPPA, FTA, RTA, etc.) in addition to local, state and federal laws?
- How does this impact the ways you do business?



# Is this acceptable?

- When planning a new records management system it is a great idea to involve internal and/or external auditors
- Find out what they will be looking for in the event of an audit
- Assure the new plan complies with the auditor's guidelines

**APPROVED**

# CHALLENGE

Migrate over 160 GB of data from a local server to a cloud-based SaaS

- Before the migration, re-name >240,000 files, folders and sub-folders
- Create more than 3,000 Document Sets
  - Gather metadata
  - Create individual folders
  - Enter metadata on each record



# eRecords

- Transitioning from paper to electronic records can simplify searches and de-clutter spaces
- This is an opportunity to reorganize all your records in a standardized manner
- It's a lot of work up front, but it saves time and effort going forward



# Where will it all go?

- Creating a new structure for eRecords needs to be well thought out to ease the transition for the Project Manager and the end users
- The old way of storing records may not work with the new software
- Data Mapping is a critical part of records migration
- Once you understand how your new software works, creating a clear map will:
  - Make migration a much smoother process
  - Assist your team with locating old records
  - Help everyone understand how to properly store new documents



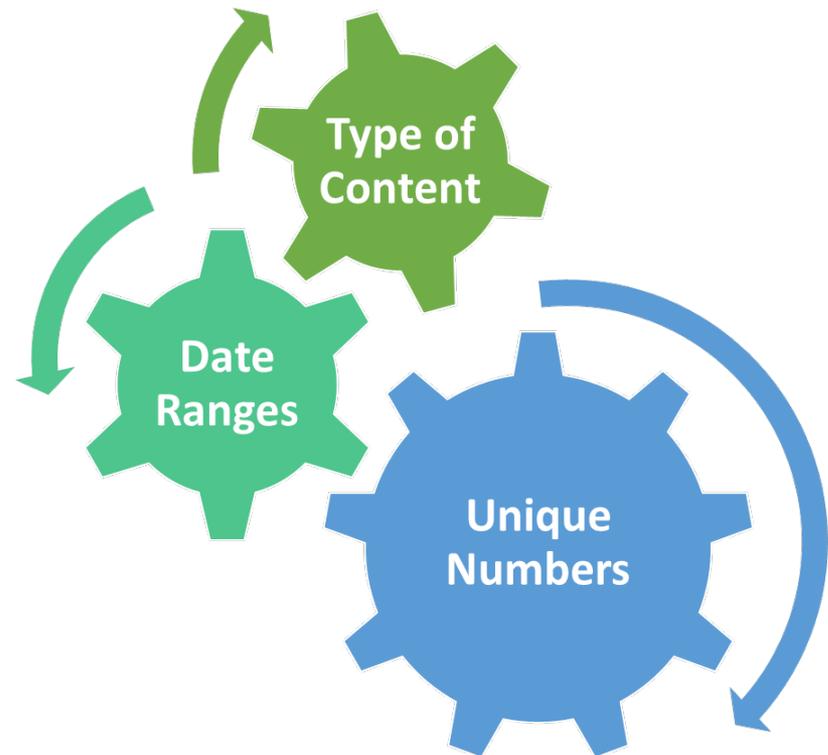


## Stage 2 – Project Management

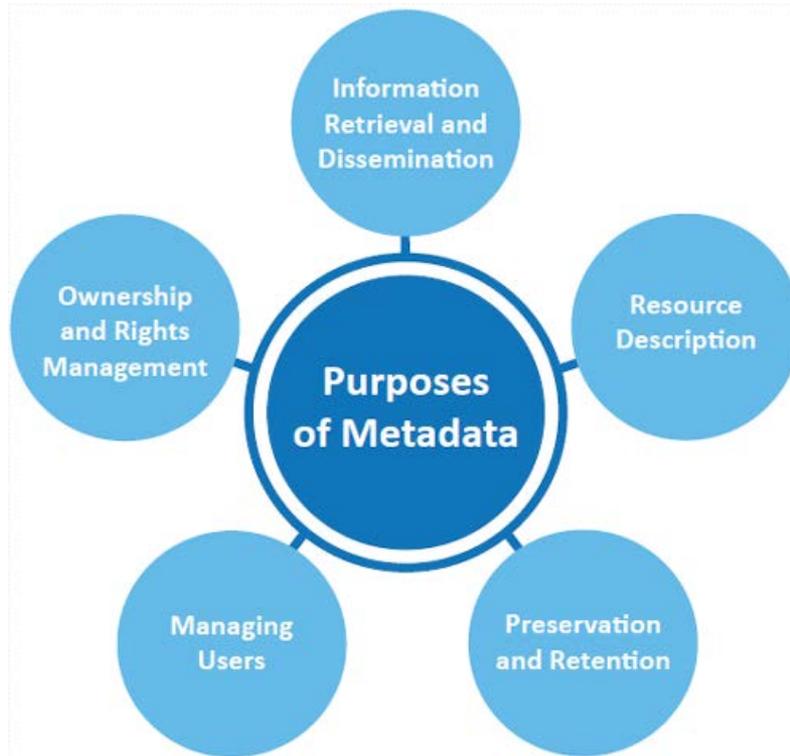
- Understand the full scope and have clear project goals
- Set realistic timeframes, include critical milestones and remain flexible
- Effective communication with everyone involved is key
- Risk management should start before the project begins
- Have dedicated project team members and tap into their strengths

# What Is Metadata?

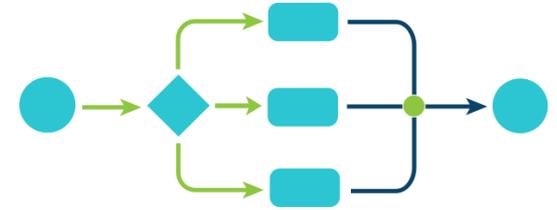
- A powerful part of optimizing a search engine
- Captures unique identifying Information
- Becomes part of the official record



# Metadata – What to consider



- How will people most likely look things up?
- What categories of data are unique to each specific file and used across your data?
- How can you structure your metadata?
- Remember, it becomes part of the record for retention and discovery in PIR's.



