

# Long-term Doc e customer makes the move to Etrieve and experiences the next generation of Softdocs—enterprise-wide.

## QUICK FACTS

- ▶ Softdocs customer since 2005
- ▶ Implemented throughout the registrar’s office, advancement services, human resources, financial aid, financial services, student accounts, student development, cashier, School of Theology and Christian Ministry, academic affairs, media, information technology, Center for Student Success and School of Graduate and Continuing Studies.

## KEY PLAYERS

- ▶ Dennis Seymour, Chief Information Officer
- ▶ Bary Cruz-Reyes, System Programmer/Analyst
- ▶ Lisa Wilson, Applications Services Support

## CHALLENGES

- ▶ Paper documents taking up valuable office space
- ▶ Need for file storage became increasingly important as the graduate school began
- ▶ Long wait times for retrieval of content

## SOLUTIONS

### *Etrieve*

- ▶ Etrieve Content
- ▶ Etrieve Forms
- ▶ Etrieve Flow

### *Doc e Serve*

- ▶ Print Customization and Delivery



## OLIVET NAZARENE UNIVERSITY

BOURBONNAIS, IL

Olivet Nazarene University is a private, Christian, liberal arts university located in the historical village of Bourbonnais, Illinois. Established in 1907, ONU serves around 4,900 students from more than 40 states and 20 countries. With 120 areas of study, ONU offers a variety of paths for its diverse student population.



Olivet Nazarene was outgrowing itself. What they needed for office space was occupied by documents, and once the School of Graduate and Continuing Studies was in the process of being established, the amount of paper only continued to grow.



Olivet Nazarene University began looking for a document imaging system and found Softdocs in 2005. In the many years since implementing, the university has saved countless amounts of time, money and

frustration, now growing their implementation across the institution.

ONU found itself in a position that so many higher education institutions experience. Years upon years of manual, paper-based processes had caught up with them and were causing a lot of frustration for students and employees alike. From a basement full of decaying paper records to lengthy wait times, it became apparent that a change must be made.

### Deciding on Document Management

Prior to 1976, ONU had no enterprise resource planning (ERP) solution, which meant nothing in the registrar's office was digitized. Someone coming in with a transcript request or looking to return to school to begin their Masters, meant going down to the basement and searching for files or sifting through CD towers. Decaying paper and microfiche was something of the norm for ONU.

"Before Softdocs we had no solutions to help us manage our content," said ONU Applications Services Support Lisa Wilson.

*"Other than paper, we had a system of scanning documentation onto CDs and retrieving them with name and ID. However, soon enough we had CD towers and were experiencing the same issues we saw with file cabinets."*

ONU began its search for a document management solution with goals to build an electronic filing system and streamline the process of retrieving content, especially for the registrar's office. In December of 2005, ONU licensed Softdocs and implemented the **Doc e Suite**, Softdocs' legacy platform for document management, electronic forms and workflow as well as **Doc e Serve** for print customization and delivery.

### Doc e Suite – The Road to Paperless

Lisa Wilson has been with ONU for 22 years, but hasn't always been part of the information technology team. When ONU first licensed Softdocs, Wilson was working in student accounts with seven other faculty members. One of her responsibilities included managing rental properties, a job that involved conversations with tenants about payments that were oftentimes better done in private. This need for privacy got Wilson talking with different departments on campus.

Student accounts had a back room that Wilson thought would make a perfect office – the only issue was it was filled with filing cabinets. Determined to create her office space, Wilson started asking questions around campus and that's when she learned about ONU's implementation of the **Doc e Suite**.

"They had an electronic filing system that would be perfect for what I wanted to do," said Wilson. "So a student worker and I started working on that project and scanned all of the paper documents for the student accounts office from five four-drawer file cabinets."

Wilson looked at this as a fun challenge and began working closely with IT to learn all the possibilities the **Doc e Suite** had to offer. Soon after, she got her office.

*“I then helped move the cashier office and rental property office to Doc e Scan. We went from department to department, moving our documents to the Doc e Suite and we were on our way to becoming paperless.”*

Because of her dedication to championing Softdocs at ONU, Wilson was asked to move to IT to work to bring even more departments up on the system.

## Etrieve – Migrating to the Next Generation of Paperless

ONU was quite familiar with Softdocs after a decade of working together, so when they found out about Etrieve, IT was all in.

After 10 years with the **Doc e Suite**, ONU migrated to **Etrieve**, Softdocs’ next generation enterprise content management platform. Wilson said her team saw great value in **Etrieve’s** features and ease of use, as well as the personalized attention of Softdocs’ implementation consulting. It was especially comforting that they had worked with Softdocs on their original implementation.

With over one million documents in Doc e, ONU knew they needed a strategic plan in place. They used this opportunity as a way to not only get existing **Doc e** departments upgraded, but also roll out **Etrieve** to new departments that had not yet gone paperless.

