

Workflow Finally Gets Easy
Build Setup-Based Routings with GT eForms™ 2.8

Session #26907
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Anaheim, California

Overview

In the session we will build a PeopleSoft-based workflow routing from start to finish using GT eForms™ 2.8.

- We will demonstrate how easy it is for functional analysts to implement workflow routings, using our online setup-based application, with no coding required!
- We will show you how can create great looking HTML emails with little or no technical effort.
- You'll see how highly complex approval processes can be built, managed and changed in our flexible business process management framework.

Goal: Automate More Business

In the Information Age, it is generally accepted that we should all automate as much of our business as possible. Why is that again?

- *You don't have to pay salaries to computers!*
- Better and faster results
- Less human effort
- More replicable business processes
- Easier to train users
- Easier to audit
- Storage / retrieval / permanence
- **Green Savings – Reduced paper / material / storage costs**

Challenge to Automation

- Delivered workflow solutions are either:
 - Too inflexible, or
 - Too feature-heavy
- Custom workflow solutions are too hard!
 - Tech-heavy
 - The more you do, the harder it gets

The Good News?

We've Fixed This.

Functionally Easy Workflow Demo



Here's What we Need You to Do, Kay -

- When anyone makes a change on the **User Profile (USERMAINT)** component,
- Send an email to the GT Security Data Steward, Bob Gerund (**GTCSECDSW1**). Tell him:
 - The User ID whose security changed.
 - That User ID's email address.
- Make it a pretty email with the standard GT email header and footer. (Please put the header at the top, and the footer at the bottom.)

Well Done, Kay!

(applause appropriate)

Presenter

- Paul Taylor
 - President and CEO of Gideon Taylor
 - Twelve Years as PeopleSoft Professional
 - Founded Company in 2001
 - Creator of GT eForms™ and ePAF™

Who is Gideon Taylor?

- Gideon Taylor, headquartered in Pleasant Grove, Utah, is a PeopleSoft custom solutions provider for business, education and government organizations.
- GT's mission is to revolutionize business processes through the use of automation, integration and electronic forms technology.
- Our vision is to help businesses create solutions that realize the full value of their ERP technology platform investments.

What is the GT eForms™ Solution?

- **GT eForms™** is a bolt-on electronic forms toolset that can be installed on any current PeopleTools-based application using delivered installation scripts and Install Guide.
- **GT eForms™** is an electronic form development framework that allows *any paper process* to be turned into a PeopleSoft-based, workflow-enabled electronic form.
- **GT eForms™** provides users with the overall architecture and guidance to create and use forms that expedite and improve business processes.
- **GT eForms™** enhances the benefits of traditional paper forms by adding “smart” capabilities:
 - Self-checking for errors
 - Automatic storage and instant retrieval
 - Different fields for different users and business conditions
 - Auto-routing
 - Built-in security
- Navigation and presentation information is stored in setup tables that can be managed by functional business analysts with little or no developer intervention.

