



■ **GIDEON TAYLOR**



Giving your
Enterprise a
Voice

GT Webinar Series

ORACLE | Partner

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SILVER

Accelerating PeopleSoft Innovation in Higher Ed

August 2023



Welcome



Andrea Lloyd
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Assistant Director, Campus Solutions
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North Dakota University System



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



Giving Your Enterprise a Voice

Delivering on the Promise of Enterprise Technology

Gideon Taylor enables clients to envision and create custom solutions for eForms and workflow technology, OCI cloud hosting, UiPath RPA, always-current managed services, full-service consulting and staffing, WebUX 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.

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Some of our Clients...

Berkeley
UNIVERSITY OF CALIFORNIA

LSU Health
NEW ORLEANS


NORTH DAKOTA
UNIVERSITY SYSTEM

GRCC
GRAND RAPIDS COMMUNITY COLLEGE


WISCONSIN
UNIVERSITY OF WISCONSIN-MADISON


UT Health
San Antonio


NORTHERN
ARIZONA
UNIVERSITY


University
of Windsor


THE UNIVERSITY
of NORTH CAROLINA
at CHAPEL HILL


PRINCETON
UNIVERSITY


UNIVERSITY OF
SOUTH CAROLINA


LOS RIOS
COMMUNITY
COLLEGE DISTRICT


The UNIVERSITY of OKLAHOMA


THE
UNIVERSITY
OF UTAH

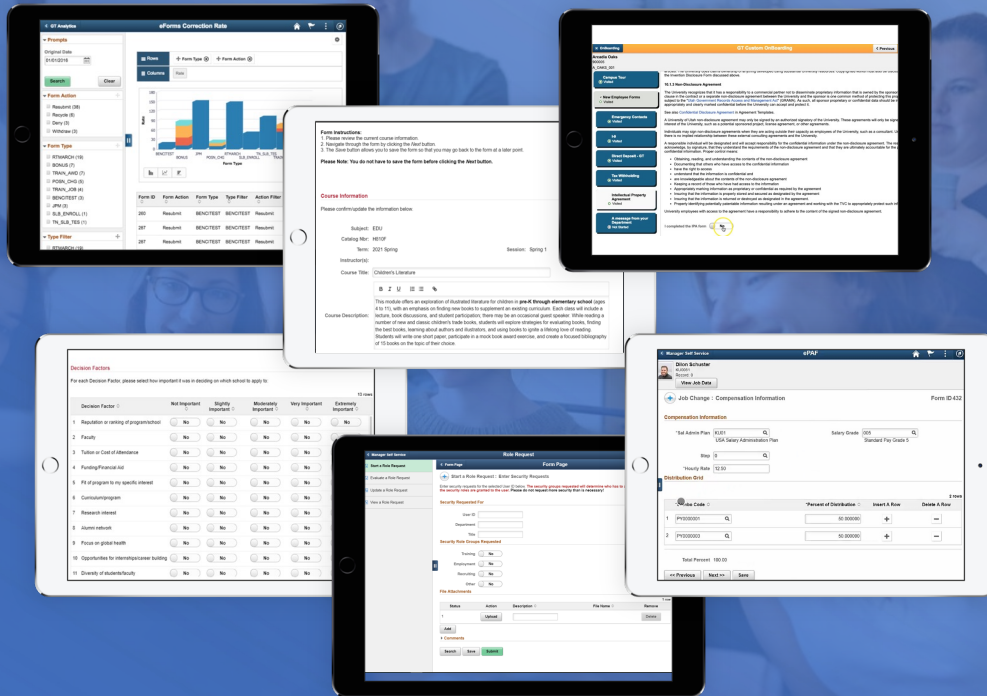

PALOMAR COLLEGE
Learning for Success

RIT



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



Why Automate Business Processes?