# Data Mapping

- Complex Data Mapping software is available
- Simple Data Mapping may not require additional software
  - Creates a high-level overview of how and where your data will be stored
  - Should include who will have access and their permission level
  - Providing a brief description of the contents will give your team an 'at a glance' quick reference

<https://samplesite.sharepoint.com/sites/XYZ/>

## LINKS

**External Calendar**  
(ALL-VIEW; PRC EDIT)  
Who's Out Today

**Purchasing Department (Extranet)**  
(ALL VIEW; PRC ONLY EDIT)

**SharePoint FTP (PUBLIC-VIEW ONLY)**  
Public Documents link, Purchasing Department folder, create subfolders & Get a link, "View link - No sign-in required"

**Enterprise Projects (PRC VIEW)**  
Content managed by Enterprise Team

**EVP Admin Area (PRC VIEW)**  
Content managed by HR Team

**Authorized List - A/P Vendor Requests (ALL VIEW, specific users edit)**

# DOCUMENTS LIBRARY

## SHARED LIBRARIES

**Purchasing Department Shared Documents (ALL Agency READ; PRC ONLY EDIT)**

**Public Contracts & Solicitations (ALL Agency - EDIT) .pdf copies**

- Entire Contract
- Related Attachments
- Related Modifications
- Notice of Award
- Notice to Proceed
- Entire Solicitation
- Related Amendments

**SP-Admin-Lib (ALL - VIEW ONLY) .pdf search tips**

## PURCHASING ONLY

**Purchasing Only Documents (PRC ONLY VIEW/EDIT)**

- AX
- Board of Directors
- C&P MGR DOCS
- Federal Draw Verification
- FTA
- In-Kind Services

**A/P Vendor Library (VIEW & EDIT Restricted to site owners)**

**Boilerplates (PRC VIEW ONLY; EDIT Restricted to site owners)**

- Boilerplates
- Policy & Procedure
- Forms

**Contract (PRC ONLY EDIT/VIEW)**

- FY 2000-Current
- DOC SETS - metadata

**Evaluations (PRC ONLY EDIT/VIEW; specific permission to individual evaluators)**

- Folders for Evaluators
- Folders for specific project being evaluated

**Micro & Small Team (PRC ONLY EDIT/VIEW)**

**Finance Audit Library (PRC ONLY VIEW/EDIT)**

Audit files - Need to confirm retention with DRC for Audit

**Research Library (PRC ONLY EDIT)**

- Word version of published solicitations
- Cost analysis spreadsheet we generate based on all bids/offers
- Should **NOT** include any confidential or proprietary vendor documentation.

**Solicitations (PRC ONLY EDIT/VIEW)**

- Emergency
- EOI
- IFB
- IGPA
- RFP
- RFQ
- SoleSource
- SOQ

**STAFF Only (PRC ONLY VIEW/EDIT)**

- Contact Lists
- Signup Sheets
- Training Materials
- Warrants
- Folders for Each current member of Procurement
- MEETINGS
- PAST Employees

**Task Order Tracker (PRC ONLY VIEW/EDIT)**

- Folders with excel spreadsheet trackers for task order contracts with multiple awards. Keeps tracker in one location with links in each Contract Library Doc Set

**Investment Recovery (PRC ONLY EDIT/VIEW)**

- \*3yr Retention

**Investment Recovery Tracker - Inventory Tracker - Vehicles**

**Workflow Library (PRC EDIT; specific permission to individual reviewers)**

Use for TEMPORARY storage of back-up documents until workflow completed

**Hummingbird Migrated Docs (PRC ONLY VIEW; EDIT Restricted to Migration Team)**

# Naming Conventions

- There is help available for renaming tens (or hundreds) of thousands of files & folders
- There are software solutions available to process bulk re-naming and character restrictions
- You do not have to touch every record individually once you create a standard naming convention



## Will your current naming convention work in your new system?

- Create a naming convention for use across all files/folders
- Create a spreadsheet/list to share with all parties who access your files
  - Keep it to the basic recurring words, don't try to abbreviate unique words
  - Involve your team, they'll be using this daily and it helps if it's logical to them as well

**CHALLENGE** – my list was 584 words before the renaming process began for this project



# Standardize the Naming Convention

	A	B	C	D
	<b>PLEASE NOTE: If you do not see a word on the list that is recurring in our filing system: 1. Add the word to column A; 2. provide a suggested abbreviation in column C; 3. HIGHLIGHT the row and; 4. Contact Julia Caruso to review/update the spreadsheet with the approved abbreviation</b>			
1	<b>abbreviation</b>			
2	Sample Current Naming Convention	Sample Abbreviated Name	Sample Full Name	Notations
3	Doc #, hyphen, (? Max # Characters to abbreviate folder name)	999123-FcltyPrgm	Facility Programming Study and Master Plan	
4				
5	<b>Current NAME</b>	<b>Abbreviation</b>	<b>Suggested Abbreviations</b>	<b>Comments</b>
6	#, ' ( )	(LEAVE BLANK/remove symbols)		
7	&	n		
8	_	-		
9	Acceptance Period Extension	AccptPeriodExt		
10	Accessibility	Accessblty		
11	Accessibility for Maintenance Building	Accessblty4MaintBldg		
12	Accomplishment	Accmplshmnt		
13	Account (AcCnt)	Acct		
14	Acknowledgement	Ack		
15	Acknowledgement Completed	AckCmplt		
16	Additional	Addl		
17	Address	Addr	Adr	
18	Adjustment	Adjmt	Adjst	
19	Administration	Admin		
20	Administrator	Admin		
21	Advanced Notice	ANTO		
22	Advertisement	Ad		
23	Advertising	Advtg		
24	Affidavit	Afdvt		
25	Agenda	Agnd		
26	Agenda - Pre-Bid Conference	AgndPreBidConf		
27	Agenda Performance Meeting	AgndPerfMtg		
28	Agenda Pre-Proposal Conference	AgndPrePrpslConf		
29	Agreement	Agrmt		
30	Allocate or Allocated	Alloc		
31	Alternate	Alt		
32	Alternative	Altern		
33	Amendment #1; etc	Amd-1		
34	Amendments	Amd		
35	Amenities	Aments		

# eStorage Solutions

- Your new records management software will determine what software solutions you may be able to utilize
- Look for software that allows you to input your new naming convention
- If character limit is an issue (as with many cloud-based SaaS) there are programs available to automate removing spaces and special characters





# Software To Automate The Process

Research software to help with changing existing names to new naming convention, detect predetermined character length, alert if exceeded, and remove unnecessary spaces and restricted characters.

- Software should help with ALL aspects of this process.
  - Are there character volume limitations in your new database?
  - Are there character (symbol) restrictions?
  - If it is web/cloud based, there are likely both!
- Software needs to be compatible with the specific software you will be using for eRecords, as well as your current system.
- Software should provide logs of changes made successfully or some sort of built in tracking mechanism.
- Ability to upload naming convention within software.