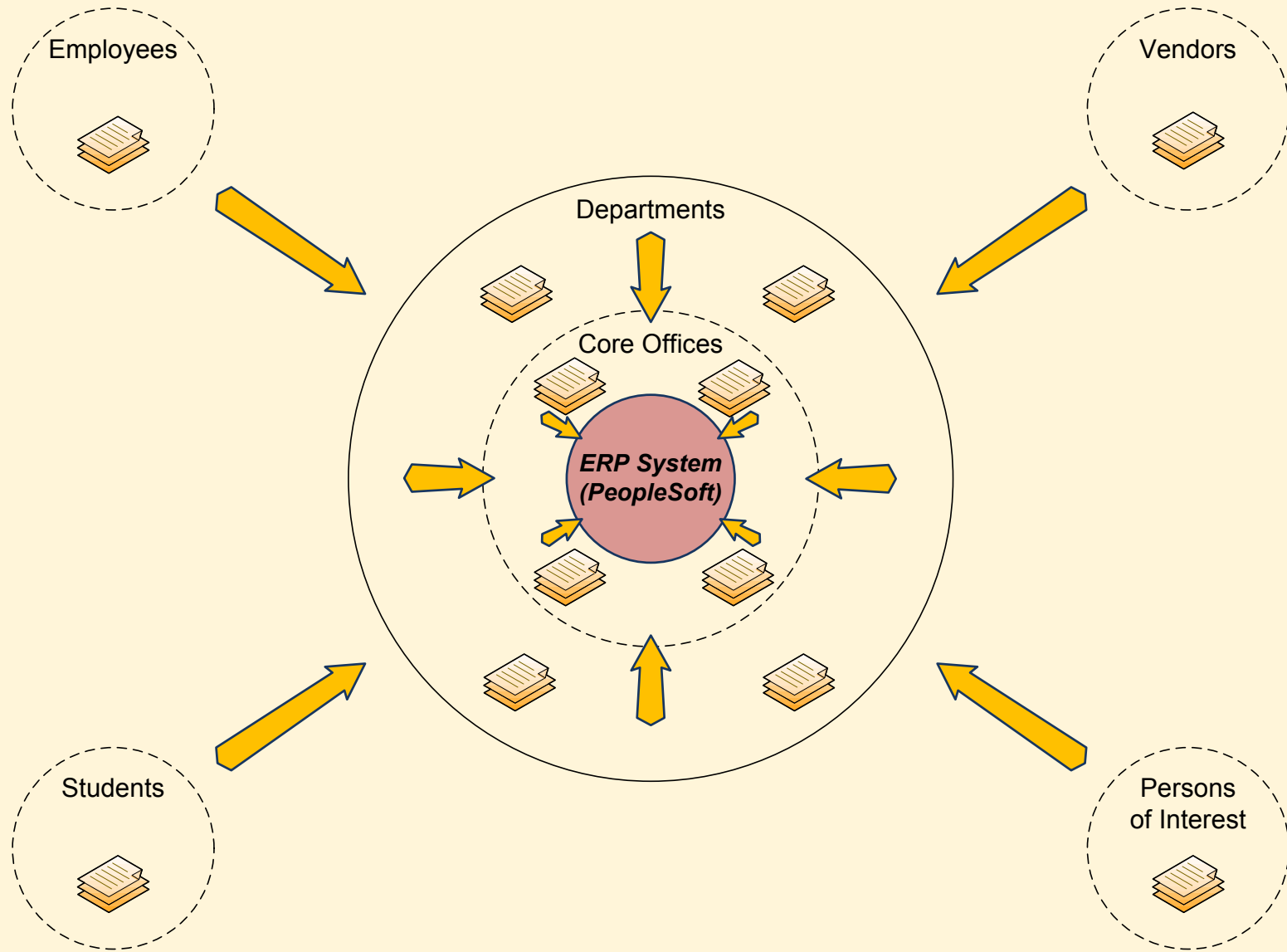
We're Hitting Automation Goals

- *You don't have to pay salaries to computers!*
 - *U Utah: 88% decrease in over/comp time first 6 months*
- **Better and faster results**
 - *U Houston: Average process time from 15 days to 3 days*
- **Less human effort**
 - *U Florida: 75% reduction in total human effort*
- **More replicable business processes**
 - *U Florida: Error rate from 68% to 1%*
- **Easier to train users**
 - *U Florida: Reduced PAF training from 8 hours to 1½ hours*
- **Easier to audit**
 - *OUHSC: Internal auditors praised solution for ease of oversight*
- **Storage / retrieval / permanence**
 - *U Utah: Eliminated vexing problem of HR forms lost in routing*
- **Green Savings – Reduced paper / material / storage costs**
 - *BYU: Went from seven huge paper filing systems to one*

