

Wednesday, March 1, 2023

SESSION #9838

**Los Rios Community
College District: Lessons
Learned on Our Road to
Total Transformation**

ALLIANCE2023

Meet the Team



DAVID JAMES ROWE

Director of Enterprise Applications
Los Rios Community College District



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Senior Business Analyst
Gideon Taylor Consulting

Los Rios Community College District



The four Los Rios colleges – American River College, Cosumnes River College, Folsom Lake College, and Sacramento City College - serve students throughout the Sacramento region (roughly 60,000 FTES). Los Rios offers a wide array of degree, transfer, and certificate programs to help students into the careers they've always dreamed of.

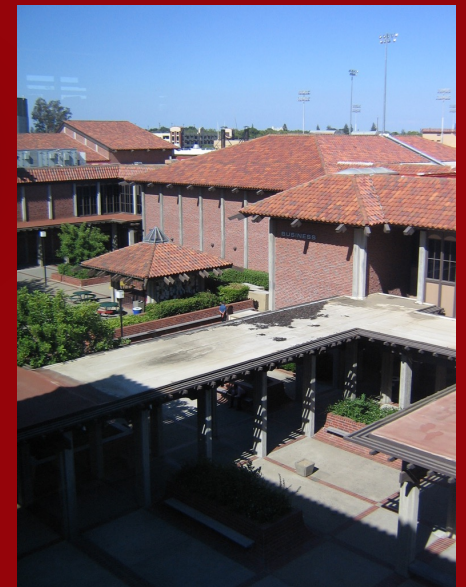
Peoplesoft Footprint

Client for 20+ years

Applications: HCM, CS and FS

PeopleTools version 8.58

GT eForms release 3.50.01



PeopleSoft Forms Implementation

Developed 9 student facing forms using PeopleSoft Forms and Approval Builder. First two forms went live in August 2020 and last form went live in June 2021.

- August 2020 – Course Repeat and Exceeds Unit
- September 2020 – Late Add, Late Drop, and Major Change
- December 2020 – Academic Renewal, Loss of Priority Registration, and Time Conflict
- June 2021 – Refund Request

Decision to use Peoplesoft Forms and Approval Builder included:

- Part of PeopleSoft – already own, no extra purchase
- Less overhead - no integration needed, be able to leverage PeopleSoft data
- Rapid form development and deployment
- Forms and approvals are secured and enforced by login

What Worked In Initial Release?

- Simple Forms workflows designs
- Multiple Approval Levels
- Approval routing based on form values
- Prompt Controls

Desire for Additional Optimization over Vanilla PeopleSoft



External Participants

Wanted to ability to involve non-system users in the workflow process.



Maintaining Customizations

Customizations had to be maintained to populate field data and manage attachments.



Layout Limitations

Prompt field lengths could not be controlled and Instructions were not user friendly



Reporting Enhancements

No good form query / filter mechanism for Approvers.



GT eForms™ - Validated PeopleSoft
Automation Solution

PeopleSoft Project Services

AI Digital Assistants

Process Optimization Analysis

PeopleSoft 'Keep Current'
Services

Full-Stack Cloud Managed Services

Automation Centers of Excellence

Integrated / Automated Testing – PeopleSoft
and Beyond

Robotic Process Automation



Build Grow Serve

Delivering on the Promise of PeopleSoft

Helping clients envision and create custom solutions for PeopleSoft using eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, UX and conversational AI.

