Softdocs

Enterprise City Schools is saving more than just paper with Softdocs–they are saving their Finance department valuable time, money and resources.

"Documents don't get lost anymore. I have everything where it is easily accessible and tracked."

AARON JONES
PURCHASING AGENT

QUICK FACTS
- ▶ Softdocs customer since May 2014

KEY PLAYERS
- ▶ Brian Stewart, Chief School Financial Officer
- ▶ Aaron Jones, Purchasing Agent

CHALLENGES
- ▶ Time-consuming, manual business processes
- ▶ Delays throughout the approval process
- ▶ Lost, damaged and misfiled documents

SOLUTIONS
The Softdocs ECM Platform™
- ▶ Electronic forms reduce approval and processing times across multiple departments
- ▶ Print customization with eDelivery is reducing physical printing of purchase orders
- ▶ Electronic document management securely stores electronic files and documents for easy access

ENTERPRISE CITY SCHOOLS

ENTERPRISE, AL

Enterprise City Schools is located in the southeast corner of Alabama, with 11 schools and nearly 7,000 students.

The sheer volume of paperwork processed daily was quickly overwhelming the book-keepers, principals, superintendent and staff of the district.

After attending a local ASBO conference and learning about paperless workflow and electronic document storage, Enterprise became intrigued by the idea of getting away from paper. As Enterprise began the search for a solution, their biggest concern was finding a product compatible with their existing finance and accounting system, NextGen by Harris. Enterprise evaluated several options, ultimately selecting Softdocs.

"Being able to have an electronic routing and storage system that imports to our existing finance and payroll system saves us from having to manually type all the data into purchase orders. It is absolutely amazing," commented Aaron Jones, Enterprise City Schools' purchasing agent.

The transformation of Enterprise's workflows since implementing Softdocs has been nothing short of amazing, according to Jones.

"We're saving so much of our time and resources because of electronic document managemen. We're now able to focus our energy on addressing needs and tackling projects that were being ignored."

Before Softdocs, the central district office was overrun with paper transfers between all the schools in the district. Even with a paper courier in charge of deliveries, documents often ended up damaged in transit or lost altogether.

A steady stream of paperwork kept the courier busy with constant deliveries back and forth. Enterprise's previous purchase order approval process took, on average, five to seven days, which was problematic for time-sensitive orders. Teachers would run out of ink for their printers and often use their own funds to make purchases rather than wait an entire week to get the purchase order approved. Custodial and maintenance staff were also affected. Staff would be forced to put off repairs when orders for parts and supplies were stuck in the approval process.

With the introduction of the Softdocs ECM Platform, Enterprise has transformed its Finance department and reduced their AP approval and purchasing process time to two days or less.

"Documents don't get lost anymore. I have everything where it is easily accessible and tracked," said Jones. "I can search, pull and work on the documents within the application as I need it."

Other employees have taken advantage of the flexibility of the Softdocs ECM Platform as well. Administrators can give approval and electronically sign purchase orders and different request forms on their schedules, whether in the early morning in their office or late evening at home.

The piles of physical paper no longer exist at the district office. In the five months since implementation, Enterprise had already used the electronic forms solution for over 2,500 purchase orders. Jones said that electronic purchase orders have saved the district well over 6,000 sheets of paper in his department alone.

"That's also saved 2,500 documents from coming across my desk for approval," he said. "And not just my desk — the desks of other central office administrators, school principals and other supervisors, too."

"Softdocs' Electronic Forms solution is logistically so much easier for us as a district. Gone are the days of misfiled forms and waiting weeks to hear back about approvals."

While Enterprise originally purchased the Softdocs ECM Platform to improve their Finance department processes, they have also benefited in ways they didn't expect.

Personnel and Payroll have implemented electronic forms for professional development requests, disciplinary notices, travel requests and several other custom e-forms in development.

Overall, everything is faster and easier for teachers and administrators. The transition to Softdocs was also much easier and quicker than Jones anticipated.

"I never told a single principal how to use this system. I gave them their login information and a web address. We started practicing in the system and two days later we went live with it.

Our bookkeepers were nervous about the implementation at first, but now that they've been using Softdocs, they are very happy with it; especially the speed."

"We were about to hire a new janitor, but we were able to allocate some of those responsibilities to our courier since he only has to deliver papers once a week now," continued Jones. "The impact of saving the cost of an additional salary was tremendous for us."

Because of the great success they've had so far, Enterprise plans to continue working with the Softdocs team to implement their software solutions in other departments.

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.