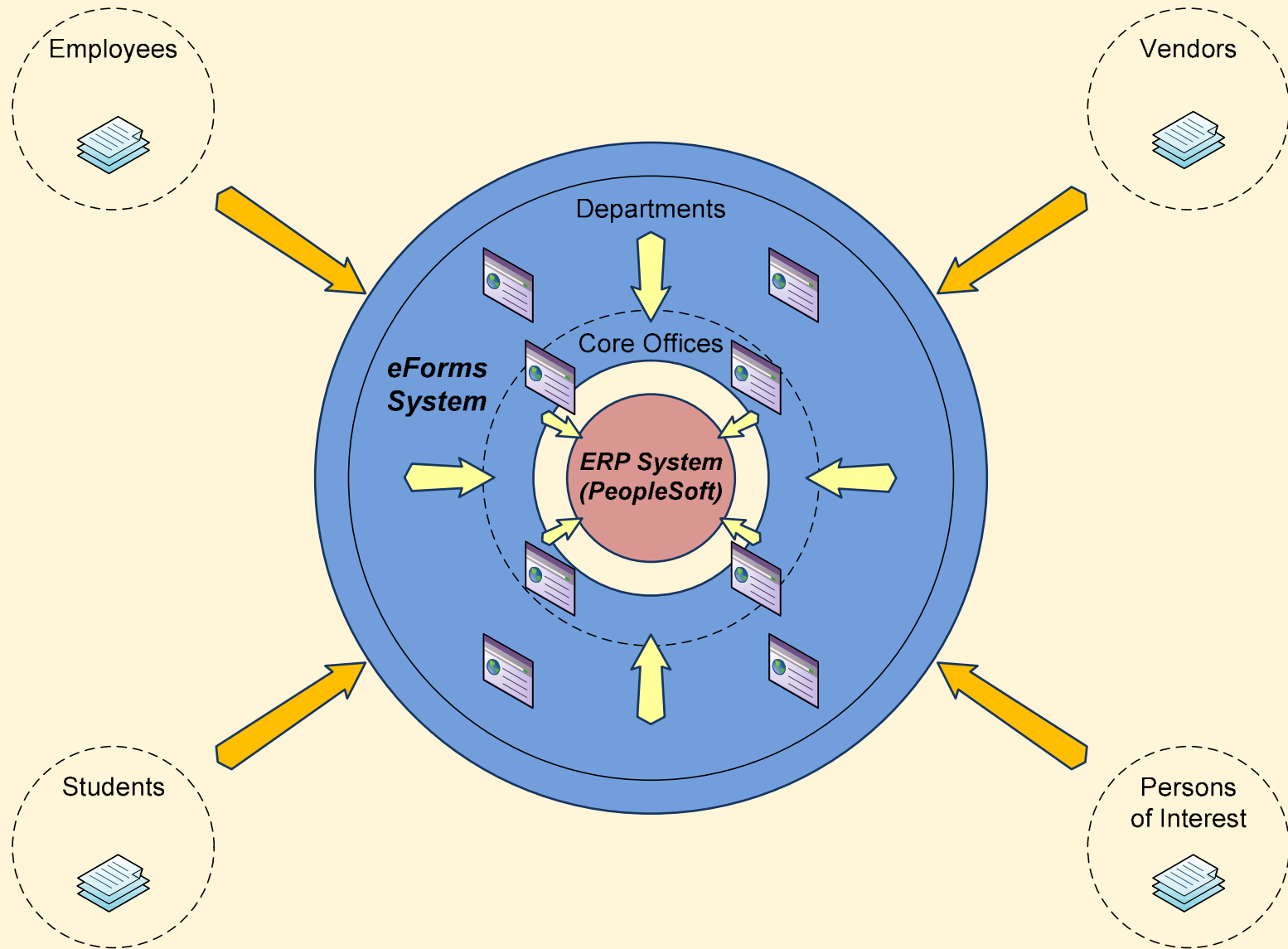
GT eForms™ in the Enterprise

- Usually most business process participants in the enterprise use paper or “dumb” forms, which core office staff must enter into cumbersome delivered PeopleSoft pages.
- GT eForms™ pushes automation out into the enterprise, allowing departments to use simple, guided eForms.
- Core office users also do their work in eForms, which enter themselves into the delivered PeopleSoft pages!
- As GT eForms™ solutions are leveraged to automate more business processes and process tasks, more efficiencies are realized.