They prioritized departments by size with the smaller areas going first. Additionally, they started to roll out new departments who were not previously leveraging Softdocs’ solutions. This allowed them to run the implementations in tandem so that the new departments got up and running on **Etrieve**, while the existing departments transferred their existing data.

As new departments took interest in **Etrieve**, they would sign up and be scheduled for roll-out. ONU’s progressive approach to an enterprise-wide implementation was both efficient and beneficial.

ONU has since made substantial strides in going paperless and has brought **Etrieve** institution-wide. They now have over 4,500 users that span the registrar’s office, advancement services, human resources, financial aid, financial services, student accounts, student

development, cashier, the School of Theology and Christian Ministry, academic affairs, media, information technology, the Center for Student Success and the School of Graduate and Continuing Studies.

## The Motive to Migrate

While ONU had seen great success with the Doc e Suite, they wanted to not only upgrade existing departments, but also continue the rollout of the solution to other areas of the institution. ONU’s motivation was mainly driven by the ease of **Etrieve’s** web-based infrastructure. With a fully browser-based and mobile-first design, **Etrieve** allows student and employee access to documents, forms and workflows from any device.

*“The web-based design of **Etrieve** has made installs and upgrades seamless. It allows us to upgrade the technology without touching each individual desktop.”*

Migrating to **Etrieve** has also made ONU’s business processes faster, more transparent and simple.

“With **Etrieve**, we are leveraging more functionality across the institution and are less divided. Employees don’t have to challenge another employee about the lifecycle of a particular document,” said Wilson. “**Etrieve Flow** provides a detailed workflow history that helps us identify bottlenecks and improve efficiencies across departments.”

Not only were there technology benefits, Wilson went on to share that the university feels more connected with **Etrieve** given its flexibility.

“We can have multiple people at remote sites looking at a document at the same time,” said Wilson.

Additionally, the time savings for ONU has been monumental.

*“When someone used to ask for a copy of this or that, we would have to scan and send, or send it through the mail. With **Etrieve**, we can have it to them within seconds.”*

Accounting must keep track of everything. Prior to their implementation, they had a lengthy turnaround time for locating records and statements – searching through folders within folders and lots of staples. Now everything is at their fingertips.

## The Implementation Process

Wilson shared that the implementation process was a time investment initially for the IT department.

*“In the beginning there was a lot of hand holding and we were talking to users daily. That is inevitable when you are changing the way employees’ daily routines work.”*

Wilson shared that some people were excited for the change, and others were overwhelmed. However, over time things settled and end users began to recognize the value.

“The end user has a different perspective from those of us in IT,” said Wilson. “During the implementation there is a lot of give and take, and communication is vital. You have to take the time to do it and do it right.”

Wilson shared that challenging departments throughout the university to provide input is especially useful during an enterprise-wide implementation. As she mentioned, each end user has a different perspective and to implement a system that works for you and your employees requires feedback.

“Etrieve keeps things consistent and ensures everyone is on the same page,” said Wilson.

## Shared Learnings for Success

When asked what advice they would share with other universities, the IT team at ONU had several valuable insights.

“If we could do our implementation over again, I would have asked end users to give a better indication of what they needed before we put it in the system,” said Wilson. “Changes are many times simple to make, but it is always better to know what their expectations are up front.”

Dennis Seymour, Chief Information Officer of ONU, also shared some insight into what he would’ve done differently.

“I would have tried to get buy in from management in different areas,” said Seymour. “I would have made sure all departments understood the end goal of migrating to Etrieve and how it will benefit the departments and school as a whole.”

While an implementation certainly takes additional work, the return on investment makes it all worth it. Once the project is prioritized, resources are aligned and Etrieve is up and going, it helps you do your job in ways you did not know were possible.

Additionally, the professional services team at Softdocs is incredibly invested in its customer base and dedicated to making the implementation process a smooth one.

Wilson spoke some about her appreciation of the Softdocs support team.

“When we have questions, I know who to call,” said Wilson. “The Softdocs support team doesn’t make us feel silly if we don’t know things, they are just super about getting us to the point where questions are answered and we have a good understanding of how to accomplish what we set out to do.”

## Looking Forward

In the future, ONU would like to focus on committing to using more forms, and also using existing forms in more efficient ways. While they have 47 forms currently implemented, not all of those are actively used. Getting staff on board to leverage them all and expanding the use of the technology to provide even more functionality is a key initiative for their team.

In addition, ONU would like to expand their use of **Doc e Serve**, the Softdocs’ Print Customization and Delivery tool.

“There is a lot more we could do with **Doc e Serve**,” said Wilson. “We would like to make our environment more developer-friendly and also create more intricate documents.”

### 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.*