The Beginner's Guide to

eForms and Workflow Automation in Higher Education

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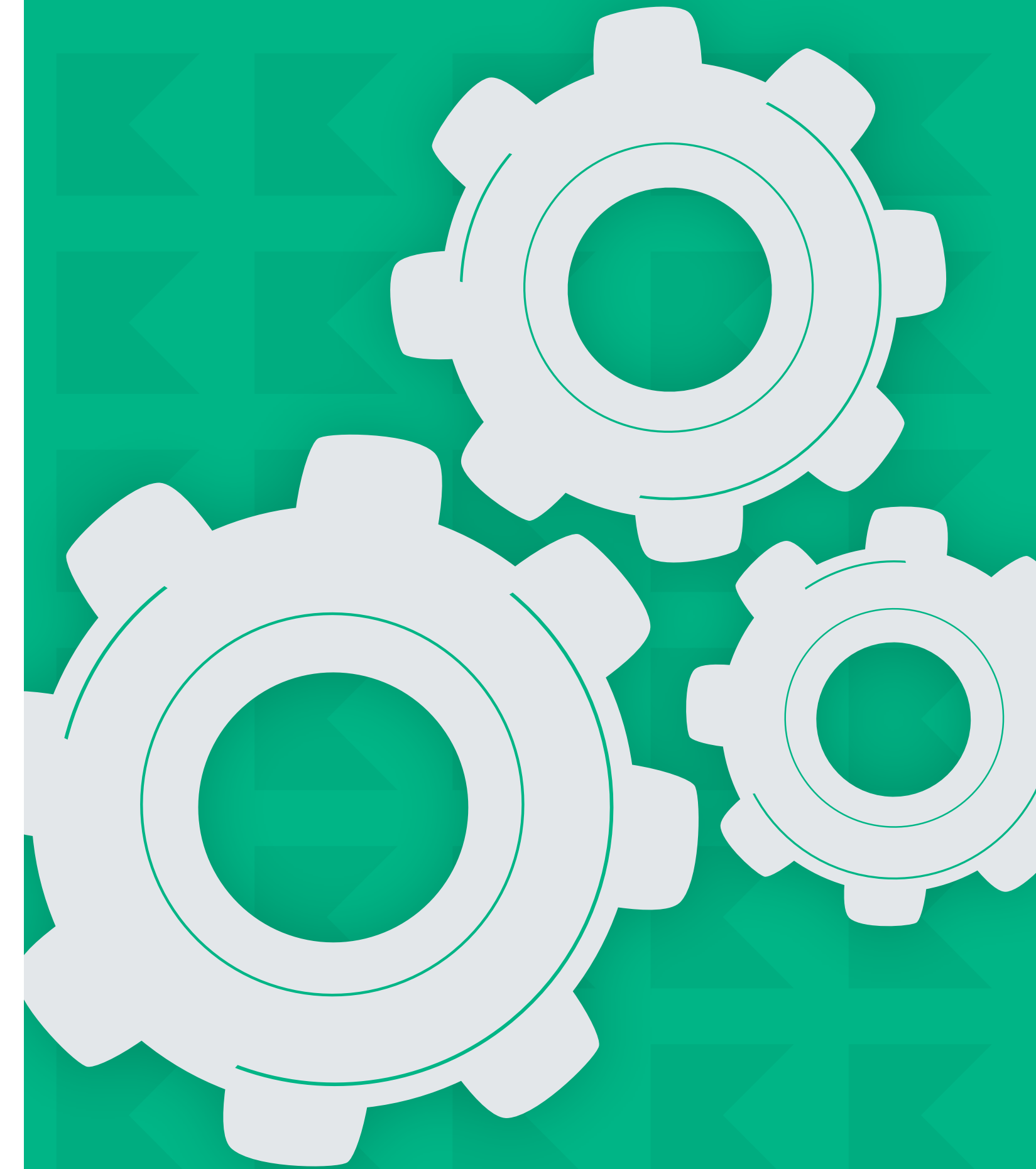

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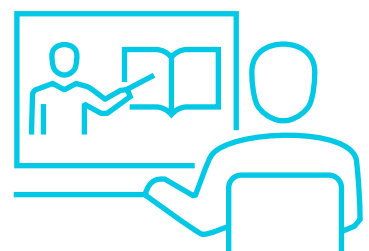When higher education departments shift to remote work, they must also cope with the challenge of doing much more with much less.