**Bulk Rename Utility**

File Actions Display Options Renaming Options Special Help

**Bulk Rename Utility**

This Panel

Name	New Name	Size
<b>SAMPLE ONLY</b> <b>FREEWARE - NOT FOR COMMERCIAL USE</b>		

**RegEx (1)**  R

Match   
Replace   
 Include Ext.

**Replace (3)**  R

Replace   
With   
 Match Case

**Remove (5)**  R

First n  Last n   
From  to   
Chars  Words   
Crop  Before   
 Digits  High  Trim  
 D/S  Accents  Chars  
 Sym. Lead Dots  Non

**Add (7)**  R

Prefix   
Insert   
at pos.   
Suffix   
 Word Space

**Auto Date (8)**  R

Mode   
Type   
Fmt   
Sep.  Seg.   
Custom   
 Cent. Off.

**Numbering (10)**  R

Mode  at   
Start  Incr.   
Pad  Sep.   
Break   Folder  
Type   
Roman Numerals

**Move/Copy Parts (6)**  R

**Append Folder Name (9)**  R

Name  Sep.  Levels

**Extension (11)**  R

**Filters (12)**  R

Mask   Folders  Hidden Name Len Min  Max   
 Match Case  RegEx  Files  Subfolders Path Len Min  Max   
Condition

**Copy/Move to Location (13)**  R

Path   
 Copy not Move

**Special (14)**

Change File Attributes Status: Not Set  
 Change File Timestamps Status: Not Set  
 Character Translations Status: Not Set  
 Javascript Renaming Status: Not Set

Bulk Rename Utility is **free for personal, non-commercial, home use**. For use in a commercial environment, a commercial license is required. [More Info](#)

0 Objects (0 Selected)

SharePrep - Prepare Files for SharePoint - A. and R.C., Inc.

File Tools Help

Select Directory Filter: \*.\* Refresh Display Rename Selected Entry Delete Selected Entry

Folders

- TEMPTEST
  - A SubFolder 3 blanks
  - A\_SubFolder\_2\_blanks
  - AA - This SubFolder ext...
  - ART IMG\_
  - Delete this Folder
  - FRPAGE36a6x
  - FRPAGE36a8qqasdfgtr
  - FRPAGEXX3a
  - Recur1a
  - Recur1a2
  - TestSpec
  - testspec2

Short Name	Long Name	Attr	Size	DateStamp
ASUBFO~2	A SubFolder 3 blanks	D		06/05/06 23:57
AA-THI~1	AA - This SubFolder ext...	D		04/10/06 13:14
ARTIMG~2	ART IMG_	D		03/05/08 19:46
A_SUBF~1	A_SubFolder_2_blanks	D		12/07/07 13:01
DELETE~1	Delete this Folder	D		12/15/07 22:12
FRPAGE~4	FRPAGE36a6x	D		05/13/07 14:51
FRPAGE~2	FRPAGE36a8qqasdfgtr	D		09/04/07 11:25
FRPAGE~3	FRPAGEXX3a	D		06/05/06 23:57
RECUR1A	Recur1a	D		09/08/10 19:59
RECURS~1	Recur1a2	D		09/08/10 19:48
AARON2A.T...	AARON2a.tyt		188	10/03/00 15:39
AASYSXZ2....	AASYSxz2.bt		188	10/03/00 15:39
AAXLL3B4.T...	aaxLL3b4.bt	h	188	10/03/00 15:39
COMODO~2....	comodoScan.tx5a		2564	01/26/10 23:00
LONGNA~1	LongNameToBeTruncat...		490	04/08/04 00:20

Set Options for Repair Functions Set Options for Logging Changes **Open Scan and Repair Window** Exit

Current Path - C:\TEMPTEST  
Short Path - C:\TEMPTEST

# Organization Is Key!

- How to not lose your files during and after migration
  - Consider purchasing an external hard drive to back-up all data as your first step
  - Select software that creates logs to track migration status
  - If logs can be created or exported to Excel, you can color code the results for ease of QA/QC



```

2:20:28 PM: System.OutOfMemoryException: Exception of type 'System.OutOfMemoryException' was thrown.
   at System.Net.ScatterGatherBuffers.AllocateMemoryChunk(Int32 newSize)
   at System.Net.ScatterGatherBuffers.Write(Byte[] buffer, Int32 offset, Int32 count)
   at System.Net.ConnectStream.InternalWrite(Boolean async, Byte[] buffer, Int32 offset, Int32 size, AsyncCallback callback, Object state)
   at System.Net.ConnectStream.Write(Byte[] buffer, Int32 offset, Int32 size)
   at Microsoft.SharePoint.Client.ChunkStreamBuilder.CopyStream(Stream src, Stream dest)
   at Microsoft.SharePoint.Client.ClientRequest.WriteMimeStream(ExecuteQueryMimeInfo mimeInfo, ChunkStringBuilder sb, Stream requestStream)
   at Microsoft.SharePoint.Client.ClientRequest.ExecuteQueryToServer(ChunkStringBuilder sb)
   at Microsoft.SharePoint.Client.ClientRequest.ExecuteQuery()
   at Microsoft.SharePoint.Client.ClientRuntimeContext.ExecuteQuery()
   at Microsoft.SharePoint.Client.ClientContext.ExecuteQuery()
   at BandR.SpComHelper.UploadFileToSharePoint(String spSiteUrl, String spSiteUsername, String spSitePwd, String spSiteDomain, Boolean isSpOnline, String filePath,
String spFolderUrl, Boolean overwrite, Nullable`1 dtCreated, Nullable`1 dtModified, Boolean& skipped, String& msg)

```

### NO ERROR DISCOVERED IN QA/QC 9/13/2016 - JWC

7/12/2016

```

1:03:02 PM: Microsoft.SharePoint.Client.ServerException: The request message is too big. The server does not allow messages larger than 262144000 bytes.
   at Microsoft.SharePoint.Client.ClientRequest.ProcessResponseStream(Stream responseStream)
   at Microsoft.SharePoint.Client.ClientRequest.ProcessResponse()
   at Microsoft.SharePoint.Client.ClientRequest.ExecuteQueryToServer(ChunkStringBuilder sb)
   at Microsoft.SharePoint.Client.ClientRequest.ExecuteQuery()
   at Microsoft.SharePoint.Client.ClientRuntimeContext.ExecuteQuery()
   at Microsoft.SharePoint.Client.ClientContext.ExecuteQuery()
   at BandR.SpComHelper.UploadFileToSharePoint(String spSiteUrl, String spSiteUsername, String spSitePwd, String spSiteDomain, Boolean isSpOnline, String filePath,
String spFolderUrl, Boolean overwrite, Nullable`1 dtCreated, Nullable`1 dtModified, Boolean& skipped, String& msg)