Efficiency

Consistency

Effectiveness

Productivity

Flexibility

Simplicity

Accuracy

User

Experi-



Berkeley

UNIVERSITY OF CALIFORNIA



About UC Berkeley


- 45,745 FTE: Undergraduate and Graduate
 - 7 Undergraduate Colleges
 - Graduate Division
 - Berkeley Law
- Purchased GT eForms in 2016
- Implemented Peoplesoft CS 9.0 in 2015, 9.2 in 2018
- Currently on GT 3.50, upgrading to 3.58 in November 2023

Our Journey with eForms Automation

Before GT eForms...

- Prior to 2016 implementation
 - PDF/Paper forms
 - Processes were system updates completed by staff
 - Time from submission to completion and updates to the systems - weeks
 - Data entry errors
 - Misplaced requests

Why GT eForms...

- Most versatile of the solutions considered
 - Peoplesoft AWE
 - Development vs. Configuration
 - Business process gaps created by implementation of Campus Solutions
 - Approvals in minutes vs. weeks
 - Automated System Updates
- 



Who Have We Engaged?

Students

- Undergraduates
- Graduates
- Law
- University Extension


Colleges

- Berkeley Law
- Berkeley Graduate Division
- College of Chemistry
- College of Engineering
- College of Environmental Design
- College of Letters & Science
- Rausser College of Natural Resources
- Haas School of Business
- College of Data Science and Society

Staff

- Office of the Registrar
- Financial Aid & Scholarships Office
- Summer Sessions
- International Office
- Athletics
- Disability Access & Compliance Services
- Undergraduate Advising
- Graduate Advising
- Student Financials
- Admissions
- Central Evaluation Unit

Faculty

- On-Campus
 - Off-Campus
- 

What Have We Built?

Enrollment Processes

- Late Class Schedule Actions
 - Drops, Add, Units, Grading basis
- Term Cancellation
- Term Withdrawal
- Class Enrollment
- Exceptional Enrollment Verifications

Academic

- Change of Expected Graduation Term
- Change of Requirement Term
- Add/Drop/Change of:
 - College (Undergraduate)
 - Major (Graduate/Undergraduate)
 - Program (Graduate)
 - Designated Emphasis (Graduate)
 - Minor (Undergraduate)
 - Subplan (Graduate/Undergraduate)

Graduate Specific

- Advancement Committee Creation
- Qualifying Exam Results
- Qualifying Exam Committee Creation
- Doctoral Candidacy Report
- Parental Leave
- In Absentia
- Filing Fee
- Internship Leave
- Dissertation/Thesis Completion
- Academic Exceptions
- Readmission

Law Specific

- Intention to Take Bar Exam
- Jurisprudence Award
- Prosser Prize
- Academic Rule Exceptions

Additional Forms

- Emergency Loan Request
- Veterans Benefit Renewal
- Course Breadth Adjustments
- Multi-Term Course Grading Basis Selections (COVID-19)
- Room & Mid-Term Scheduling
- Entry-Level Writing Requirement

In the Near Future

- Department Admission
 - Grade Exceptions
 - Undergraduate Readmission
 - Appointment and Fellowship Exceptions
-
-

My Classes FALL 2023

BIOLOGY 1AL
General Biology Laboratory

CHEM 3A
Chemical Structure and Reactivity

CHEM 3AL
Organic Chemistry Laboratory

NUSCTX 103
Nutrient Function and Metabolism

My Groups

There are currently no groups available.

Tasks

Incomplete (10)

Completed (44)

Click "View" to see tasks, due dates, and instructions.

Overdue

Non-Immigrant Information Form
Due May 22, 2021

Non-Immigrant Information Form
Due May 22, 2021

Non-Immigrant Information Form
Due May 22, 2021

Arrival Confirmation
Due Jul 6, 2021

Arrival Confirmation
Due Jul 6, 2021

Arrival Confirmation
Due Jul 6, 2021

Update Local US Address &Phone
Due Jul 6, 2021



You are up to date!
No new bCourses notifications to show.

Student Resources

Submit a Form

[Apply for an Emergency Loan](#)

[Withdrawal Form](#)

[Verification Request: Enrollment, Degree, Good Standing & more](#)

[Late Schedule Change Petition](#): COE and L&S students can submit late action requests until the Friday before RRR week at 11:59pm PST. Students can change grading options via the Enrollment Center until the end of the 10th week of the semester, and after that through this eForm.