Technology has made its mark on higher education. With technological innovations emerging every day, more institutions are embracing automation to streamline processes and manage the copious amounts of data swirling around on campus. With the unforeseen events of 2020, universities have been quickly forced into an unprecedented transformation, shifting to working and teaching remotely. This agile change required immediate re-evaluations of traditional processes like faxing, scanning, and passing paper files. Going remote — or being forced to go remote with very short notice — ultimately requires process management tools to support levels of agility demanded by the current climate.

When higher education departments shift to remote work, they must also cope with the challenge of doing much more with much less. The scope of work hasn't changed; in many cases, it has only increased as institutions navigate remote learning and shift operations from in-person to online. Departments still need to produce, send, and file forms like applications and budget requests, which may contain proprietary information. However, in a remote environment, these forms must be sent digitally. Gone are the days when a faculty member can drop off a stack of forms at their dean's office.

Changes like these underscore the importance of process automation in higher education. According to a survey by EDUCAUSE, institutions are re-evaluating workflow processes because of remote work, including an increased consideration for workflow automation technology. One survey respondent noted they have experienced "the push to leverage existing technology resources/investments" and "the drive to modernize and streamline business processes" since working from home.

Implementing workflow automation technology can seem like an insurmountable challenge for higher education departments who have historically worked with legacy systems, paper, and PDFs, but there are many benefits to making the switch:
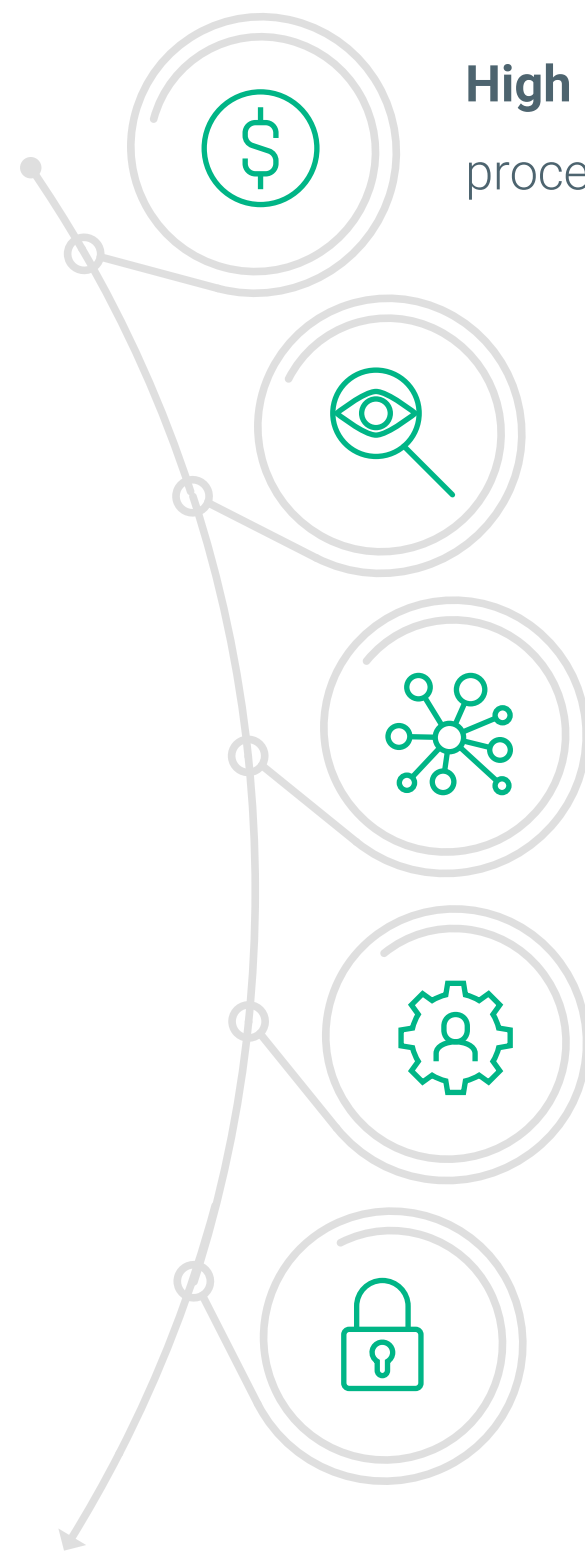
High return on investment: Technology takes care of much of the busy work plaguing departments. Without the need to manually file and process forms, departments can get their time and resources back, allowing them to focus on advancing the mission of their institution.

