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Diminishing eSignature Costs While Maintaining User Experience at KSU

Presented by
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Background Information

- **33,000+ Enrolled Fall 2022**
  - 28,000+ Main Campus
  - 93% of students receive some form of Financial Assistance
- **270,000+ Alumni**
- **9 Campuses**
- **38 Departments using DocuSign**

- **DocuSign as the only solution for electronic signatures**

Challenges

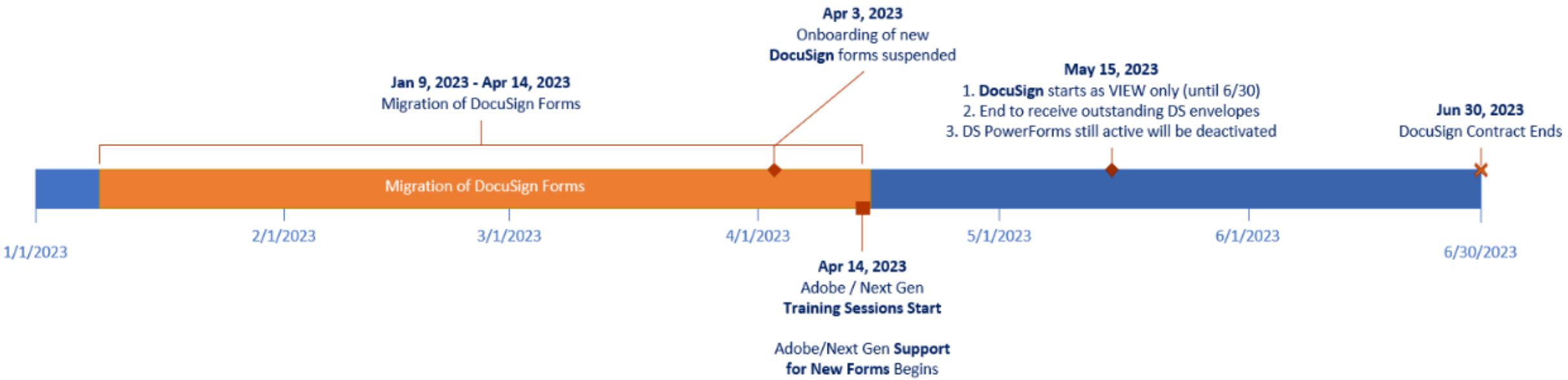
- **DocuSign Contract Renewal Cost**
  - Increasing year to year
  - Poor support
- **Request for Purchase**
  - Increased cost provided opportunity for a change
- **Opportunities for department growth**
  - Increase efficiencies as turn-over due to Covid increased
  - Promote automatic indexing with our Document Management System

Solutions

- **RFP – Workflow and/or e-Signature**

DOCUSIGN MIGRATION PROJECT TIMELINE

1/24/2023



White Glove Approach

- **Migration Team Responsibilities**
  - Set up existing, active forms in Adobe Acrobat Sign or Dynamic Forms
  - Meet with department when forms are ready for testing
  - SharePoint Site with updates
- **Department Responsibilities**
  - Review current active DocuSign templates:
  - Fill out and return the Migration Prep Questionnaire
  - Start preparing for updates that may be needed for your webpages, user guides, URLs, etc.
  - Test out forms in new platform when ready and sign-off
  - Attend training session(s)

Adobe and Dynamic Forms Decision Cloud

- Electronic Signatures
- Multiple Signatures
- Conditional Routing
- Calculated fields / Conditional fields / Role based field access
- Heavy data collection with searching, filtering,
- Exporting capabilities
- Internal Kent state signatures/approvals
- (AD) Profile Prefill
- Low usage / Frequency
- Quick, simple forms*
- External Signers
- AppXtender