[Legal Name Change Request](#)

Manage your Forms

[View Submitted Forms](#)

[Update Pending Forms](#)

[Submitted Emergency Loan Forms](#)

Campus Services


[Mental Health Resources](#)

How It All Adds Up

In Production

- 30 Forms
- ~200+ different requests
- 435,000 eForms submitted (Average #/month)
 - 2023 - ~72,400 (9,000)
 - 2022 - ~80,000 (6,700)
 - 2021 - ~56,800 (4,700)
 - 2020 - ~64,400 (5,400)
 - 2019 - ~57,100 (4,800)
 - 2018 - ~44,700 (3,700)
 - 2017 - ~41,200 (3,400)
 - 2016 - ~15,200 (1,300)
- Approaching ~1 M form initiations

Upcoming

- 4 forms in development
 - 4 forms ready for development to begin
 - Enhance and upgrade existing forms
 - Upgrade to 3.58 version Nov 2023
 - Prioritize queue of new form requests
- 

Our University System

- The North Dakota University System (NDUS) consists of 11 campuses:
 - 5 community colleges
 - 4 regional universities
 - 2 research universities
- 43,000 students
- PeopleSoft since 2004; GT eForms since 2021
- GT eForms 3.50 (upgrading to 3.58 in October)



Before GT eForms...

TransForm was purchased in 2015.

- Form application allows for electronic form submissions into Perceptive Content, document management system, for processing and storage.
- Forms save in a TIFF image format and processed via workflow functionality in Perceptive Content.
- Forms function like a fillable PDF.
- Application enabled some efficiencies; however, TransForm is no longer being supported for future enhancements.
- Forms are updated and maintained by Enterprise Applications staff
- Users wanting to maintain their institution-specific forms required a level of technical background and a designer license.
- The more we evolved, the more we saw holes in the process


We wanted more, we needed more

- *How can we provide better efficiencies to our institutions?*



Evaluating the Options...



- **Researched other form options**
 - Cost comparisons were a primary concern
 - What do we have today that could potentially be used?
 - Pros and cons were considered on all form solutions research
 - **Researched Delivered PeopleSoft Forms**
 - Out of the box functionality
 - Would the functionality meet our needs?
 - What efficiencies could be given to our institution?
 - **Request for Proposals**
 - Will this meet the needs for now and for future growth?
 - Can it create efficiencies for institution processing?
 - Real-time interactions (workflow, processing & notification needs)
- 

Our GT eForms Solutions so far...



Statewide Forms for all institutional use:

- Collaborative
- Withdrawal
- Name Change
- FERPA
- Residency

Other forms:

- Registration Action
- Major/Minor/Advisor/Certificate Change
- SAP
- Summer Financial Appeal
- The list goes on...



Demo!




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The Results



- As of 8.15.2023:
 - **146 form types in our Production environment** with new forms pending in our project list
 - **98,019 forms submitted**
 - End User Feedback
 - “The recycle feature is very helpful. Any updates to the request can be made with ease and reduces duplicate submissions.”
 - “Having the forms update Campus Connection automatically is such a time saver!”
 - Where are we going from here?
 - Print Functionality
 - Reporting
 - Business Functionality
 - Retention
- 

RIT



About Rochester Institute of Technology


- Located in Rochester, NY
- 12 Colleges – One central Registrar's Office
- 5 Global campuses
- ~17,000 students
- PeopleSoft since August of 2012; GT eForms since Sept 2022
- GT eForms 3.58 with Helium

Our Journey with Forms Automation

Before GT eForms...

- Paper forms -> PDF forms
- Website upload via a webform, ticket routing, and processing
- Many issues: upload size, incorrect data, unauthorized signatures, incorrect upload and routing

Why GT?

- Reviewed similar tools: Document system-based forms, PS form tool, PS Approval Framework, homegrown web-based solutions, and maintaining current state
 - Considerations: Functional management, growth/scale, security, and vendor support
- 



Where we are today...