```

### MIGRATED "IMG-1130" AS INDIVIDUAL FILE 9/14/2016 - JWC

7/13/2016

```

7:42:54 PM: Microsoft.SharePoint.Client.IdcrlException: Identity Client Runtime Library (IDCRL) did not get a response from the Login
   at Microsoft.SharePoint.Client.Idcrl.IdcrlAuth.GetServiceToken(String securityXml, String serviceTarget, String servicePolicy)
   at Microsoft.SharePoint.Client.Idcrl.IdcrlAuth.GetServiceToken(String username, String password, String serviceTarget, String servicePolicy)
   at Microsoft.SharePoint.Client.Idcrl.SharePointOnlineAuthenticationProvider.GetAuthenticationCookie(Uri url, String username, SecureString password)
   at Microsoft.SharePoint.Client.SharePointOnlineCredentials.GetAuthenticationCookie(Uri url, Boolean refresh)
   at Microsoft.SharePoint.Client.ClientRuntimeContext.SetupRequestCredential(ClientRuntimeContext context, HttpWebRequest request)
   at Microsoft.SharePoint.Client.SPWebRequestExecutor.GetRequestStream()
   at Microsoft.SharePoint.Client.ClientContext.GetFormDigestInfoPrivate()
   at Microsoft.SharePoint.Client.ClientContext.EnsureFormDigest()
   at Microsoft.SharePoint.Client.ClientContext.ExecuteQuery()
   at BandR.SpComHelper.UploadFileToSharePoint(String spSiteUrl, String spSiteUsername, String spSitePwd, String spSiteDomain, Boolean isSpOnline, String filePath,
String spFolderUrl, Boolean overwrite, Nullable`1 dtCreated, Nullable`1 dtModified, Boolean& skipped, String& msg)

```

### MIGRATED "RE-New-Purch-Ord-135814" AS INDIVIDUAL FILE 9/14/2016 - JWC

9:20:35 PM: Could not find a part of the path 'O:\Micro-N-SmallTeamTools-Keep RENAME\Misc-Files'.

### FILE NOT FOUND DURING QA/QC 9/19/2016 - JWC

# Time Constraints

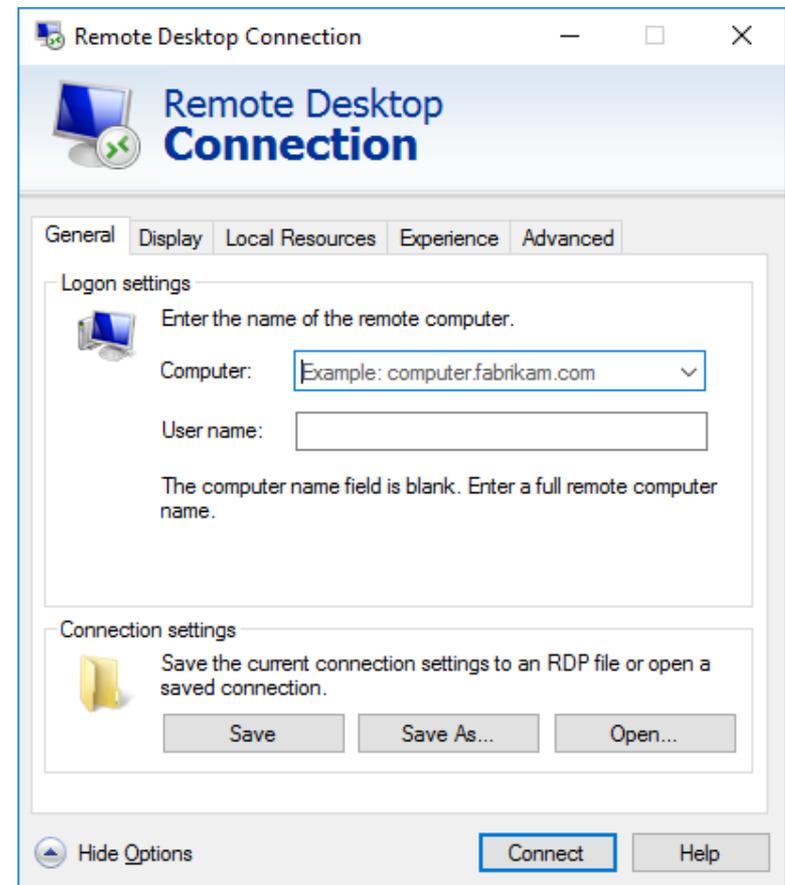
- The migration process will be delayed by many factors that are outside of your control:
  - Number of files
  - File sizes
  - Internet speed
  - Server speed
  - Your working PC's RAM speed



# Virtual Desktop

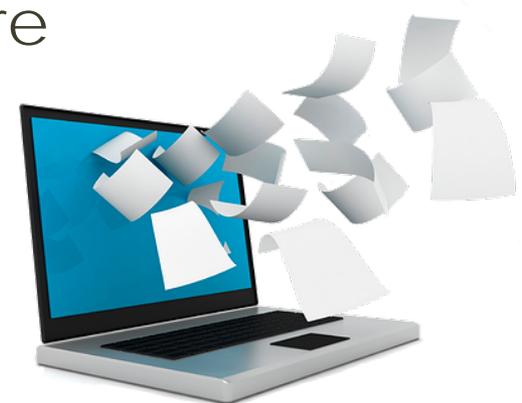
Allows you to migrate data from a server to a cloud-based SaaS simultaneously through multiple “desktops”

- Saves time
- Requires additional tracking



# Audits Trails!

- Going electronic creates a different type of audit trail
- Talk to your internal and/or external auditors
- Work with your legal team research what the legal requirements are specific to your organization



## Solutions for ALL aspects

- Select new records management solution.
- Choose additional tools for: Renaming, Migrating, Tracking, etc.

## Identify Metadata

- What unique content does your team most often use in searches?
- How can you group the data logically?

## Data Mapping

- Where will everything go?
- Who will have access and at what permission level?

## Create Naming Convention

- Do you have character limitations?
- Are any characters restricted?

## Create Tracking Mechanisms

- Remember this won't happen in one day.
- How will you track what is completed?

## Rename Files and Folders

- Everything must be renamed before you begin migration.