Enhanced transparency: Workflow automation software offers informative reporting capabilities and increased visibility into the workflow steps to help institutions gain insight into process status, giving them the knowledge to optimize processes.

Increased agility: Institutions will be better equipped to respond to market demands and changes, such as quickly moving to remote learning and working.

Better data security: Workflow automation technology offers much more security than traditional paper and PDF processes. With controlled access and data encryption, private information is kept safe.

More efficiency and productivity: Workflow automation technology gives users the tools and ability to get more done with less. Without manual data entry and minimized human error, efficiency across departments and the institution as a whole increases.

In this e-book, you will learn the cost of paper and PDF processes in higher education, solutions to this issue, and where to turn for automation assistance.

The True Cost of Paper and PDFs on Campus

Higher education administrative work tends to be heavily dependent on paper. When it comes to challenges like quickly transferring to remote work and learning, in-person forms are no longer realistic. While digital replacements like PDFs are far less costly and wasteful, they still present significant process inefficiencies.

Institutions mainly use PDFs for sharing, sending, and signing documents. While this process may suffice for simple forms or approval processes, the use of PDFs quickly falls short when forms require lots of information, specific formatting, two or more sets of approvals, and the submitted information is meant to update campus systems, like the Student Information System.

First, PDFs require manual input subject to entry errors. Often, forms must be printed and signed by hand, ultimately presenting the same challenge as paper-based processes. When completed digitally, students and faculty must still input information like campus IDs rather than this being pulled automatically from systems on campus. If entered incorrectly, the form completion quickly becomes nullified.

Once complete, PDF forms must be emailed from person to person, taking time and causing approvals to potentially fall through the cracks. Between approvals, submitters have no visibility into their submission status and departments managing the process often lack necessary

visibility to feel confident the process will be completed on time. Once complete, the information still lives within this PDF and must be manually entered into systems of record.

When sensitive data such as a student's Social Security number is sent in PDF form via email, institutions open their virtual doors to security breaches. By nature, recipients do not always treat these forms with a proper level of security, such as saving completed forms to their desktop; crucial missteps could happen anywhere along the line, making the institution vulnerable to liabilities.

[Graceland University](#) suffered a 2019 data breach where hackers accessed employees' email accounts via a phishing scam, giving cyber-terrorists an uninterrupted view of all email content — including student Social Security numbers and financial information. [The Ponemon Institute](#) reported the average cost of higher education data breaches to be $245 per record, the second highest of any industry, meaning a small liberal arts institute could suffer costs exceeding $500K for a single incident.

From start to finish, the use of PDFs is frequently subject to entry error, missed steps, security breaches, and lack of process transparency. Ultimately, these factors suck staff and faculty time and present costly risks for institutions. By shifting paper and PDF processes to eForms and workflow automation platforms, institutions can reinvest this time and budget into engaging with students to further their educational success or in producing impactful ground-breaking research.

The Challenges of Complex Automation Software

An institution's workflow challenges do not stop with a dependence on paper and PDFs. Administrators might recognize the obvious solution to their problem is automation across their department, but they may then select the wrong software option — one requiring complex coding and regular IT maintenance to function at its best. As a result, administrators struggle with the following:

GETTING BUY-IN FROM INSTITUTION DECISION-MAKERS OR COMMITTEES. Changing the status quo is difficult in higher education, especially when changes must be approved by multiple tiers of leadership.

MEETING COMPLIANCE AND REGULATION STANDARDS. Many institutions are required to use IT and technology. Finding a workflow automation solution that addresses all of these standards yet is easy enough for department leaders to use takes time and oversight.

LONG IMPLEMENTATION TIMELINES. The typical IT department has a heavy workload. It takes time for this group to get to your department's request, understand what you need, and then develop it. Additionally, IT might take time to respond to update requests in the future.

