

The foundation of any successful implementation is a discovery tailored for your institution.

“Customer service with Softdocs is excellent. I don’t know of anybody that is better than Softdocs whenever we called for assistance with our print solution.”

ANITA CRUNK

ASSISTANT DIRECTOR OF FINANCIAL SERVICES

QUICK FACTS

- ▶ Softdocs customer since 2003
- ▶ Implemented in Admissions, Registration, Accounts Receivable, Accounts Payable and Purchasing

KEY PLAYERS

- ▶ Michael Wingle, Associate Vice President of Information Technology
- ▶ Anita Crunk, Assistant Director of Financial Services
- ▶ Melonie Kilby, Registrar
- ▶ Kim Barfield, Purchasing Agent

CHALLENGES

- ▶ Lack of workflow functionality
- ▶ Multiple time-consuming, paper-intensive processes

SOLUTIONS

The Softdocs ECM Platform:

- ▶ Shared access to electronic documents improved efficiency



WILKES COMMUNITY COLLEGE

WILKESBORO, NC

In the foothills of the Blue Ridge Mountains resides Wilkes Community College, a member of the North Carolina Community College System. Wilkes is a public, two-year institution that employs 250 full-time faculty, staff and administrators, many of whom have worked there the majority of their careers.



Wilkes was not only looking for a better solution, but one with better customer service.



The mentality had been consistent for many years. Wilkes' answer had always been to use more paper.

Although some at Wilkes may seem resistant to change, their Information Technology

staff made certain they were never behind in the world of document management. After dealing with the constant issues with their previous two solutions, Michael Wingler, Associate Vice President of IT at Wilkes, and others felt it was time to look for something different.

"I wanted to improve workflow, automate some of the processes happening out there on campus and cut printing costs," said Wingler. "At one of the conferences we went to, I saw the mention of Softdocs and we were already using their solutions for the printing side of the house."

Wilkes began using Softdocs' Print Customization solution in 2003.

"When Michael asked about our opinion on Softdocs, I was quick to say the customer service is excellent. I don't know of anybody better than Softdocs when it comes to customer service," said Crunk.

"That was a huge thing, because with our previous imaging solution the customer service was practically zero. It is very important to have good customer service when you have a problem and you're in the middle of a work issue."

Both Wingler and Crunk have been with Wilkes through its implementation of two prior document management systems. After seeing an on-site demonstration, both were excited to expand the use of Softdocs to other parts of the college.

"Just from an IT side it looked like the management and support was folds better than what we had been experiencing from the other vendor," said Wingler.

"The big thing was our professional services consultant coming in and conducting our discovery. He came in knowing the Softdocs product, but he also knew the Colleague side and workflow from different departments. He was able to explain, train and convince both the senior and new staff. to change their workflow to better the college."

"He knew the questions to ask us," said Crunk. "We might not have known what to tell him, but he knew the questions to ask to drive us to tell him what he needed to know."

As a former IT business analyst herself, the current Registrar at Wilkes, Melonie Kilby, agreed the discovery was extremely successful.

"He did a very good job at requirements gathering which is why we're able to use it as well as we do now," said Kilby.

Student Services

Once Student Services discovery was complete, an implementation plan was created specific to the needs of each office. Softdocs' Content Management solution was first implemented in the Registration and Admissions areas, two of the more paper-intensive offices of the college.

"The mentality in our office had always been 'paper, paper, paper'...The more paper, the better," said Kilby. Before using Softdocs for document management, Kilby explained how frustrating it was when information was needed on a student and another employee had their file.

"We lost files or we couldn't find files and that was very, very difficult—especially if we were talking to a student."

Since the implementation of Softdocs' Content Management solution, everyone has the access they need at any time. As the Registrar's office learns to cut back on their use of paper, their next project is implementing Softdocs' Electronic Forms solution along with the rest of Student Services. "By this time next year, I want e-forms up and running with at least half a dozen forms or so," said Wingler.

Business Services

After seeing the discovery and implementation process for Student Services, Wingler said he learned aspects along the way that were helpful when the Business office implemented the print customization solution six months later.

"I instructed them to put some of their forms and workflow processes in an envelope and have it ready so when Softdocs came on site they didn't have to remember what they did at a certain time of the fiscal or financial year," said Wingler.

As prepared as he felt the Business office was, Wingler was still uncertain about how certain employees would take to doing things electronically.

"Going into this project I would have probably placed money on a senior Purchasing Agent, who has 27 years here, as being one of the users to be the most difficult to convince of this solution," said Wingler. "She's probably one of the ones who has taken to it the best. It has eliminated a lot of her physical paperwork."

Purchasing

Having been around for the first two document management systems, Kim Barfield, Wilkes' Purchasing Agent, is familiar with change and the good and bad that can come along with it.

"Most of the time with new systems, it's just a lot of change and not a lot of benefit. This one has been a total benefit," said Barfield. Softdocs took the Purchasing department from printing six purchase orders (POs) down to one.

"Things are a lot smoother now. This is the middle of June and is the most I have ever been caught up with at this point. We're closing our fiscal year and I have never been able to go ahead and start working on next year's things like I have this year."

Before implementing Softdocs, Barfield had to walk across the entire campus delivering copies of POs to other departments. Now one vendor form is produced, the originator's copy, and offices requiring the documentation have access to the content management solution for viewing.

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.