## Migrate Data

- Choose a starting point and begin moving your data section by section.
- Start with oldest records to minimize impact.

## Quality Control

- We can't assume it all worked as planned.
- Have tools in place to verify success and correct issues throughout the project.

# e-Signatures

- Choosing and utilizing eSignature software.
- Is a full encryption digital signature necessary for every document/transaction or can the audit trail be satisfied with an electronic signature and some simple back-up evidence?

**Digital Signatures**  
**vs.**  
**E-Signatures**



# US Code 15, Ch. 96, Electronic Signatures in Global and National Commerce

- Effective October 1, 2000, **In general**
  - Notwithstanding any statute, regulation, or other rule of law (other than this subchapter and subchapter II), with respect to any transaction in or affecting interstate or foreign commerce—
    - (1) a signature, contract, or other record relating to such transaction may not be denied legal effect, validity, or enforceability solely because it is in electronic form; and
    - (2) a contract relating to such transaction may not be denied legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation.

<http://uscode.house.gov/view.xhtml?path=/prelim@title15/chapter96&edition=prelim>



# What Type of Signature is Required?

- Internal documentation can often utilize simple electronic signatures with a little backup documentation to satisfy the audit trail
- External signatures often require additional levels of authentication; a digital signature

All digital signatures are electronic,  
but not all electronic signatures are digital



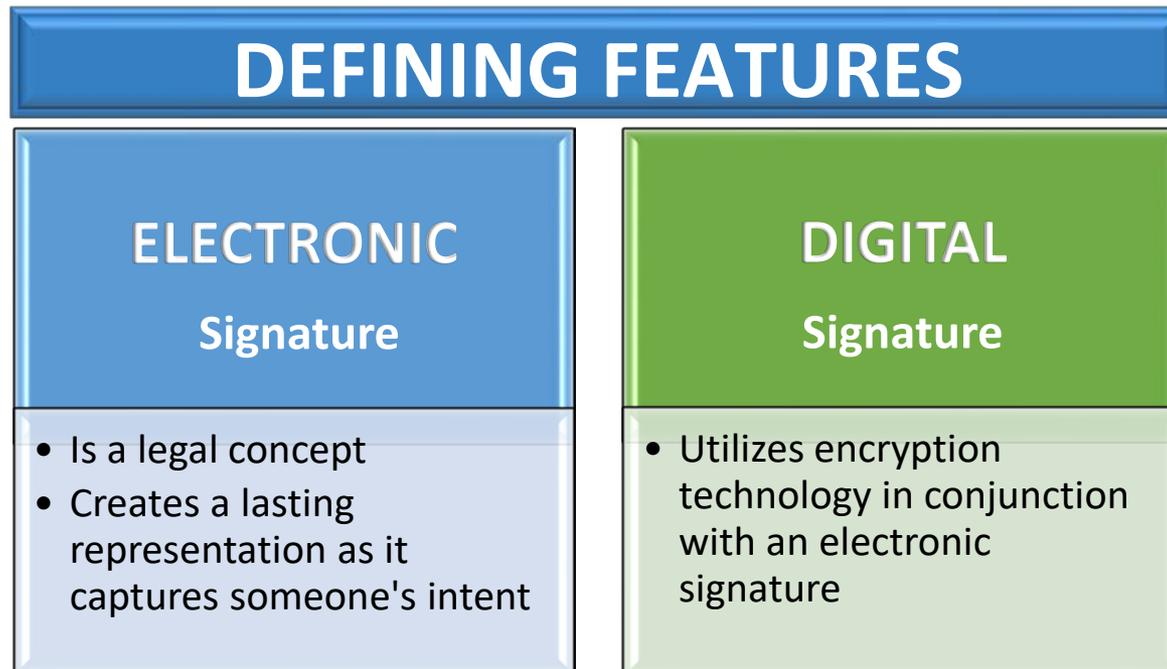
Electronic Signature



Digital Signature

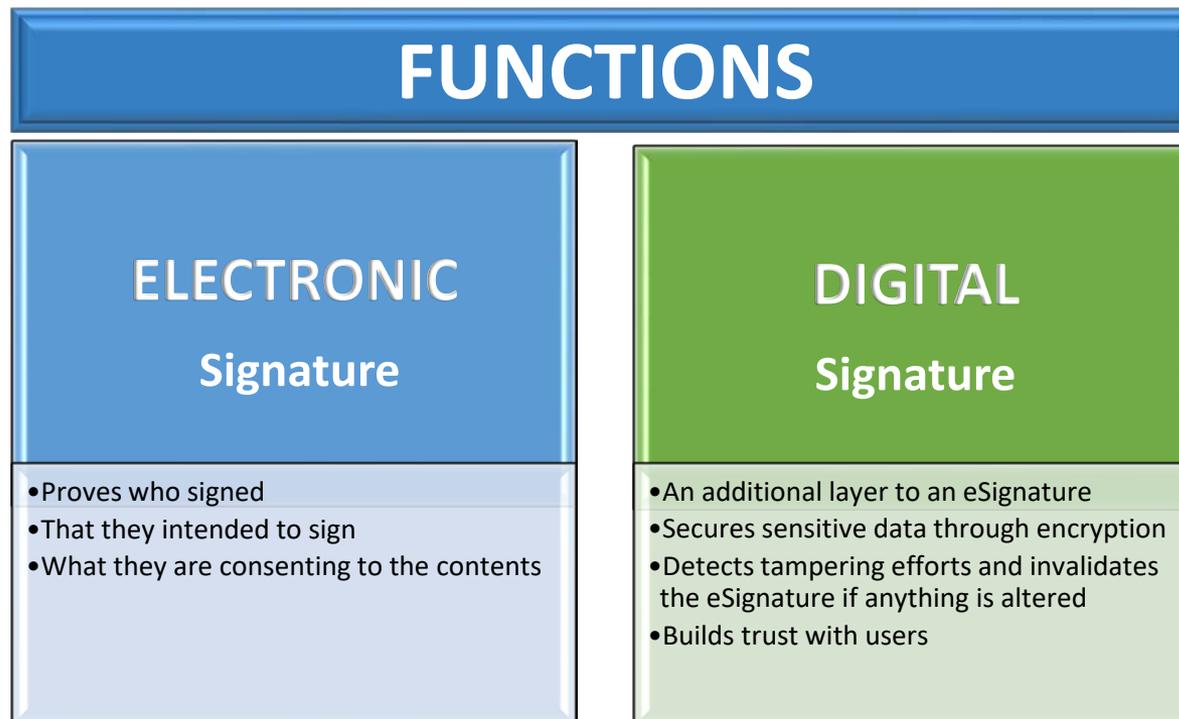
# What is the difference?