STAFF BECOME FRUSTRATED WITH NEW TECHNOLOGY. Mastering new technology is complicated, especially for staff who are not familiar with automation software or modern technology in general. Onboarding for a custom solution is time-consuming, causing frustration among staff. They might become overwhelmed with the complexities of the new system, turning again to familiar paper and PDF processes. According to a study by IDG, 51% of organizations stall or abandon their digital transformation because the change proves too challenging.

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The ROI of Automating Processes and Workflow

An ideal solution for virtually any institution as they attempt to do more with less is low-code forms and workflow automation software.

Low-code software enables anyone on campus to create powerful, integrated apps, or forms and workflow processes, without any coding required. Using drag-and-drop components and built-in approval logic, teams can easily create and launch powerful mobile-friendly, error-free processes without having to be familiar with traditional application development lifecycles. Low-code approaches let institutions quickly create, iterate, and release optimized processes in a fraction of the time required for typical IT projects, while ensuring projects meet high-quality security, scalability, and integration standards expected from IT.
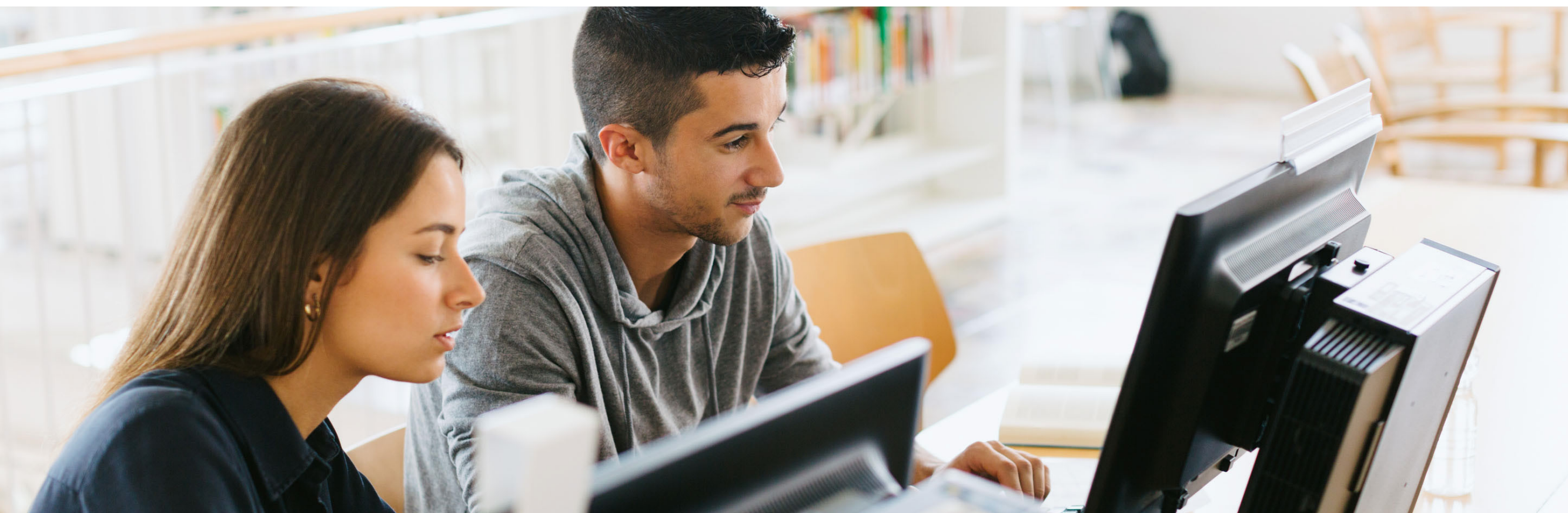
Low-code, cloud-based workflow automation platforms can improve essential functions across departments:

Reduce errors and time spent on manual processes and approvals. A report by SAP Concur and Kelton Global found that universities spend 2,000 hours per month just on manual processes like invoices and expense reports.

Break down silos across campus to improve productivity and communication.
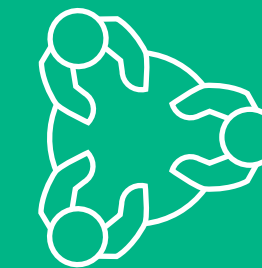
Cut expenses for legacy system IT maintenance, as well as costs like paper.

Improve visibility and meet compliance requirements with data analytics and system-wide reporting.

Implement robust security measures. In a study by SAP Concur and Kelton Global, fully automated solutions reduced higher education institutions with fully automated solutions reduced filed instances of fraud, waste, and abuse by 39%.