Founded in 2001, based in American Fork, UT

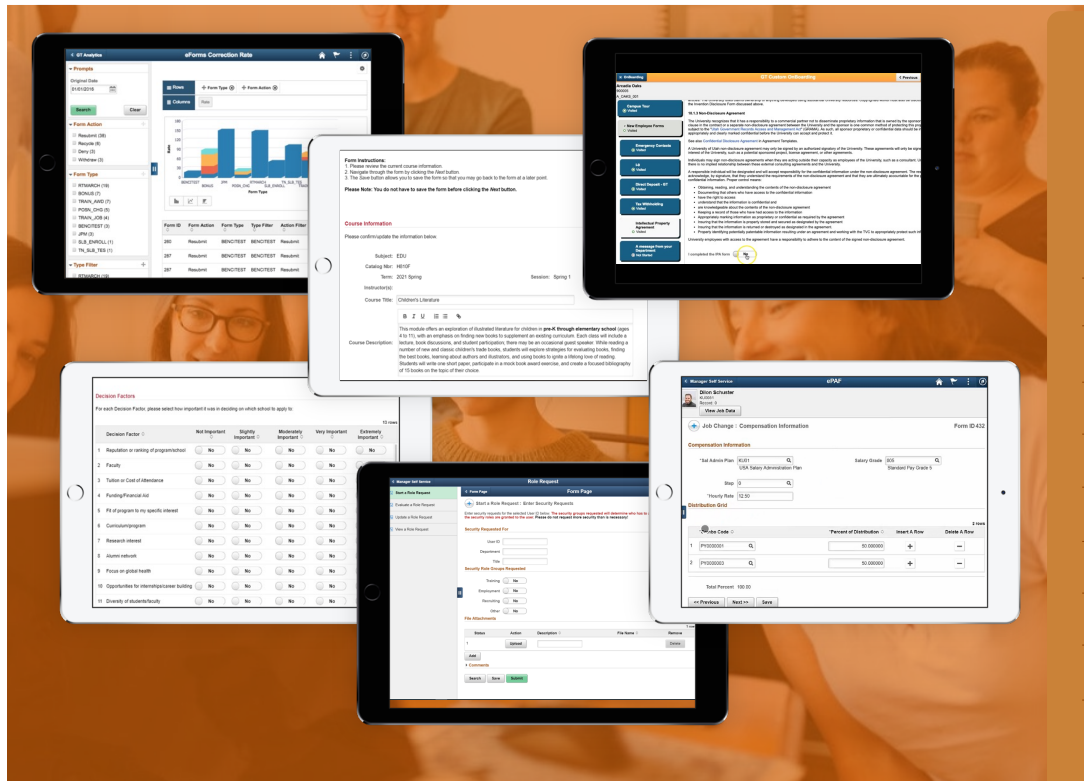
Gideon Taylor is a PeopleSoft custom solutions provider for business, education, and government organizations

Partner



GT eForms™ – Unparalleled Automation

ORACLE
Validated Integration
PeopleSoft



Build Configuration-based Custom Fluid Solutions

Configuration-based Form creation

Pre-Population

Conditional form behavior

Restricted valid values

Bulk actions

Attachment management

Configurable routing

Full PeopleSoft security


Edits & validations

Reporting & analytics


Transformative Results

 **700% Efficiency Increase**

 **Turnaround reduced from 5 days to 30 minutes**

 **Reduced manual intervention & errors to less than 1%**

 **Saved over 90% of time for new employee onboarding**

 **Direct year-on-year ROI over \$300,000**

Project Overview and Scope

1

Release Priority #1

After GT eForms Framework was purchased, the decision was made very early that forms need to be in a single place and not across two platforms. All previously built forms with Forms and Approval Builder should needed to be created as a GT eForm.



HR Efforts

1. Convert the PDF Classroom Faculty Evaluation form into an online form where admins can update the performance evaluations for faculty and route to the Dean for review and comments.
2. Convert the PDF Employee Service Agreement (ESA) Hire form into an online form with dynamic workflow process to include external participants.



Campus Efforts

1. Create a new eForm - Zero Textbook Cost eForm that can allow faculty to add or remove ZTC attribute from their class.
2. Convert three Residency Exemption Requests from PDFs to GT eForms. Use automation to update the Student's Residency data in PeopleSoft.

The Road Travelled So Far in Campus & HR

20 forms
launched

4 efforts in progress

- Faculty Performance Review
- HR Payroll Timesheet Entry
- Phase II – Automation on the Hire into Employee Service Agreement
- Refactor eForms to use Helium Performance from GT Framework version 3.50

9 Student eForms
58 HR eForms
18 Finance eForms

85 forms
identified for
eForm
Consideration

- Student Account Refund Request
- Petition to Late Add a Course
- Petition to Late Drop a Course
- Petition to Repeat a Course
- Petition to Exceeds Max Units
- Petition for Academic Renewal
- Time Conflict Petition
- Loss of Priority Registration
- Petition to Change Major or Educational Goal
- AB540 Residency Request
- Residency Reclassification or Appeal Request
- AB343 Residency Request
- Hire into Employee Service Agreement
- Campus Specific Intent to Employ
- COVID Exemption Request – Student
- COVID Exemption Request – Employee
- Student Request to Change Personal Data
- Student Enrollment Verification
- Zero Textbook Cost Attribute Management
- Campus Based Funding Request