What we have implemented...

- Leave of Absence/University Withdrawal Request
- Return from Leave, Change to Expected Graduation, Change of Grade, Course Substitution pending release to production.

Where we're going...

- Three forms every four months
- 

Demo!



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What we've achieved...

- Hours upon hours saved with one form
- Student initiated form with clear audit-able approvals from needed parties
- Accurate data (UID always matches, instructors always match)
- Output files to OnBase to maintain existing workflows
- Much shorter turnaround time for Return to Title IV compliance (less chasing)
- Confidence in the systems
- Requests for more eForms!

Empowering Users Through Mindful Automation

Auto-population and intelligent defaulting ensure accuracy, increase speed, and reduce the amount of data required of the user

Easy access to forms, form status and form data empowers users with on-demand information and reduces calls to the help desk

Conditional routing and email notifications ensure compliance and accelerate turnaround

Conditional logic guides the user, hiding complexity and reducing need for training and documentation



Related displays provide meaningful information to the user

Restricted prompt values simplify choices and remove opportunities for error

Field attributes and form layout define an intuitive user experience

Gideon Taylor

Products: GT eForms

Specializing in business processes and automation in a PeopleSoft ecosystem.

Cloud

Products: PureRed

Specializing in moving to the cloud, managing your cloud or SaaS'ifying PeopleSoft



Newbury

Products: UiPath Reseller

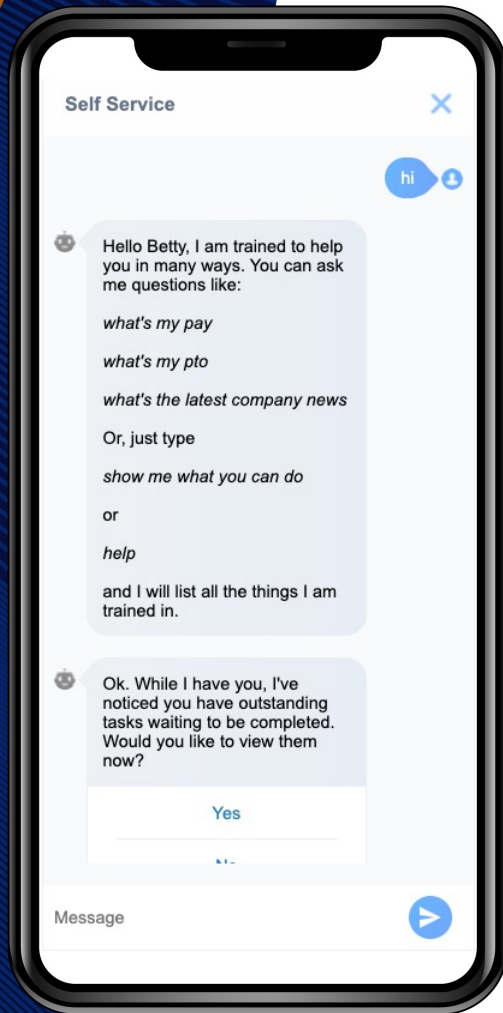
Specializing in full life cycle PeopleSoft consulting services, Oracle Cloud Applications implementation and integration and RPA.

IntraSee

Products: WebUX and Ida

Specializing in a one-stop front-end user experience on the web, mobile or via automated chat.





Meet Ida IntraSee's Digital Assistant

- **Enterprise-grade digital assistant**
- Uses machine learning AI to learn new responses and new skills
- Built on Oracle's AI and Cloud
- **Scalable to thousands of questions in over 100 languages**
- **Authenticated and non-authenticated chats**
- Multi-channel capable (Web, Teams, SMS, etc)
- Pre-built catalog of questions/skills/integrations
- **Integration adapters for PeopleSoft, HCM Cloud, Microsoft, ITSM, LMS, etc.**
- Add questions, answers and topics
- Conversational satisfaction surveys
- Role-specific & personalized answers
- **Alerts, nudging and suggestions**
- **Automated deployment and testing (no expensive staffing/consulting!)**



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