



Paris Junior College eForms with Workflows Case Study

Products used: db's LiveForms™ PRO, Docubase Education Suite PRO

BACKGROUND

Paris Junior College (PJC) is a public community college located in Paris, Texas, with additional campuses in Greenville and Sulphur Springs. Founded in 1924, PJC has a long history of serving the educational needs of the region. The college offers a wide array of programs, including Associate of Arts, Associate of Science, and Associate of Applied Science degrees, as well as Certificates of Proficiency in various technical and workforce fields. The college serves approximately 4,500 students, and is a pioneer in embracing technologies that help keep the institution efficient, keep its operating costs low, and enable it to provide the highest levels of services to its students.

This is why the school decided to move from cumbersome and inefficient fillable PDF based forms to a modern eForms with Workflows tool and a decision was made to find the best option available in the market.

WHAT WERE THE CHALLENGES?

Forms in the school were managed mostly using fillable PDFs and basic electronic forms from within existing systems, resulting in a mix of manual and semi-manual processes which were hard to manage and track.

Additionally, due to the volume of forms that users were generating, the ad-hoc nature of the processes led to significant inefficiencies, higher costs, and a lackluster user experience.

Due to these challenges, the school's technology department set out to identify an eForms with Workflows solution with these important characteristics :

- An enterprise grade eForms and Workflows system that was flexible and provided all the features to serve the needs of all departments in the institution.
- A centralized platform from which to design, deploy, and manage all the different types of eForms and Workflows.
- The solution had to include advanced functionality such as robust electronic signatures and integration with payment gateways.
- The solution needed to have a robust API to be easy to integrate with existing and future systems.

SUMMARY OF THE SOLUTION

After evaluating several of the top solutions in the market and considering the experience the school had of many years using the Docubase Information Suite from **dbS Software and Services**, they decided to implement **dbS LiveForms™ PRO** eForms with Workflows solution.

The implementation began by identifying the main use cases to begin the project with. For this, PJC selected the top 3 most complex forms and workflows that presented them the biggest challenges to solve using their old PDF approach. These included:

1. The institution's employment application.

Previously a PDF that had to be downloaded and filled out by applicants, the HR department's main issue was that applicants would turn it in without it being completed properly, so many of the applications could not be processed. The new eForm needed to guide the applicant through filling out the correct fields, and only allow submissions that were completed including with the mandatory attachments.

2. The student residency verification form.

Previously a paper form that required students to navigate through many questions and follow written instructions for the logic on how to fill it out. Filling out this paper form presented unique challenges that resulted in a high rate of errors in submissions. For this reason the new eForm needed to model the complex logic in the form itself so that users could be guided through filling it out without any errors.

3. A completely new policy adoption/modification request form.

As part of its internal compliance process, the school defined a completely new eForm with Workflows from the ground up, to allow the executive heads of the college to propose new policies or modify existing policies using a well defined and documented process. This form needed to allow users to upload documents for review, and have them routed to each of the department heads. It also needed to capture electronic signatures from each department head.

With the initial use cases defined, the dbS team created drafts of each of the new eForms with Workflows inside of the PJC LiveForms environments (with PJC staff participating in the process for hands-on training), and once completed the new forms were made available for testing by PJC.

The design of the drafts were completed in a matter of days, and the testing ran in cycles which included users from each department to tweak the eForms and Workflows and ensure the desired functionality.

Creating these new eForms and Workflows with dbS LiveForms provided PJC a completely new way to quickly deploy fully functional solutions to their most pressing form needs. The deployment process led by dbS experts also provided the PJC forms team with valuable hands-on training which enabled them to hit the ground running in designing their own additional new eForms and Workflows.

Since deploying the initial 3 forms, PJC has quickly ramped up and designed dozens of new eForms with Workflows, leveraging the knowledge they acquired during training and backed up by dbS concierge level technical assistance provided as part of the LiveForms subscription.

With the solution in full production, the teams are now working on implementing additional integration points using dbS LiveForm's API to deliver completed forms to PJC's Docubase ECM and further improve the flow of information from/to other systems like the SIS and CRM.

ACHIEVED BENEFITS

With dbS LiveForms™ PRO, PJC has eliminated the need to use fillable PDFs and manual processes in multiple use cases across the entire campus. This in turn minimizes the need to use paper and manual processes to provide services to users, thereby reducing operating costs and achieving a very fast ROI.

ACHIEVED BENEFITS

Key benefits achieved by implementing dbx LiveForms™ PRO:

- Ability to move away from fillable PDFs and manual workflows
- Single platform from which to design, deploy, and manage all types of eForms with Workflows for users across the campus.
- Cost-effective solution for electronic forms of all types of forms, including capturing payments and electronic signatures.
- A scalable solution that can be used by users on a departmental basis.
- An enterprise eForms with Workflows solution that can be easily integrated with other systems using API connections.

DEPLOYED SOLUTION FEATURE SET

- dbx LiveForms™ PRO with drag-and-drop forms designer, workflows, and business rules engine.
- Docubase Education Suite PRO (previously deployed at PJC).
- Forms design and solution support from the dbx expert team.



"We really wanted to find a solution that could address all of our use cases, and so far dbx LiveForms has been able to handle everything we have thrown at it. We're very pleased with the solution and the support provided by the dbx team"

~ Sebastian Barron, VP of Technology, Paris Junior eCollege