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eForm Results

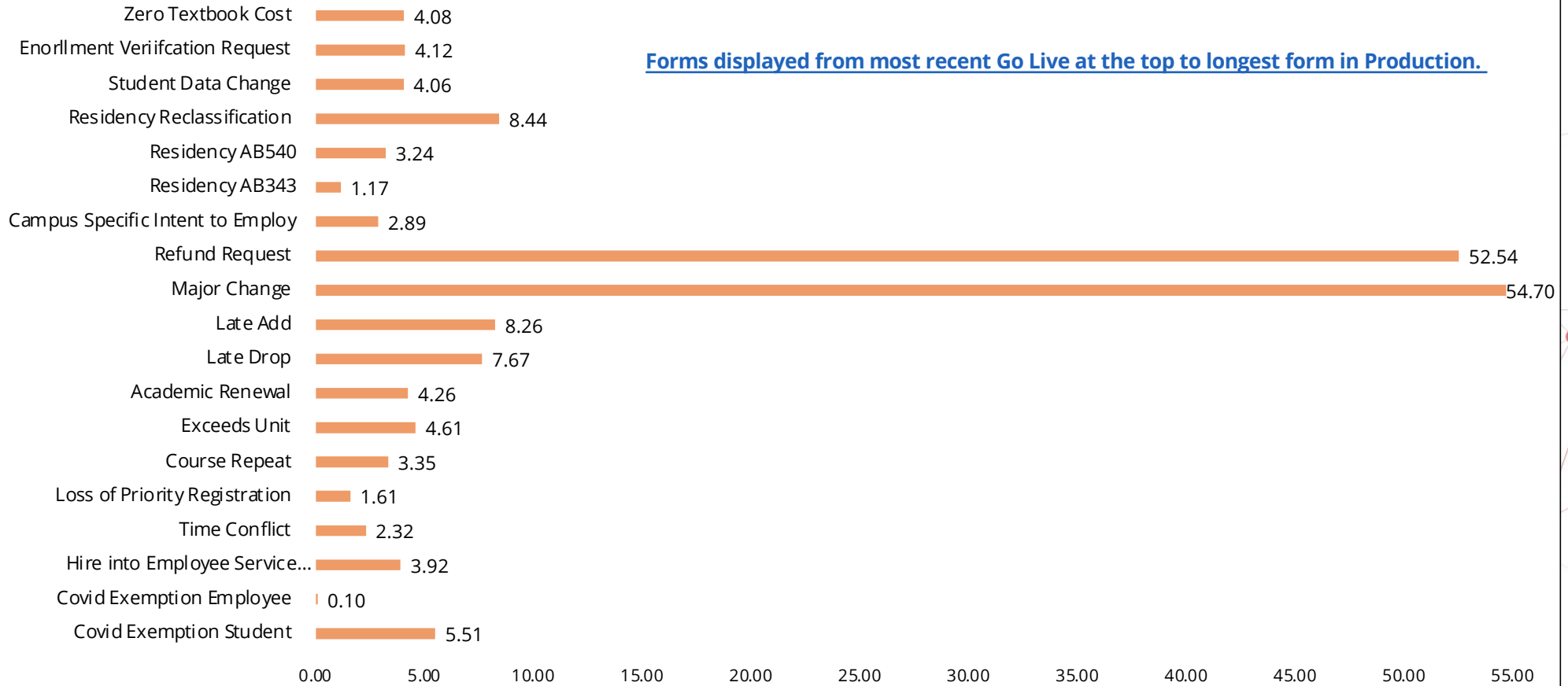
Form Type	Go Live Date	Forms Submitted
Covid Exemption Student	1/11/2022	2209
Covid Exemption Employee	1/12/2022	41
ESA Hire Form	5/26/2022	1047
Time Conflict	7/18/2022	495
Loss of Priority Registration	7/18/2022	343
Course Repeat	7/18/2022	713
Exceeds Unit	7/18/2022	981
Academic Renewal	7/18/2022	908
Late Drop	7/18/2022	1633
Late Add	7/18/2022	1759
Major Change	7/18/2022	11652
Refund Request	7/18/2022	11191
Campus Specific Intent to Employ	8/2/2022	572
Residency AB343	9/19/2022	176
Residency AB540	9/19/2022	486
Residency Reclassification	9/19/2022	1266
Student Data Change	10/25/2022	463
Enrollment Verification Request	10/25/2022	470
Zero Textbook Cost	11/2/2022	432
Total GT eForms		36837

Data as of 2.16.2023

eForm Results

Avg Form Per Day Since Go Live

Forms displayed from most recent Go Live at the top to longest form in Production.



Lessons We've Learned Along the Way

Planning the Route



Identify the right people to participate.

Packing Up the Car



Setting expectations and engaging the team.

Plan for the Pitstops



Planning ahead for refreshes and don't overburden the process

Share the Driver's Seat



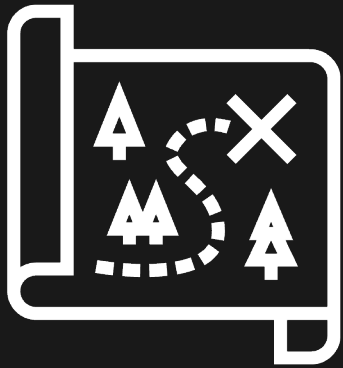
Bring in additional drivers to keep moving forward.