The benefits of switching to low-code forms and workflow automation software are invaluable. Not only does this software decrease dependence on paper and PDFs, but it gives staff and faculty time to focus on why they entered higher education in the first place. This is exactly what The University of Hawaii discovered after implementing low-code forms and workflow software. Read the case study below to learn more.

The University of Hawaii: Dramatically Decreasing Approval Time

Higher ed leaders receive hundreds of emails every day. Garret Yoshimi, VP of IT and CIO at The University of Hawaii system, is one of those leaders. A select few of the 500 to 600 emails he receives are time-sensitive requests. It doesn't take long for important approvals to get buried in his inbox. Sometimes, staff would wait weeks for approval from Yoshimi or other IT leaders simply because they were inundated with junk mail.

Using Kuali Build, Yoshimi automated the approval process. He now receives time-sensitive requests through Kuali Build instead of directly via email. While Yoshimi can turn on email notifications if needed, he can quickly review and approve requests by logging into Build via single sign-on and act on each outstanding request.

Now, Yoshimi can easily see the approval process, find attached relevant documents, and see where the process is lagging. Yoshimi also has the ability to send a request back to a specific step in the workflow. Rather than sorting through a long email thread, the workflow process appears clean and simple in Build, showing exactly where the approval sits in the process and how long it has been there.

Since automating approvals with Kuali Build in late 2019, the University of Hawaii has processed over 500 approvals and decreased the approval process from upwards of several weeks to less than 24 hours.

What to Look for in Low-Code Forms & Workflow Software

When you begin the hunt for low-code forms and workflow software, it can be difficult to know exactly where to start. There are many options out there, but the ideal software solution should address your institution's current challenges while anticipating ways to adapt in the future.

Institutions wanting to implement low-code workflow automation software should look for some of the following features:

Easy — and fun — to use

Powerful, built-in workflow and approvals

Easily integrates with critical campus systems

Built-in single sign-On capabilities

Offers increased visibility and optimization through comprehensive process reporting

Provides comprehensive data security, scalability, and compliance

Cloud-based, with multi-tenant architecture

Consistent and reliable with industry-leading service-level agreements

Has a pricing model that aligns with unique needs of higher education

Built-in mobile-ready and responsive design

What to Look for in a Vendor Partner

Who you choose to partner with is equally as important as the software you choose. Your vendor should have a strong history of approaching customer relationships as partnerships and producing results aligning with the strategic vision of their customer's institutions. They should also be easy to communicate with and be available for guidance or troubleshooting whenever you need them. Your vendor should have:

An understanding of higher education goals and needs

A larger community of customers like yourself

Full transparency about costs and results

A commitment to supporting your institution, even after implementation

A goal to ensure everyone at your institution fully understands the new software

A strong background of experience

A desire to partner with you, not just gain your business
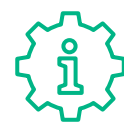
**Responsive to your requests, quickly addressing needs**

Kuali's Powerful Low-Code Solution

Kuali offers Kuali Build, a low-code eForm and workflow automation solution designed specifically for higher education. By collaborating closely with institutions for more than 15 years, we have been able to create software that helps universities accomplish their goals in ways that work for them.

Kuali Build makes it easy for anyone (no technical experience required) to create integrated, powerful forms and workflow. Build empowers staff and faculty to create and iterate upon their own solutions, while providing a platform that meets the business and security requirements set by IT.

