

# Shenandoah University's Transformational Migration to Etrieve by Softdocs™

*"All the feedback from our end users about Etrieve Content has been extremely positive. We keep hearing how intuitive it is to use, and that it is much more user-friendly than our previous content system. Our end users are very happy!"*

## JOANNE BODINE

LEAD APPLICATION PROGRAMMER ANALYST

### QUICK FACTS

- ▶ Implemented Etrieve Forms and Etrieve Flow in 2017
- ▶ Replaced ImageNow with Etrieve Content in 2018
- ▶ Integrates with Ellucian Colleague®

### KEY PLAYERS

- ▶ Kevin E. Grant, System Application Support Specialist
- ▶ JoAnne Bodine, Lead Application Programmer Analyst
- ▶ Tamara Lapp, Software Workflow Documentation Analyst

### CHALLENGES

- ▶ Java-dependent ImageNow content system required upgrade
- ▶ Limited visibility into various processes and key information
- ▶ Need for off-campus mobile access

### SOLUTIONS

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



## SHENANDOAH UNIVERSITY

WINCHESTER, VIRGINIA

Shenandoah University was founded in 1875 and is a nationally recognized liberal arts institution. The University serves around 4,000 students each semester, across seven schools and 100 academic programs.



# Despite considerable efforts to improve inefficient processes, Shenandoah University still found themselves heavily reliant on paper forms.



They had become severely limited by their content management system, due to a restrictive pricing structure that created an annual cap on e-forms submissions. As a result, students and staff were growing

frustrated with their inability to easily submit, monitor or even access their information.

Kevin Grant, system application support specialist at Shenandoah summarized, “Our approach to e-forms and document management was proving to be no longer viable. We needed something modern.”

In assessing alternate e-forms solutions that would better cater to the needs of their institution, Grant identified several characteristics that established **Etrieve** by Softdocs as the University’s e-forms solution of choice.

*“From the beginning, it was clear that **Etrieve** would be able to integrate well with our other technologies, including the document management platform we had already purchased and were still using.”*

The University was also excited about introducing a solution with a mobile-first design that could extend anytime information access to students and staff, while making workflows highly visible through in-depth user tracking features. Migrating to a new e-forms solution would finally allow the University to extend the full benefit of electronic forms and workflows to every department, staff member and student.

*“The end-user tracking was key. With our previous e-forms solution, I had to manually build in tracking and even then, it was a best guess. Now they are always able to find what they need right away!”*

Building on the success of their deployment in admissions, the University quickly expanded **Etrieve** to the registrar’s office, advancement, accounts payable, institutional computing and Hornet Central—Shenandoah University’s student center for registration and financial aid needs.

Supported by weekly calls with Softdocs’ professional services team, Grant was able to ensure that implementation at the University progressed smoothly and on schedule.

“The ramp up was much quicker and easier than we expected,” Grant said. “The Softdocs team was especially helpful whenever I needed to overcome a hurdle ... but there just really weren’t that many hurdles.”

## Developing a Complete Enterprise Content Management Strategy

Through robust integrations between Ellucian Colleague®, **Etrieve** and other admin systems, the University was taking significant steps toward standardizing data collection, management and distribution processes across campus. In fact, they created and implemented almost 50 **Etrieve** e-forms within the first 18 months alone.

However, the University was still maintaining ImageNow, for content management, and were growing increasingly frustrated with its Java requirements. They recognized an opportunity to improve upon their overall content management strategy.

“We had to decide whether we wanted to upgrade our document management system to a new, non-Java dependent version of our current system or embrace **Etrieve Content**, which would also allow us to transition to ECM in the cloud,” said JoAnne Bodine, lead application programmer analyst.

Their decision to deploy cloud-based **Etrieve Content**, released Shenandoah’s information technology department from having to host and maintain an ECM solution, and enhanced the handoff between electronic forms, workflow and the institution’s back-end document storage system. They also gained a content management interface that end users found much easier and freed up resources typically expended on time-intensive nightly OS updates.

Due to its high volume of content, Shenandoah chose to implement **Etrieve Content** in the Office of Admissions first, supported by Softdocs’ professional services team. Following the success of this deployment, the University chose to expand their **Etrieve Content** adoption by self-implementing in other departments.

Tamara Lapp, software workflow documentation analyst at Shenandoah, explained, “Following Discovery and Training, our team really understood how to efficiently expand our deployment to additional departments. We learned exactly what we needed to do to get all of our departments using **Etrieve Content**, while Softdocs focused on migrating documents.”

With many departments at Shenandoah University now live with the entire Etrieve platform, end users are buying-in and recognizing how new features can be utilized to improve their day-to-day.

“It took our users less than a day to fully understand how things can be done through Etrieve Content. From creating bookmarks for searches to itemizing items specifically for their needs, our users are embracing every benefit, while saying only great things about the ease-of-use,” Bodine said.

*“Etrieve Content works better for our users, and they know it.”*

#### 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.*