Now Arriving to Our Final Destination



Deployment and Ongoing Support

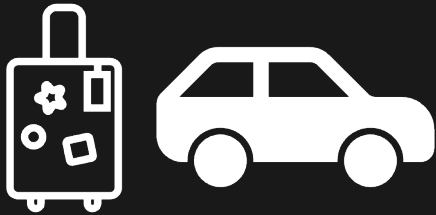
Planning the Route



Identify the right people to participate

- Understand the problem
- Identify the stakeholders
- Define the scope

Packing Up the Car



Setting expectations and engaging the team.

- **Involve existing workgroups and design teams**

- **Prioritize the quick wins**

- **Set time expectations with resources**

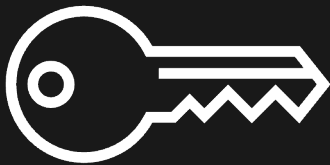
Plan for the Pitstops



*Planning ahead for refreshes
and don't overburden the
process*

- **Plan for refreshes in the project schedule**
- **Utilize existing controls**

Share the Driver's Seat



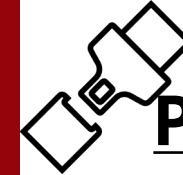
*Bring in additional drivers to keep
moving forward.*



Drivers

Los Rios District Office

- IT Analysts
- IT Systems Supervisors
- External Consultants



Passengers

Los Rios Business Team

- Human Resources Analysts
- Admission & Records
Director and Supervisors

Pit Stop to add drivers

GT Development Team

Senior Business Analyst

Lead Technical Analyst

Technical Analyst I

Now Arriving to Our
Final Destination



Deployment and Ongoing Support

Inform

Empower
users with
information



Deploy

Communicate
and plan for
launch



Support

Leveraging existing
structures for
support and
improvement

GT eForms™ Demonstration: *Zero Textbook Cost (ZTC) Attribute eForm*

Created with GT eForms 3.30 | September 2022

 **GIDEON TAYLOR**

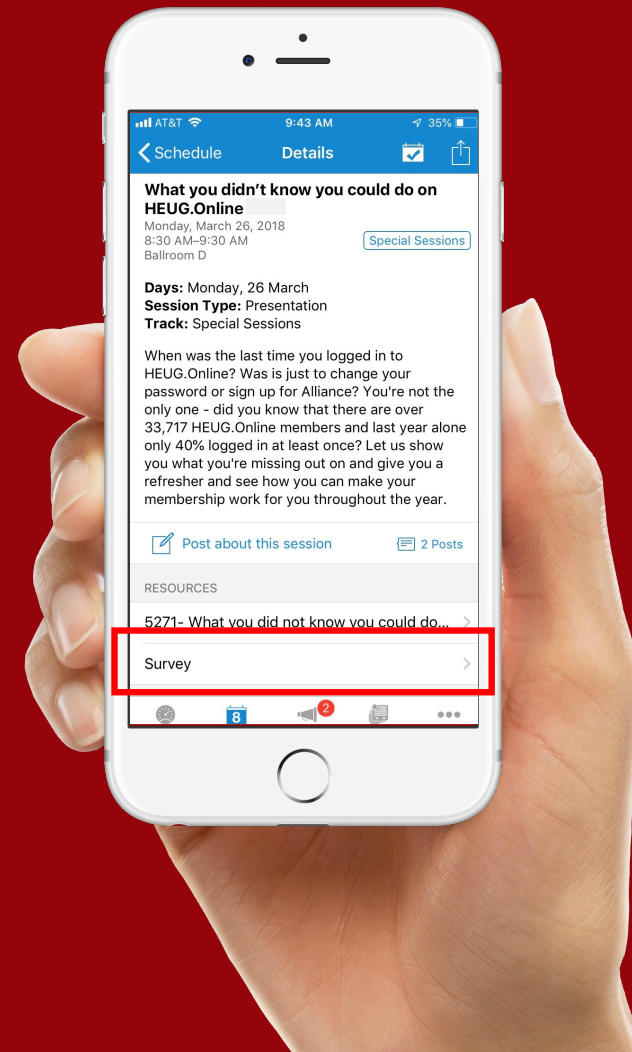
ORACLE | Partner

ORACLE
Validated Integration
PeopleSoft

Questions?

Session Surveys

1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the "Resources" button and "Survey"
You will be required to login once with your Eventsential username and password.





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THANK YOU!

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