Six Steps to Take in Your Search for Forms & Workflow Automation
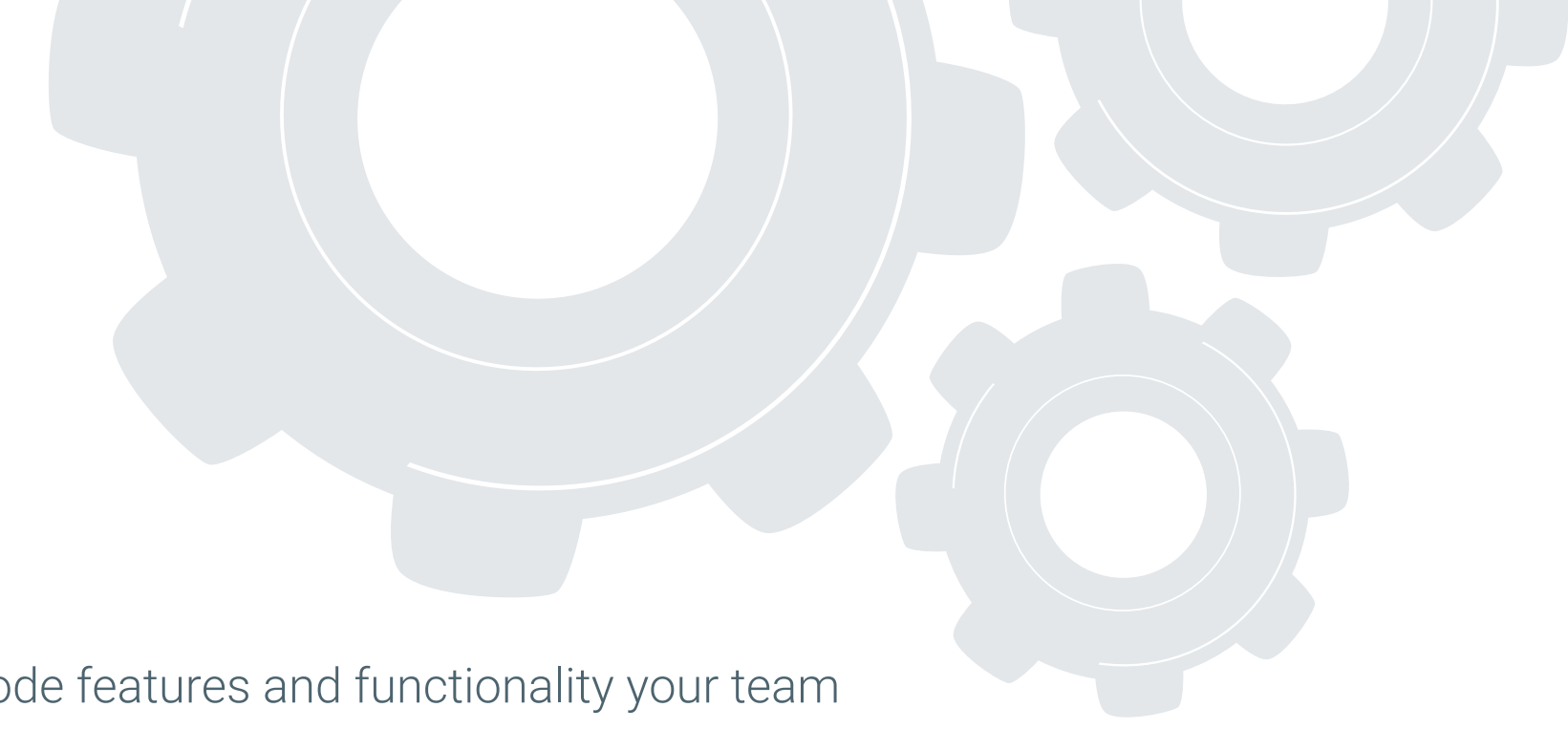
We've prepared a buying guide to support your institution's low-code forms and workflow search. The guide covers specific low-code features and functionality your team should consider. In addition, the guide dives deep on what questions to ask vendors to ensure a long-term partnership. Read more and download the guide here.

In the meantime, as you begin your search for a low-code platform, here are six initial steps you can take:

1
Identify real-world use cases that would benefit from process automation. Comparing vendor solutions to real use cases is really valuable. An important part of use cases is who is expected to create, maintain and manage the business process.

2
Do your research. There are many vendors out there, and it's important that you select the one that will be able to implement the solution within your timeline and in a way that makes sense for the whole department.

3
Ensure leadership understands the need for automation. Leaders and decision-makers at your institution should have a strong understanding of why your institution needs to implement department-based forms and workflow automation software. They should be able to clearly visualize the issues automation can solve.

4
Understand your institution's purchasing requirements and plan accordingly. Any solution you choose should be aligned with your institution's budget, compliance, security, and accessibility requirements.

