

Forms
SERVICE ADVISORY BOARD
July 2020

Purpose:

The Forms Service Advisory Board advises the service owners (AVP Business Affairs/Controller and VPFA) on matters related to the Business Affairs Office (BAO) Forms electronic signature service, and advises the Domain Committees, CIO, and ITSC on matters related to IT policies, priorities and performance.

About the Service:

Forms software was developed by BAO to transform paper data collection, routing, and signing processes to more efficient electronic processes. Forms.uoregon.edu is hosted by Information Services as part of the central Drupal Hosting service. Forms are routed by email and signed using Duck ID credentials. All signed documents are generated in PDF format in the Drupal file system and will be migrated to and archived in the UO Enterprise Content Management System (ECMS).

Software Components:

1. Drupal forms (configurable forms engine)
2. Shibboleth Integration (electronic signature)
3. Internal Routing to UO Mail
4. External routing to private email accounts
5. Archival On Base ECMS.

Owner: AVP Business Affairs/ Controller

Funding: Business Affairs

Begin Date: June 2014

System Integrations:

1. SSO
2. Adobe
3. On Base ECMS

Scope – Major Activities:

The Forms Service Advisory Board provides the system owner, Vice President for Finance and Administration (VPFA), and CIO with advice and recommendations as follows:

- Service Integrations: Evaluate and provide recommendations related to enterprise system integration, including recommended priority and associated funding and resource requests.
- Service Lifecycle: Provide recommendations related to the priority, scope, funding, benefits, and resource needs of new service offerings or elimination of existing services.

The Forms Service Advisory Board provides the service owners with advice and recommendations as follows:

- Change/enhancement of the Forms service.
- Problem resolution.
- Changes in business practice.
- Service Lifecycle: Provides recommendations for new service offerings or the elimination of existing services.

Not in Scope:

- Involvement in routine service operations, except as required in a member's other role(s)
- Implementation of initiatives or projects, except as required in a member's other role(s)

Procedural Guidelines:

- Meetings: The eCommerce Service Advisory Board is expected to meet at least semi-annually.

- Recommendations and Reports: The Forms Service Advisory Board will ensure that stakeholders' perspectives and needs are considered and used in decision-making, when feasible. Discussion to obtain consensus on recommendations will be the prevailing procedure used at meetings. If consensus cannot be obtained, a minority report may be prepared. As needed, subgroups may be convened to address specific assignments made by the chairs or service owners. Subgroup recommendations and reports will be submitted in writing to the Forms Service Advisory Board. Documents will include both suggested action and justification for suggestions.
- Minutes: Minutes of each meeting will be kept. Meeting notes will be available to stakeholders via mutually agreeable collaboration tools.
- Amendment of Charge: Amendments to the charge will be approved by the service owner (AVP Business Affairs), and VPFA.

Membership:

Members are appointed by the committee chair(s)/system owners and serve at the discretion of the VPFA.

All members must have a broad campus perspective and demonstrated interest in the strategic application of technology in support of the university's mission.

Members should have experience providing or consuming resources related to forms electronic signature services.

Standing membership will include:

Co Chairs

- Business Affairs, Mark McCulloch and Joseph Muennich

Service Delivery Representatives

- Business Affairs, Mark McCulloch, Stephen Mosley, Jody Bleisch, and Joseph Muennich
- Information Services: Kelly Gossett

User Represented Units

- Clark Honors College
- College of Design Shared Services

- Human Resources
- Office of Research and Innovation
- Public Records Office
- Sponsored Projects Services
- Transportation Services

Subject matter experts will be invited to meetings as needed to provide information, discuss issues, and/or assist in setting priorities.