The terms “electronic signature” or “eSignature” and “digital signature” are often used interchangeably in conversation, but they carry distinct features and functions.



# You can't have digital without having electronic first

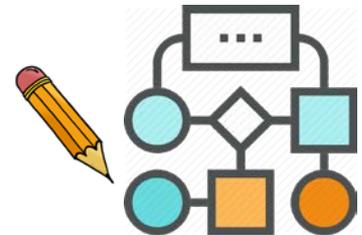
Think of digital signatures as authenticated electronic signatures

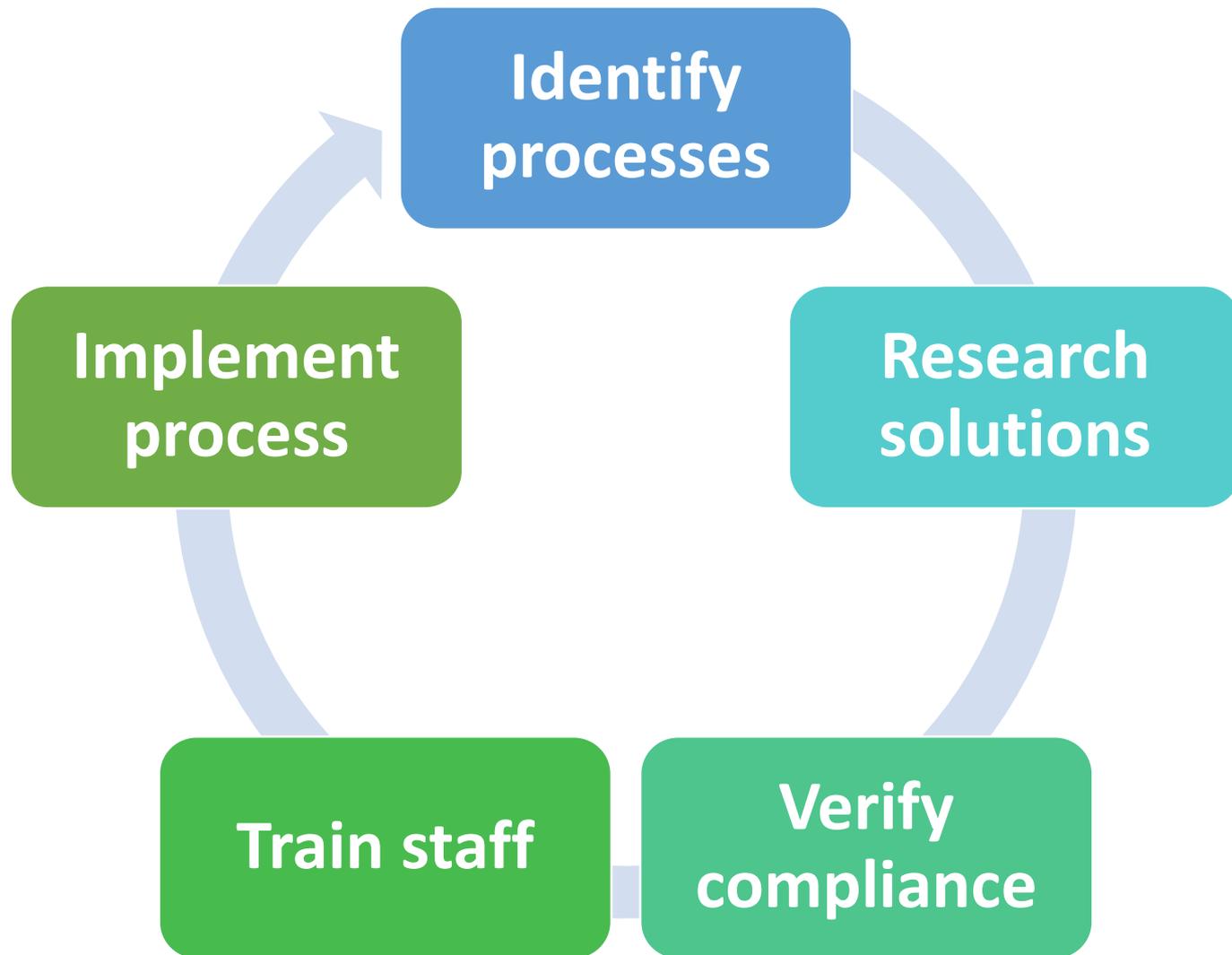




# eWorkflows

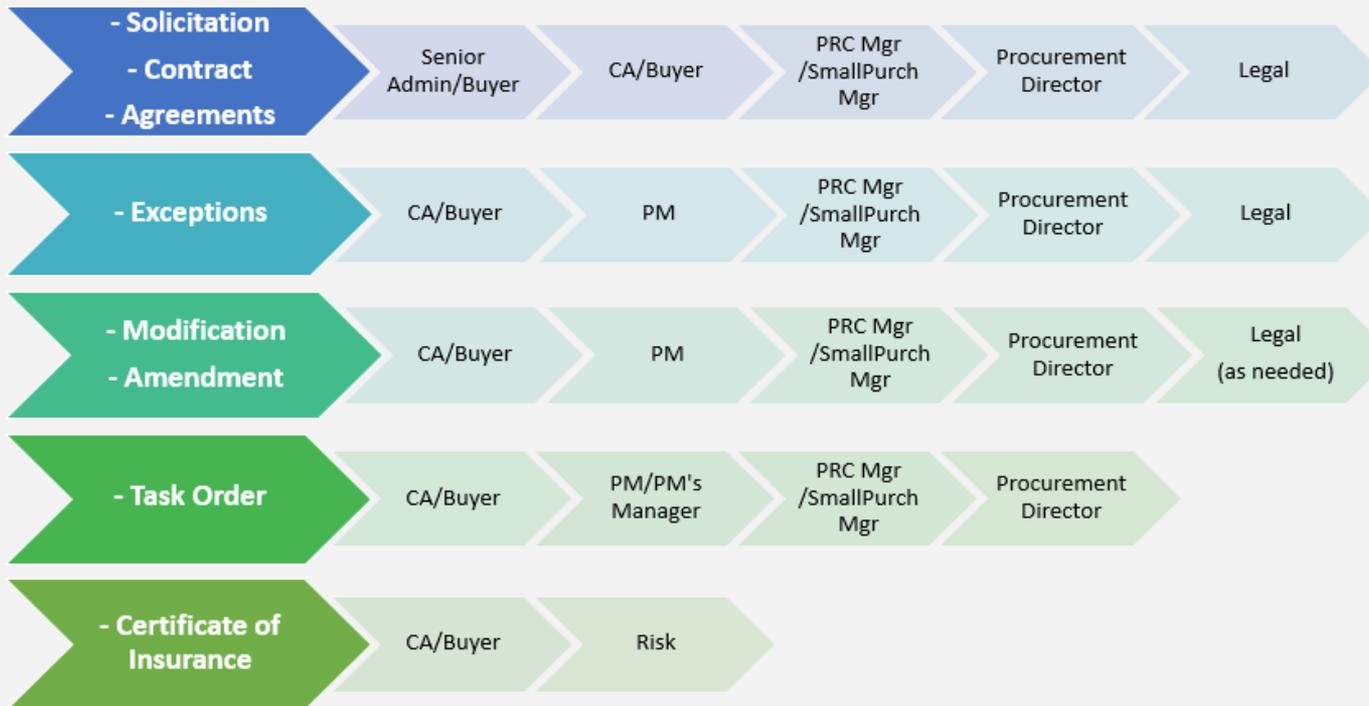
- Identify paper processes that can be transitioned to electronic
- Research available technologies that fit your needs
- Verify new process will maintain the integrity of your documentation for audit trails and legal compliances





