

# Harrison County Schools migrated from Softdocs' legacy ECM products, **Doc e Fill** and **Doc e Scan**, as well as assorted third-party solutions to **Etrieve**.

*"We kept asking for things that weren't possible with Doc e, but that could be accomplished through Etrieve. Etrieve gives us a better, more flexible platform that allows us to continue to grow with the software and Softdocs."*

## TODD POOLE

TECHNOLOGY DIRECTOR

### QUICK FACTS

- ▶ First implemented Doc e in 2013
- ▶ Migrated to Etrieve in 2018

### KEY PLAYERS

- ▶ Sharon Hinkle, Chief School Business Official
- ▶ Kristina Geiselhart, Purchasing Director
- ▶ Todd Poole, Technology Director

### CHALLENGES

- ▶ West Virginia Education Information System (WVEIS) left gaps in business processes
- ▶ Felt limited by capabilities of aging technology and wanted a more flexible system

### SOLUTIONS

- ▶ Doc e Fill™ (previously)
- ▶ Doc e Scan™ (previously)
- ▶ Etrieve ECM Platform
- ▶ Serve by Softdocs™



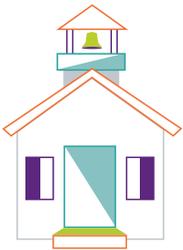
## HARRISON COUNTY BOARD OF EDUCATION

CLARKSBURG, WEST VIRGINIA

Serving around 11,000 students, Harrison County Schools includes 13 elementary schools, 5 middle schools and 7 high schools.



## Harrison County Schools partnered with Softdocs to introduce the benefits of enterprise content management within business processes across the district.



Softdocs was first introduced to Harrison County Schools in 2013 at a Southeastern Association of School Business Officials (SASBO) conference attended by Sharon Hinkle, treasurer and chief school business official. Hinkle took notice of a roundtable discussion on the topic of going paperless that was being hosted by Softdocs. Already

considering just such an initiative at Harrison County Schools, Hinkle opened a dialogue with Softdocs about paperless routing systems.

*“At the time, we had a lot of papers that needed to receive approval from many different sources. The papers were just going from one office to another office to another office to get approved. Anytime you went out of town, you would come back to find all these different papers stacked up and waiting for you.”*

To help address the paper problem that was consuming their time and attention, Harrison County Schools had been employing a piecemeal collection of solutions, but nothing which resolved the issues at an enterprise level.

Harrison County Schools made the decision to embrace Softdocs’ **Doc e** platform with the intention of automating workflows in their personnel and finance departments.

### ECM Expansion Throughout the District

Significant benefits were quickly noticed from Harrison County Schools’ utilization of ECM solutions, as electronic workflows quickly freed up time and resources district-wide.

For instance, audit requirements mandate that Harrison County Schools verify and approve each cash receipt. Whereas receipts were once manually signed and verified, **Serve by Softdocs** allowed them to auto-image and verify with a single click. Hinkle no longer had to sign her name for each receipt – in fact, receipts no longer had to be printed. **Serve** generated an image of each receipt with a pending cash receipt status. During her review, Hinkle could update each status to approved, and an activity log maintained a detailed audit trail. This meant when the auditors visited again, Harrison County School’s staff didn’t have to pull check copies, purchase orders and receipts. The auditors found everything they needed online, saving precious time and providing greater accuracy.

Like all school districts in West Virginia, Harrison County Schools uses WVEIS, an enterprise resource and planning system that is provided by the state. Prior to their utilization of Softdocs, Harrison County Schools had to print four copies of each purchase order they generated to satisfy their requirements. Through **Serve’s eDelivery** module, the district was able to distribute purchase orders automatically to the schools, reducing paper usage and the time it took to verify and pay for each order. “Using **Serve** and our **Doc e** solutions, we were able to route invoices to schools ordering merchandise and receive their approval before we issued payment,” Hinkle said.

## The Move to Etrieve

Harrison County Schools continued to find new ways to expand their adoption of ECM, further reducing their reliance on paper forms and manual approval processes. Driven by their desire to continue creating new efficiencies, Harrison County Schools began looking into the latest generation of Softdocs' ECM offerings, **Etrieve**.

"Many of the new things we were asking about doing weren't possible with **Doc e**, but with **Etrieve** we'd be able to do all of them," said Todd Poole, technology director. "We wanted to do more with forms on our own. We wanted to do more outreach to parents and to collect key information that way. We're in the process of doing all that now with **Etrieve**."

**Etrieve** introduced new functionalities to the paperless routing capabilities that first attracted Harrison County Schools to Softdocs' offered ECM solutions. Featuring a graphical workflow designer, **Etrieve** facilitated easily built and maintained workflows that were much more versatile and robust than previously allowed. Migrating to **Etrieve** also enabled Harrison County Schools to create parallel workflows, allowed content to accumulate by creating rules-based workflow suspensions and permitted PDFs or other documents to be integrated directly into their workflows. Not only are the automation of complex workflows simplified, but **Etrieve** greatly increases workflow visibility.

Seeing **Etrieve's** potential for growth into new departments and different uses, Harrison County Schools opted to recreate all their existing **Doc e** forms and processes in **Etrieve** to help facilitate a quicker launch and less potential for employee confusion. Looking back, they now encourage other schools to take a slightly different approach.

Hinkle explained, "When we first implemented **Doc e Fill**, we tried so hard to mimic our existing paper forms so our employees wouldn't become confused with the transition to electronic forms. Then, during our migration to **Etrieve**, we had everything automatically migrated over. In hindsight, I probably would have gone form to form, choosing what was most important and changing some things to make everything simpler in **Etrieve**...Our forms (in **Etrieve**) don't have to look like our paper forms used to—they can be better."

In other words, the migration process from **Doc e** to **Etrieve** allows institutions the opportunity to examine and potentially streamline their current processes and forms to aid in the creation of new efficiencies.

## Next Steps

Harrison County Schools experienced a smooth migration to **Etrieve** and are now determining how to maximize use of **Etrieve** in their daily responsibilities.

*"I think **Etrieve** is a lot easier for the staff to navigate. They have a much easier time understanding how things match up. It's just easier for everyone."*

In fact, Harrison County Schools is now looking to expand their use of **Etrieve** into additional processes, potentially eliminating their need for some other third-party programs.

"We're working to increase what we're doing with **Etrieve** now, such as doing a lot of things that might have been done in other programs. We're going to be migrating those over to the **Etrieve** platform," Poole said. "Any kind of forms that are policy-type forms that people need to sign annually, are going to be introduced in **Etrieve** because that's really the natural place for them."

### 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.*