

TECHNOLOGY COORDINATING COMMITTEE
RECOMMENDATION TO THE CHANCELLOR

Subject/Item: Forms Generation Software Prioritization

Background: District-wide, many forms such as conference leave and other general district-wide requests are either only available at best as a fillable PDF file (to be printed) or is in paper form, hardly matching the current needs of staff members to readily fill out forms.

Committee Recommendation:

- Recommends to the Chancellor:

The District TCC wants a study and selection of a "forms generation" (also known as "forms automation" or "forms web builder") software. We include a prioritization of features this new software should have

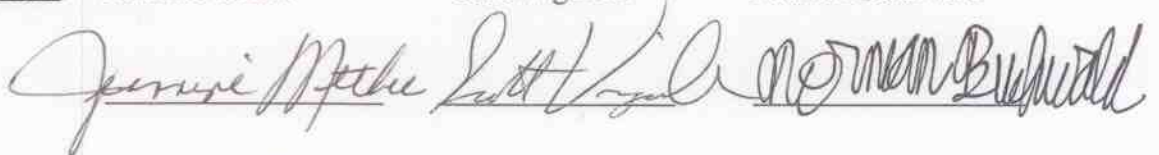
- Effective:

PASSED AND ADOPTED this 8 day of May 2015

By Consensus:

By Vote: Yes No Abstain

Submitted by Co-Chairs: Jeannine Methé Scott Vigallon Norman Buchwald



Chancellor's Action:

Approved Disapproved Table for Further Discussion



Priorities/Functionalities of Forms—(To be later ranked, this is just a list)

1. Easy to Fill Out
2. Easy to Create
3. Auto Updates from an admin version (example: our mail server change would be able once and update all forms)
4. Secure (Able to at least protect W ID numbers as well as other potential sensitive information)
5. Adaptable—any faculty/classified can easily change fields and outputs they want (and put up campus and service area logos, etc.)
6. Accessible off campus.
7. Auto Verification form was sent successfully.
8. Forms software can move to campus needs of which classified and faculty can easily create and put up.
9. Forms can be sent to more than one person simultaneously (important for guaranteed personal response and back up).
10. Statistics can easily be gathered where the person who created and maintains the forms can receive on a periodical basis.
11. Output of forms are sent in a way that the person receiving it can easily understand it (i.e. either as a table or as a csv file that would successfully migrate to any version of Excel or similar spreadsheet program.
12. There is a clear workflow as to when a form is being addressed—(who is currently assigned the form for approval, when/where—example a conference request form will be at a certain stage).
13. Ability to establish workflow on the fly (i.e. not established parameters, but workflow can be assigned after form is submitted).
14. Ability to track status/location of online form, i.e. who's holding up the form and how long have they had it?
15. Ability to attach supporting documentation to online forms.
16. Ability to electronically sign forms.
17. Full functionality in terms of radio buttons, check boxes, drop-down lists, etc.
18. Functionalities of different types of forms are assigned—administrative/instructional
19. The forms generation software may be somehow associated with one that involves sharing of documents.
20. The forms generation software may be somehow associated with a platform where areas of the District and individual campuses can maintain a blog or wiki.

At present time, the list on the left represents District-wide forms that would need to be created in a forms generation software. The items on the right need to be in a document sharing platform (which currently is through Banner).

Forms: Use	Priority	DMS: use	Priority
Classified Monthly Timesheets (Banner)		Meeting minutes	
LOA requests (Banner)		Accreditation docs	
Conference Leave: Request Form		Program Review docs	
Conference Leave: Expense Claim		Meeting agendas	
Alternate Study Contract Form		Board memo	
		Board recommendation	
Disbursement Request Form			
Facilities Request Form			
Field Trip Forms			
ITS Request for Access to Administrative Systems form			
Independent Study Contract Form			
P-Card Purchase Log Form			
Personnel Action Form (PAF) (Banner)			
Request for System Access to ePAF Form			
Requisitions (Banner)			
Sabbatical Forms			
Technology Systems Access Request form			
Transfer Funds Request Form			
Workload Banking: Request Form			
Workload Banking: Augment Sabbatical Salary			