# Identified Workflows

## SERIAL DISTRIBUTION WORKFLOWS:

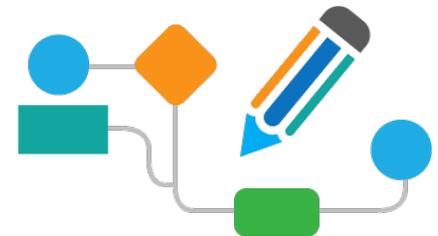


## PARALLEL DISTRIBUTION WORKFLOWS:



# Who Had It Last?

- One of the biggest advantages of electronic workflows is not having to physically track down who had your documents last and where they are now.
- The audit trail created by eWorkflows helps your organization see where there may be bottlenecks in process flow.



- Add or update approvers of Approval
- Cancel all Approval tasks
- Update active tasks of Approval

If an error occurs or if this workflow stops responding, you can end it.

- End this workflow.

#### Tasks

This workflow created the following tasks. You can also view them in [Tasks](#).

<input type="checkbox"/> Assigned To	Title	Due Date	Status	Related Content	Outcome
<input type="checkbox"/> Approver, Assigned	Please approve Test workflow		Not Started	<a href="#">Test workflow</a>	

#### Workflow History

The workflow recorded these events.

<input type="checkbox"/> Date Occurred	Event Type	<input type="checkbox"/> User ID	Description	Outcome
8/15/2019 10:50 AM	Workflow Initiated	<input type="checkbox"/> Caruso, Julia	Approval was started. Participants: Approver, Assigned Caruso, Julia	
8/15/2019 10:50 AM	Task Created	<input type="checkbox"/> Caruso, Julia	Task created for Approver, Assigned Due by: None	

## Creates a date/time stamped record of:

- Who is assigned a task
- What order tasks need to be complete
- When approvals are assigned and completed
- Where the documentation is currently

# Glitch In The Matrix

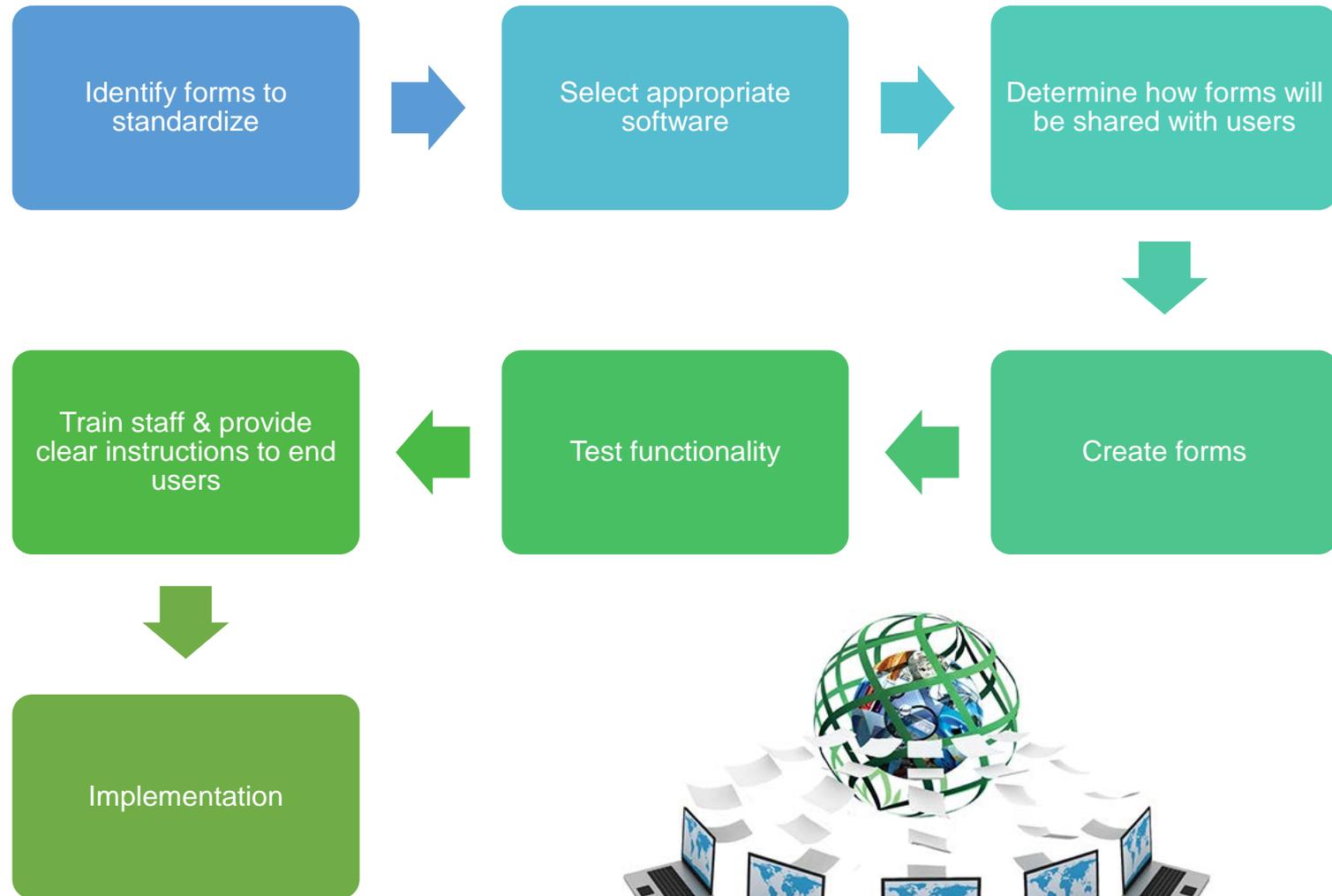
- Who will troubleshoot issues to keep work flowing smoothly?
- There will be occasional glitches, operator errors, and potentially software issues.
- Comprehensive training helps reduce errors.
- Plan for ongoing training for new hires and refresh training, as needed.





