



eForms and Workflow Automation Tool

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Presentation Background Info



Attendees – President and Senior Staff

Organizational Change –

- New VP, Finance – July 1, 2015
- New VP, Human Resources – May 1, 2016
- New President – July 1, 2019
- New Provost – January 1, 2020

What this means –

- Lots of new perspectives
 - Lots of new expectations
 - Lots of questions
 - Lots of change
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Problem Statement



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What are we waiting for!?!?!?



How did we get here?

- A lack of institutional funding processes, stemming from the financial downturn experienced in 2010, have created a scenario where departments and IT are left to address this issue on a case-by-case basis



What does that mean?

Current Form Iterations	Pros	Cons
Paper forms - https://www.hws.edu/offices/forms.aspx	Infinitely flexible to support organic processes	<ul style="list-style-type: none">- Inefficient- Lacks transparency- Costly to manage- Manual updates to transactional systems
Homegrown applications (OPRA, Student Employment Authorization, etc)	Infinitely flexible to support organic processes	<ul style="list-style-type: none">- Too dependent on IT development resource- Not a financially sustainable model- Manual updates to transactional systems
Department Solutions (SLATE, Maxient, TK20, TerraDotta, etc)	<ul style="list-style-type: none">- Meets department needs- Efficient- Transparent	<ul style="list-style-type: none">- Redundant functionality- Redundant cost- Not able to meet campus needs



Desired State

- STOP PASSING PAPER AROUND!!!

- An institutional solution providing anywhere, anytime access to and management of institutional requests

For your consideration



- This is NOT a ‘Google Forms’ type of project
- Finding the right solution to this problem will require the following –
 - Institutional sponsorship, financial backing and project participation
 - Recognizing these critical needs
 - Easy form generation ...without IT
 - Complex workflow automation ...without IT
 - Centralized request management for administrative and academic departments
 - Push button updates to transactional systems, when necessary

What would the right solution look like...



- for General Users –
 - Public or authenticated electronic forms that could be completed from computer or phone
 - Forms would support attachments and allow for e-Signature
 - Users would have visibility to submission/workflow status

What would the right solution look like...



- for Departmental Developers -
 - An easy-to-use interface to develop/publish forms
 - Ability to create simple and complex workflows
 - Ability to review/approve/deny submissions
 - Access to reporting and metrics
 - Access to IT Services consultative resources when necessary

What would the right solution look like...



- for IT Services -
 - Easy integration to HWS SSO/MFA authentication platform
 - Access to form submission data for integration needs
 - Ability to manage granular access to forms/data/reports
 - Ability to enforce institutional data governance/compliance rules

Proposed Project Timeline



- May – June 2020 –
 - Formulate campus team to solidify requirements
 - Registrar
 - Human Resources
 - Finance
 - Provost's Office/Academic
 - Review product demos and select a vendor
- July – August 2020 – develop pilot forms/processes
 - Human Resources – Student Employment Authorization and Employee Action forms
 - Registrar – New Course Request and Major Declaration forms
 - Finance – Funding Request and Direct Deposit forms
 - Provost/Academic – Honors Program and Academic Dishonesty forms
- Fall 2020 – Pilot forms
- Spring 2021 – Begin campus rollout using 'departmental developers'
- Summer 2021 – Replaced homegrown processes with new solution
- Fall 2021 – Evaluate departmental solutions for potential replacement

Costs



- While determining specific funding requirements will be a key task of this project, typical license models for this type of product fall into two categories –
 - **Cloud-based products - per user license** – annual flat fee model giving full access to core functionality with the ability give departmental access with reduced functionality for an additional fee
 - **Platform FTE license** – usually allow for cloud or on-premise access with a full suite of functionality that is priced based on your full-time equivalent (FTE) student population
- Cost for each of these options could range anywhere from \$20,000 to \$100,000/year
- Initial funding should come from RSVP Technology funding
- Long-term funding streams should be identified and added to IT Services budget
- Additional licensing for department developers should come from Departmental budgets

