

With Softdocs, Dawson County Schools added valuable hours back to their schedule and space to their office.

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JAMIE ULRICH

DIRECTOR OF FINANCIAL SERVICES

QUICK FACTS

- ▶ Softdocs customer since 2012
- ▶ Implemented in Payroll, Finance and Student Services

KEY PLAYERS

- ▶ Jamie Ulrich, Director of Financial Services

CHALLENGES

- ▶ Time-consuming payroll process
- ▶ Misfiled, lost and deteriorating documents
- ▶ Slow, inefficient AP approval processes

SOLUTIONS

The Softdocs ECM Platform

- ▶ Drastically reduced the turn-around time in approval processes for travel, transportation and bus requests
- ▶ Automated AP processes to electronically print and distribute checks
- ▶ Electronically stores digitized student records through its records conversion services



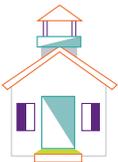
DAWSON COUNTY SCHOOLS

DAWSONVILLE, GA

Located just 40 miles north of Atlanta near Lake Lanier and Amicalola Falls, Dawson County Schools is close to some of the best outdoor spots in Georgia. This growing community has eight schools and approximately 3,500 students.



Outdated and drawn-out payroll processes led Dawson County Schools' Director of Financial Services, Jamie Ulrich, to search for a way to become more efficient.



After speaking with one of their financial review auditors, it was suggested that Ulrich look into Softdocs and its solutions because of their existing integration capabilities with PC Genesis.

After an initial demonstration of the Softdocs ECM Platform, Ulrich quickly realized that Softdocs could not only improve their existing payroll processes, but also had the capability to transform Dawson's entire record-keeping system with electronic document management.

"We were already working hard, so we knew we needed to work smarter. Softdocs became the solution that allowed us to handle all of our paperwork in a smarter way."

Dawson purchased the full Softdocs platform in January 2012. Implementation and training began shortly thereafter, and they immediately saw improvements and the return on their investment. Initial feedback from employees was overwhelmingly positive.

Payroll and Accounts Payable

Prior to Softdocs, Dawson's payroll process took nearly five hours to complete and produced over 600 printed documents. Now, Financial Services is able to deliver direct deposit notices and check copies electronically to all employees. Employees can view pay stubs at their

convenience through the district's secure online portal, eliminating printed copies and replacing them with easily accessible electronic versions.

In addition, the Financial Services department is able to allocate their time saved to other valuable tasks.

"There's no paper in our department. That means that documents are not lost. It's all saved and filed electronically with minimal manual intervention."

Dawson also worked with the Softdocs team to create a streamlined process using all components of the Softdocs ECM Platform for their accounts payable process. Now, teachers, bookkeepers and other personnel fill out an electronic purchase requisition within Softdocs' Electronic Forms solution, which routes to a designated approver. The request is then reviewed and approved or denied with the click of a button.

Once approved, the purchase requisition data is entered into PC Genesis to create a purchase order. Electronic copies of the requisition and purchase order are automatically filed into the content management solution and indexed appropriately. A copy of the purchase order is then electronically delivered to the vendor via fax or email. Upon receipt of the order or services, the final invoice is matched and the payment is processed. All final documentation is electronically stapled and filed, creating a complete, electronic purchasing packet.

Student Records

Before Softdocs, Dawson was storing decades of microfilm and paper files of student records in filing cabinets. Microfilm records from the 1960s and 1970s were beginning to deteriorate, so in order to preserve the records the district decided to take advantage of Softdocs' records conversion services. Softdocs created digital files of both the microfilm and paper records.

Once the archived records were converted to electronic documents, Dawson County was able to upload and archive them to the content management solution, freeing not only physical space but saving valuable time by removing the need to search through the physical files and microfilm when records are requested.

"We had more than 20 fireproof file cabinets in our office alone," said Ulrich. "Now we only have three."

E-Forms

Making the switch from paper request forms to electronic forms has allowed Dawson to effectively use the electronic forms solution for everything from travel requests to transportation and bus requests. Converting to e-forms drastically reduced the turn around time in the approval process. Administrators receive notifications of form submissions immediately and are able to approve or deny requests quickly and easily.

"Softdocs helped us look at our processes internally," said Ulrich. "As we've implemented each component of the Softdocs ECM Platform, we've been able to adapt and improve our workflows."

Dawson has also implemented new employee onboarding within their HR department. This additional electronic process allows Dawson to issue, receive and file teacher contracts without printing physical copies.

Looking to the Future

The Softdocs ECM Platform has made almost every area of Dawson's day-to-day operations more efficient. Ulrich, though, sees more room for improvement.

"I feel like we've only hit the tip of the iceberg with Softdocs. There are so many other areas where we can apply their software solutions and make our operations more efficient," she said.

Ulrich insists that Softdocs has played an important role in improving Dawson County Schools overall and encourages other districts to look towards them as a model.

"I would tell other districts to come here. We'd love for them to see what we've been able to do with Softdocs."

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.