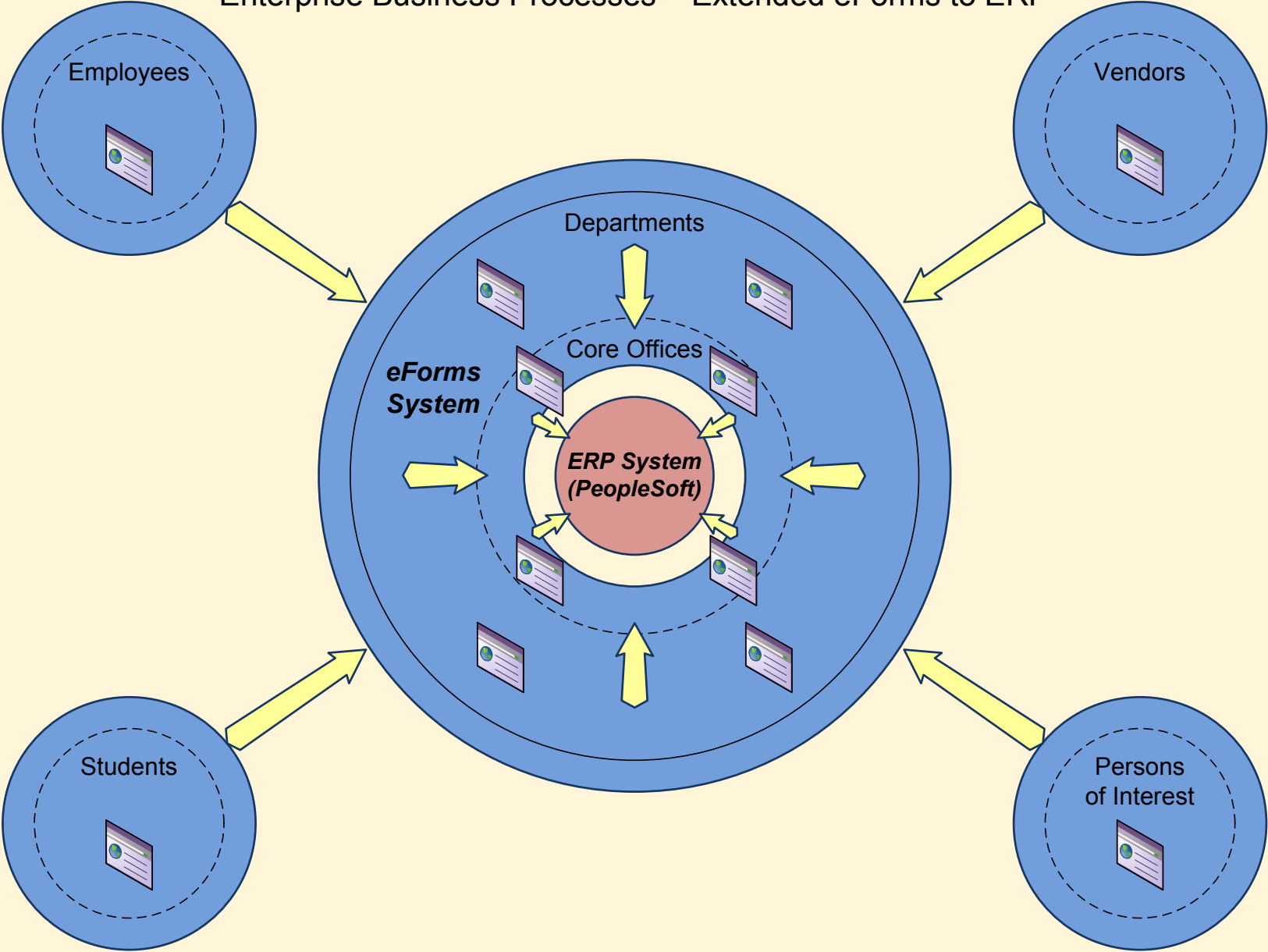
Enterprise Business Processes – Paper to ERP



