

Working Title: Associate Director, Document Management

Reports to: Director, Development Records

Target Hiring Range: \$50,000 - \$60,000

Summary of Duties:

Manages and supervises day-to-day operations and long-term planning for the University Development Document Management office; administers and maintains the Document Management System (OnBase); develops and implements processes and procedures required to assure the efficient and accurate retrieval of information; recommends budget needs for on-going operation costs and special purchases of equipment; hires, evaluates and trains staff in document imaging, indexing, and retrieval.

Sets direction and strategy for the document management system (DMS) – makes decisions and sets the roadmap for the DMS on behalf of University Development. Works closely with the Development IT office to plan and implement software upgrades, training, conversion projects, configuration, system security and integration of the advancement system with the document management system.

Maintains a policy and procedure manual; develops and administers University Development Document Retention and Destruction policy and assures adherence to the University's Document Retention and Destruction schedules; operates and maintains scanners, microfilm reader/printer and any equipment required for creation of, and retrieval from imaging and microfilm; fills requests to gather and provide information on alumni, donors, friends of the university, and other permanent dept records and assures that all customers' needs are met and customer service standards are met or exceeded.

Duties/PCTS:

30% Manages workflow and processes within Development Document Management office for receiving, prepping, scanning, indexing, and retrieval of documents. Provides leadership on process analysis, process improvement, and problem solving. Ensures continued operations of DMS, microfilm and other office equipment. Troubleshoots equipment malfunctions and ensures availability of necessary materials to guarantee office's continued operations. Works with vendors to investigate new equipment, maintain and repair existing equipment, and manage off-site storage. Sorts, preps, scans and indexes incoming documents when needed.

40% Plans and implements software upgrades in conjunction with IT staff, performs system testing, coordinates end-user training and delivers end-user training as needed. Partners with IT staff on conversion projects, system design, configuration, and security. Works closely with the Advancement System Upgrade project team on integration of advancement system with the document management system.

20% Supervises, hires and trains Document Management staff, temporary staff and student staff. Sets priorities, assigns work and evaluates staff. Maintains individual and department performance statistics.

10% Develops and maintains a policy and procedure manual. Develops and administers Document Retention and Destruction policy. Maintains confidentiality of information and interprets and applies appropriate rules and regulations such as the OSU Institutional Data Policy, FERPA, and HIPAA. Supervises the migration of hard copy documents and microfilm into the imaging system. Attends imaging and records management seminars and pursues other sources of information for the enhanced operation of the office; keeps Director informed of technologies and other potential resources identified.

Supervisory Responsibilities:

0 of unclassified staff

3 classified staff

1 student

Education:

Required Experience: bachelor's degree, certification or equivalent combination of education and experience in business, information management, information systems, project management, document management, or knowledge management.

Desired Experience: 3-5 years supervisory and management experience. Experience with document imaging software (Hyland Software's OnBase a plus). Knowledge of records management, document management, indexing, microfilm. Knowledge of image scanning equipment (scanners, microfilm reader/printers). Knowledge of public records law. Experience with Windows Officesuite and web browsers. Ability to sort and analyze data. Project management and process improvement skills. Ability to analyze and resolve problems. Excellent organizational and written/oral/interpersonal communication skills.