With Softdocs, Monmouth was able to process twice as many transcripts in a semester without added staff or increased costs.

"I have never once called Softdocs and not gotten the best customer service in this industry."

LYNN REYNOLDS
REGISTRAR

QUICK FACTS
▶ Softdocs customer since 2003
▶ Implemented in Records and Registration

KEY PLAYERS
▶ Lynn Reynolds, Registrar

CHALLENGES
▶ Deteriorating microfilm and cabinets of records resulting in untimely document retrieval
▶ Tedious, time-consuming and costly transcript request and delivery process
▶ Students burdened with paper-intensive forms

SOLUTIONS
The Softdocs ECM Platform:
▶ Electronic request and delivery of transcripts
▶ Integrated e-forms for students
▶ Electronic access to files

MONMOUTH UNIVERSITY

WEST LONG BRANCH, NEW JERSEY

Founded in 1933, Monmouth University is a private university located in West Long Branch, New Jersey. Monmouth enrolls about 4,600 undergraduate and 1,750 graduate students. Monmouth's diverse programs of study and small classes foster a close-knit community of teaching, scholarship and collaboration.

Army surplus cabinets full of records used to fill the storage room of Monmouth University's Records & Registration office.

Years of paper documents and microfilm were beginning to deteriorate and it became difficult to retrieve documents in a timely manner.

When Registrar Lynn Reynolds attended the Datatel Users Group Conference (now known as Ellucian Live), she found a possible solution with Softdocs. "We were very impressed with Softdocs' ECM Platform, but even more impress-ed with where the product was going," said Reynolds. "The product filled our immediate needs, but the vision Softdocs had of what it could be in the future was exactly in line with what we wanted to do."

They traveled to Softdocs' main office in Columbia, SC and visited a few customers in the area who could provide first-hand knowledge of Softdocs products.

"Our first priority was to get all of the current students' documents into the system. We couldn't work with some documents in the system and some documents still in physical folders," said Reynolds.

By the end of the semester, all of the current students' documents were scanned and indexed into the con-tent management solution. Immediately after, they implemented Softdocs' Print Customization solution, which processes print data from Ellucian's Colleague into clean, customized documents. To complete the Softdocs Platform, Monmouth added their electronic forms and workflow solution.

"Softdocs' Electronic Forms and Workflow solution was a staged implementation," said Reynolds. "First, we had forms that would go directly from the student to registration for final approval. From there, we built a second routing step and another and another until we had the full approval process in place for each document."

Originally, Monmouth chose 13 forms to implement: FERPA, changes of address and name, and other forms that didn't need a second level of approval.

Now they've taken so many forms paperless that they've been divided into two groups: student-based and advisor-based. Advisors can fill out forms for student substitutions, late withdrawals, grade changes and more. But their big winner, said Reynolds, was the transcript process.

Transcript Processing

Prior to the implementation of the Softdocs platform, students had to complete a paper form to request a transcript. This form was a four-part layered document, so the student filling out the form would need to make sure their writing transferred from the top all the way to the fourth copy. The chances of a student writing hard enough to get to the last page was "one in a million," according to Reynolds.

Registration and Records staff would have to decipher the students' handwriting and hand-copy the data on the additional forms. They would then process and distribute the transcript and the request copies to various destinations. The entire process was very tedious, time-consuming and costly for the department.

Monmouth students can now easily fill out a transcript request in the electronic forms solution, where their student ID, name and other pertinent data is pre-populated from Colleague to eliminate errors. Registration approves the request and prints the student's transcript with the print customization solution.

The transcript and request are automatically filed into the content management solution in the student's electronic folder. Softdocs' eDelivery™ module allows Reynolds and her staff to email students their transcripts, providing significant cost savings for the department. "With eDelivery, we don't have to produce the paper copy, so we don't pay for the paper. We don't have to pay for the envelopes, stamps or time spent stuffing envelopes," said Reynolds.

That time savings and the ability to electronically access the permanent record cards has allowed the department to process twice as many transcripts requests—1,261 in a single semester compared to 656 transcripts previously without adding additional staff or increasing costs for the department.

"The whole platform has been tremendously helpful in processing transcript requests, especially the content management solution," said Reynolds.

"We don't have to walk upstairs, dig through all the cases, find the document, copy it, and return it to the right case— we just have to find it in the content management solution and print it with Softdocs' Print Customization solution ."

Softdocs' Electronic Forms solution has also been a huge success for their students, who no longer have to run around campus with crumpled-up forms looking for signatures.

"Students are our customers," said Reynolds. "So from a customer service perspective, being able to handle documents this way is a huge benefit to them and the university. We have to be user-friendly. Students don't want to deal with paper or run around campus. They want to be up at 3 a.m. filling out their forms, but I don't want to be up at 3 a.m. processing their forms. So the electronic forms solution helps us adapt to what the students need while still being usable for us. It empowers the student to do business with the university."

Implementation

Reynolds also had a great experience during their implementation.

"People need to realize—the more time you take to set up the platform in the beginning, the more it will save you in the long run," said Reynolds.

"You don't realize how much more it can take to correct a mistake than to do it right the first time. Softdocs was extremely helpful in making sure we were getting the best out of our software. You can't go with what you have, you have to re-engineer it to what you want it to be. With the Softdocs ECM Platform you can do it a better, different way."

Reynolds also said the Softdocs team's knowledge in their field helped her as well. Prior to 2003, her department had not been well versed in document imaging, but she says Softdocs helped them grow in technical knowledge while fostering their own growth in knowing what the customers need.

Softdocs offers all its customers an ongoing support relationship, which Reynolds found amazing. "It's a bunch of us Jersey girls with those Carolina boys, and we have an awesome working relationship."

"They are the most responsive and professional people. They get the job done every time."

ABOUT SOFTDOCS

Softdocs is a privately-held software company focused on the development, implementation and support of enterprise content management, electronic forms and workflow solutions for the education marketplace.

With a next generation, fully browser-based platform, Softdocs' solutions integrate directly with existing ERP solutions. Institutions are able to eliminate the need for paper-based records and processes institution-wide from student records, finance, human resources, and beyond.