Enterprise Business Processes – eForms to ERP

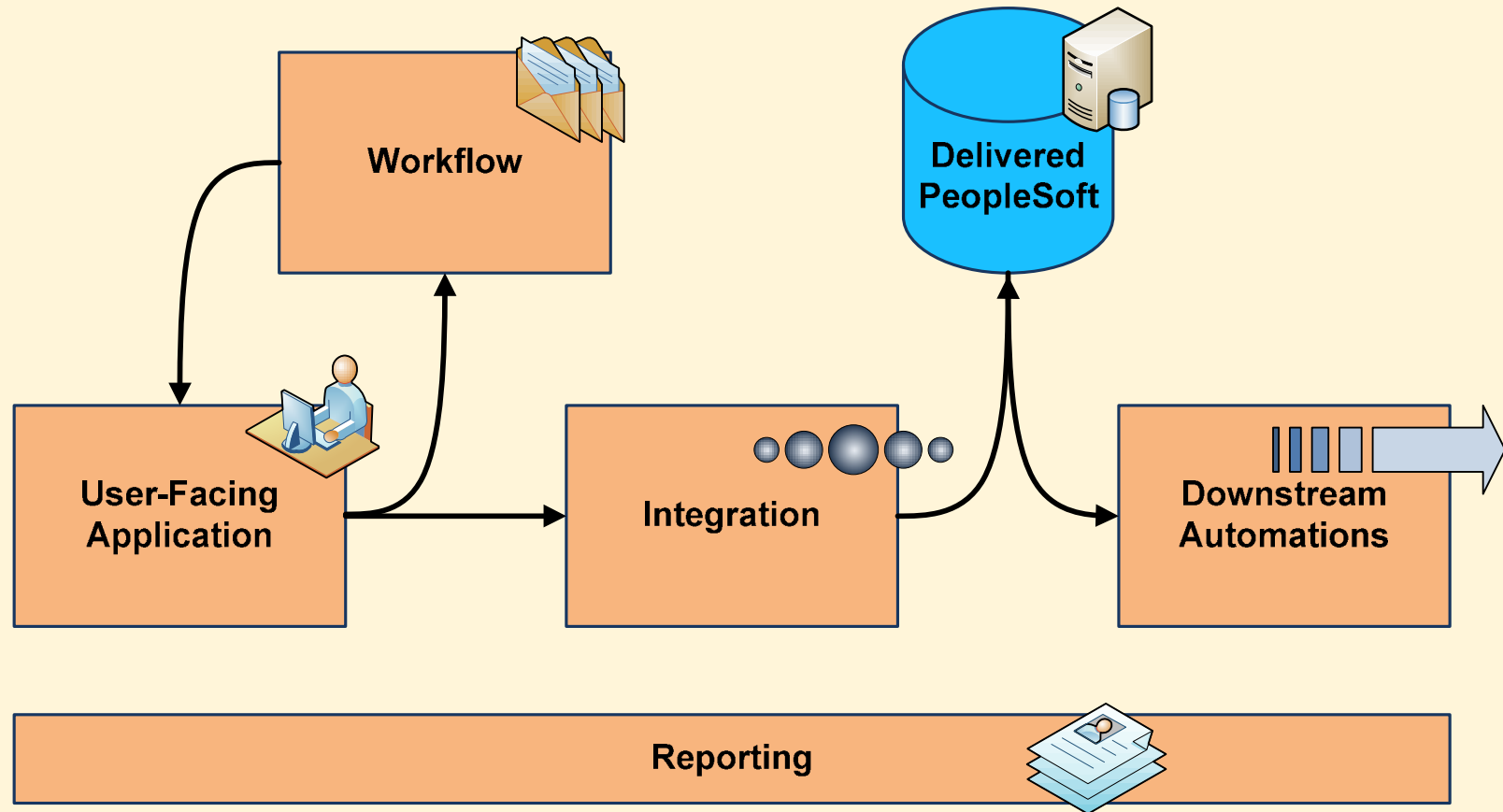


Enterprise Business Processes – Extended eForms to ERP

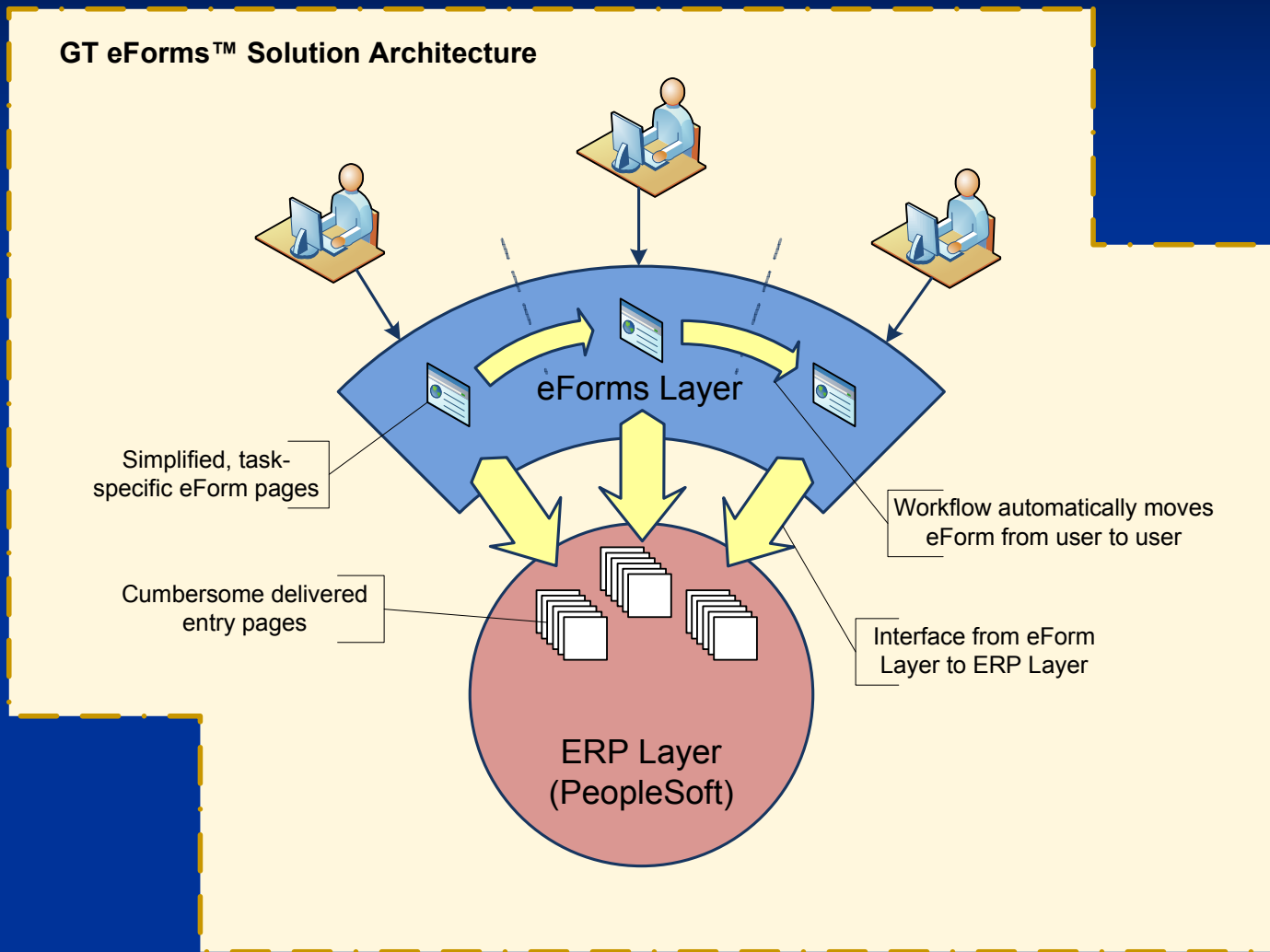


What About Complex Workflow Applications?

Full GT eForms™ Structure



What About Complex Workflow Applications?



GT eForms™ provides Robust Routing

- Multiple, Role-based approver lists
- Pooled approver steps
- Graduated approval authority
- Conditional branching based on transaction type, division or department, etc.
- Org chart routing by Department Security
- Org chart routing by Position Reports-To
- Empty Role Skips
- Conditional Skips
- Parallel Approvals
- Required Steps
- Required Step Override Roles
- Standard notifications to the originator through the approval process
- Custom role- and rule-based notifications

Full eForm Demo



GT eForms™-Based Solutions

- **ePAF™**
Electronic HR transactions, including Hire, Job Change, Employment Status Change, Manage Position, Additional Pay
- **Invoice eForm for A/P**
Populate PS Vouchers from an eForm
- **GT Paperless I-9™ with E-Verify**
Fully reg-compliant electronic I-9 with web services integration to DHS E-Verify system
- **GT Personnel eFile™**
Put your whole personnel file online, including eForms, scanned docs and notes
- **Security eForm**
Replace paper security access requests with a self-routing, self-applied eForm
- **eForm Library**
Repository of all eForms developed for the GT eForms™ platform

New Functionality

In 2008, while other companies cut their R&D, Gideon Taylor made substantial product development investments.

- GT Paperless I-9™ / GT E-Verify Integration™
- GT Personnel eFile™
- Invoice eForm for A/P
- eForm Admin Console
- Functionally Easy Workflow
- Online Approver Lists
- Online HTML Email Management
- Online Home Page Management
- Visual Ifs – Easy Filters and Expressions
- Process Visualizer
- Version and Patch Tracking
- eForm Migration Tools
- GLIB Class Hierarchy

Budget Cuts Don't Mean Business Cuts

GT eForms™ 2.8 lets you adapt to the rapidly changing business climate.

Instead of cutting productivity, you can cut the time and effort it takes to be productive!

Don't wait for a bailout from Congress – GT eForms™ has a proven track record of doing more with less.

Unlimited Possibilities

GT eForms™ provides innovation that increases your productivity combined with tools that will revolutionize your business processes.

Gideon Taylor has used the GT eForms™ framework to develop electronic forms for HCM, Financials and Campus Solutions suites.

GT eForms™ can revolutionize *any business process!!*

Questions?



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