# Fillable Forms

- Do you use Excel, Word, Adobe, or other software?
- Are your forms standardized?
  - If not, can they be?
- Are answers limited to specific dropdown items or fill in the blank data fields?
- Can your software protect the rest of the document?
- Is it compatible with your eWorkflow software?



# Procurement Solutions

Software is available to digitally streamline the entire procurement process, including management of:

- Vendor database
- Bids/Proposals from issuance to award
- Contracts
- Insurance certificates
- Evaluation Process





# Electronic Submissions

- Small procurement bids are now accepted fully electronically, whereas this used to require multiple hard copies
- Generally, large proposals used to require one (1) original **and** six (6) to eight (8) hard copies of every submission (potentially several Volumes)
- Under new eWorkflow process, proposers now submit:
  - One (1) original
  - Two (2) hard copies
  - One (1) electronic copy on CD or external hard drive of all Volumes

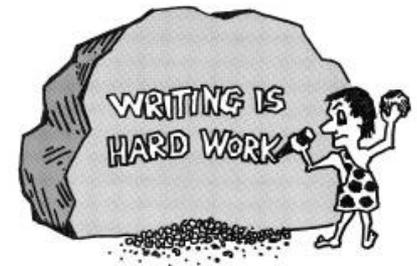
# Evaluation eWorkflow

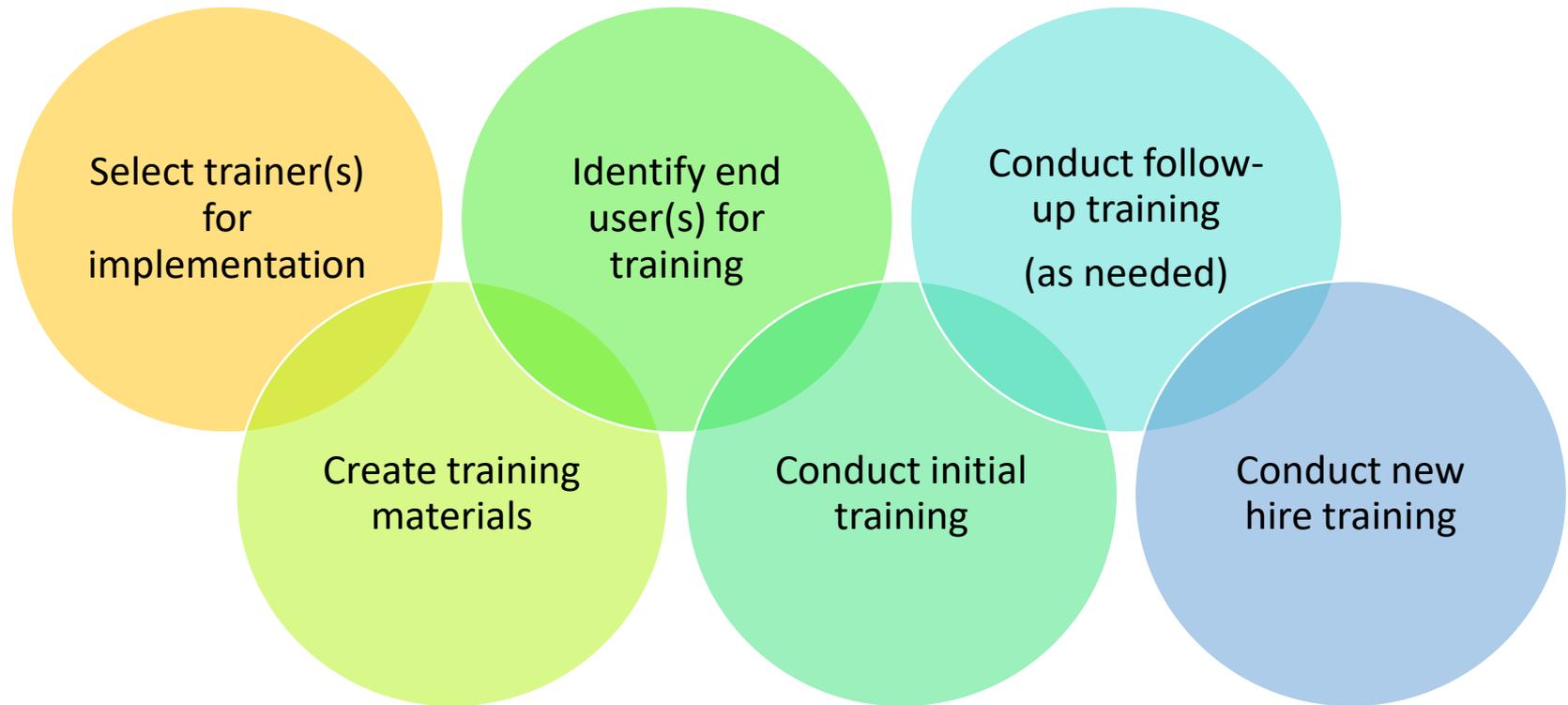
- Large procurements transitioned to an electronic workflow evaluation process.
- Each evaluator is given access to an online folder containing all proposals received and a separate folder online with their evaluation forms for completion.
- No more carrying volumes of heavy binders around for review!



## Stage 3 - Technical Writing

- Who will create desktop procedures?
- Will they generate QuickStart Guides?
- Are there different types of users who will require different training and procedures?
  - Example: requestors and approvers
- Who will update desktop procedures as processes evolve?





## Stage 4 - Training

- Who will train everyone?
- Who will be there for future problem solving, refresher and new hire training?
- We all learn at different rates!



# Empowering Your Team

- Training personnel is a key component of succeeding when implementing new processes
- If people don't understand how to use new systems, it can be overwhelming instead of beneficial



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