Adobe and Dynamic Forms Decision Cloud

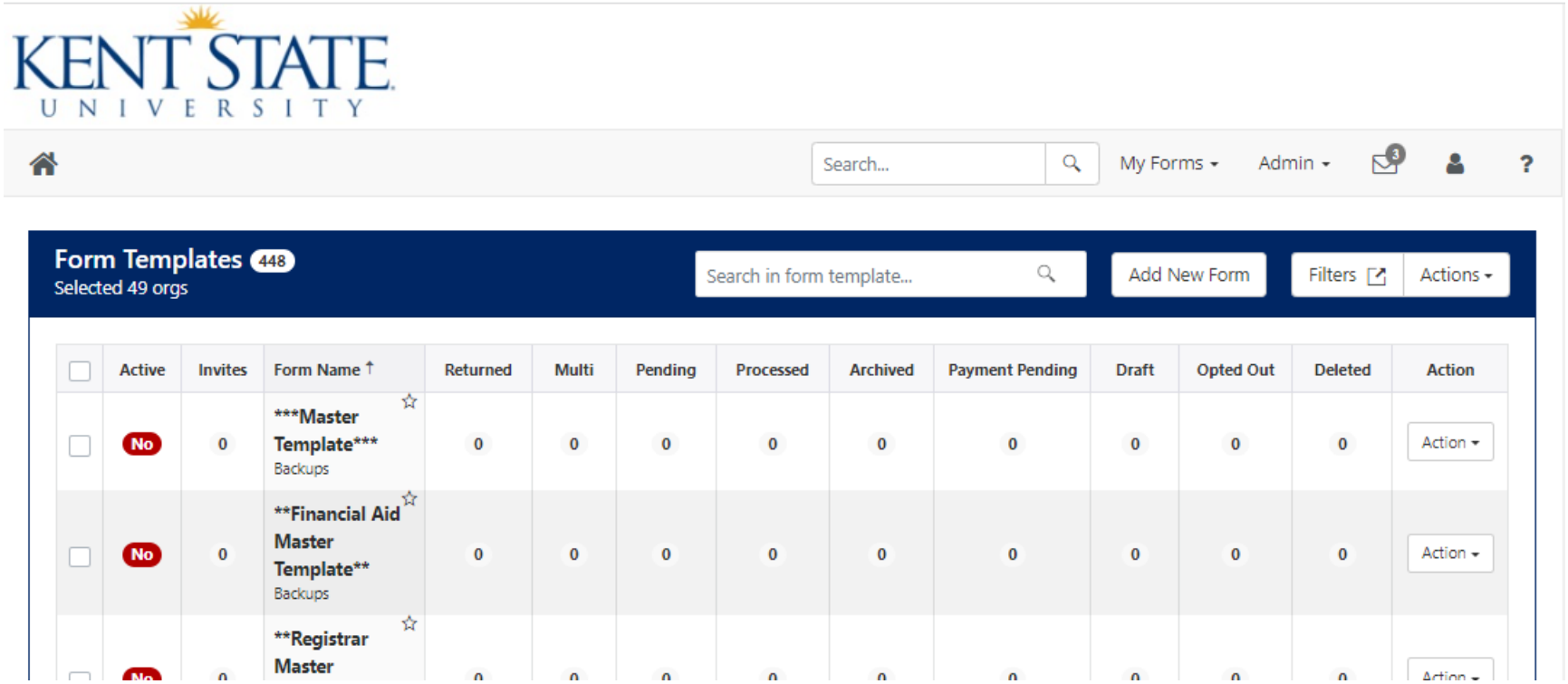
- Banner data integration
- Learning Curve
- High Turnover of Authors
- User Groups (sent to dept and one person takes action)
- PDF Forms that can't be changed
- Periodic Changes to Forms
- Bulk Upload
- Form Ownership
- PowerForm equivalent
- Group Access to Manage/Take action on form
- Chosen Name

Other Considerations

- Department preference
- Availability for testing
- What the form was really capturing
- All parts of their process

https://co-libry.com/features/data-capturing/

Demo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Archived
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Draft
Opted Out
Deleted
Action
No
Master Template
Backups
Financial Aid Master Template
Backups
**Registrar Master

Statistics

- **38 Departments Using DocuSign**
- **497 Templates in DocuSign**
- **339 Templates Identified to Migrate**
  - Reduced further by combining forms due to Dynamic Forms conditional routing
- **53 Staff members attended Training Session**
- **~33% Savings Overall**
  - Future state – even more savings

Email us at: DI_Admin@kent.edu

Testimonial

Bursars 11:58 AM

Hi DocuSign Migration Onboarding and Testing. I don't need anything...I just want to say how much more I love Dynamic forms than DocuSign and I have been having far more fun than one should have at work this morning figuring out ways to customize notifications and adding rules. I am going to hop into the meeting this afternoon to ask some questions about migration. Thank you all for making this process so much less painful than it could have been.

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Thank You.