5
Involve IT leadership to ensure strong and unified guidance throughout the buying process, helping you understand how a new system will affect others currently used across the university.
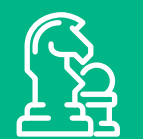
6
Create a plan for implementation and data migration. Ensure there is adequate time allotted for all decision-makers to fully understand the new software.
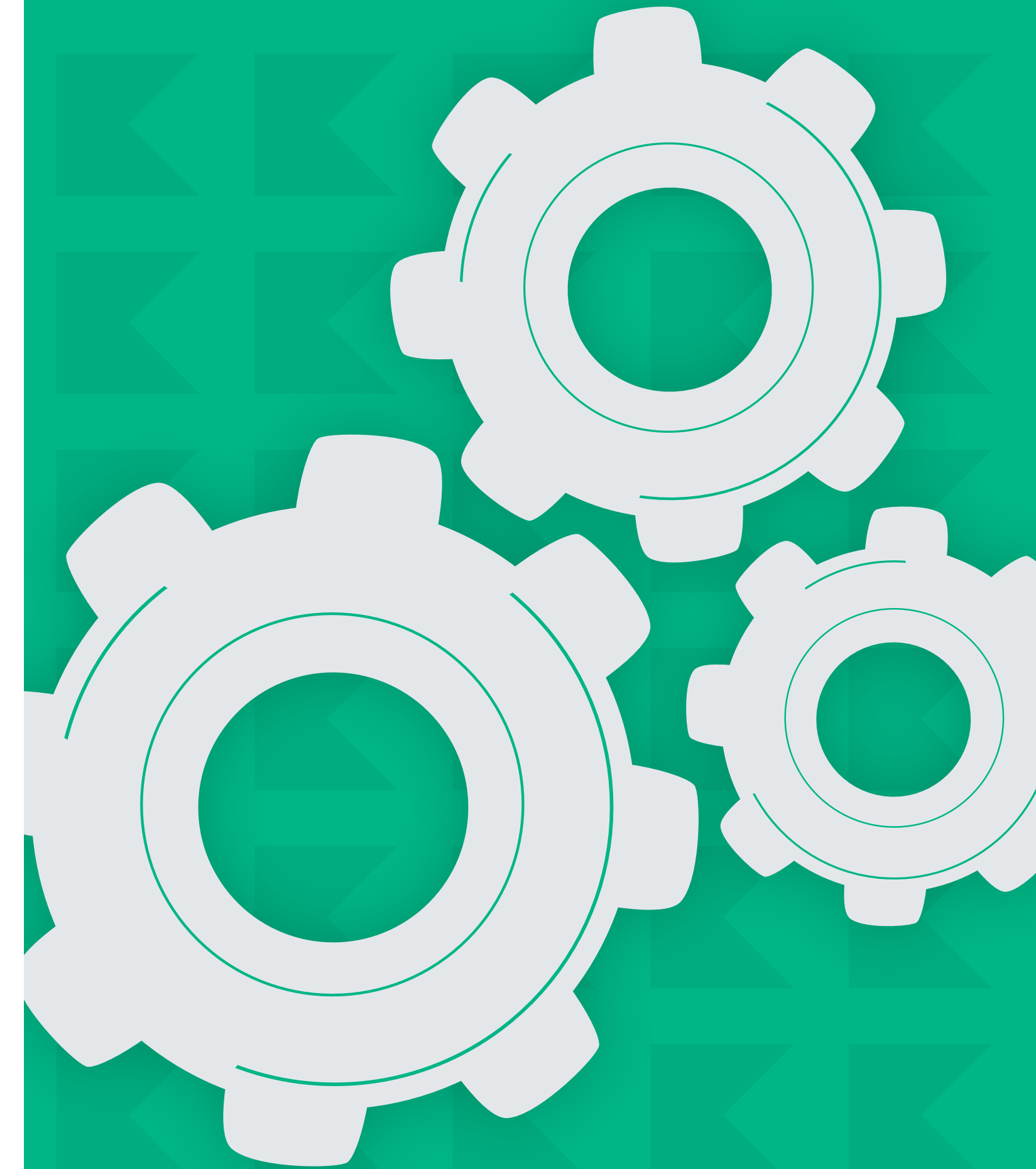
Learn More About Kuali's Workflow Automation Software

Kuali Build can transform the way your institution functions with powerful forms and workflow automation.

Kuali Build →

When you're ready to learn more, Kuali is standing by to help your institution reach its goals. Learn more about our software at Kuali.co/build or contact us today for a demo.

Request a Kuali Demo →

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