Faced with a failing document management system, Carson-Newman University implemented Etrieve as an all-in-one ECM solution.

"We didn't have the capability to integrate other offices into our workflow process. With Etrieve, we do! That has saved a lot of time and paperwork."

DANETTE SEALE
EXECUTIVE DIRECTOR OF FINANCIAL AID

KEY PLAYER
▶ Danette Seale–Executive Director of Financial Aid

ERP
▶ Ellucian Colleague®

CHALLENGES
▶ Legacy ECM solution had declining functionality and had not been updated in years

▶ Additional departments looking to utilize document management and electronic workflows

▶ There was an immediate need due to outdated and failing technology

SOLUTIONS
The Softdocs Etrieve Platform™

▶ Etrieve Content

▶ Etrieve Forms

▶ Etrieve Flow

▶ Doc e Serve
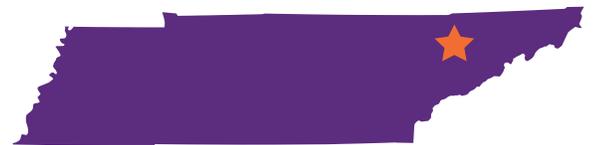
CARSON-NEWMAN UNIVERSITY
JEFFERSON CITY, TN

Carson-Newman University is a Christian liberal arts university that was founded in 1851. Currently offering a wide range of undergraduate and graduate programs, C-N has around 2,500 students enrolled from throughout the United States and around the world.

Replacing an outdated document management solution, Etrieve revitalized document management and workflow at Carson-Newman University.

It's Time for a Document Management Solution.

Prior to becoming a Softdocs customer, Carson-Newman University made the switch to paperless in 2001 after choosing to implement a document management solution. Unfortunately, over the course of the next few years, new feature offerings and updates to the product began to decline.

"We had that solution for many years. I think it was 2000 or 2001 when we started to use a paperless option. At the time it was functional for us, but over time it became less and less functional," said C-N's Executive Director of Financial Aid, Danette Seale.

With limited features and enhancements being added to the system, C-N employees noticed that their document management system was aging poorly and no longer allowed the same level of utility that it once did. Eventually they lost their ability to maintain electronic workflows and had to resort back to paper-heavy processes.

"Our workflows no longer worked, so we abandoned them. Basically our document management system became an electronic filing cabinet. Instead of putting things into workflows and working electronically, it became—let's route the paper and scan on the back end."

Frustrated with only being able to scan and access documents, C-N began looking for another solution

that would allow them to establish workflows among departments and, once again, move on from paper-heavy processes.

With the encouragement of the registrar's office and financial aid, C-N prioritized finding a replacement with increased functionality and the ability to bring new departments onboard, as occasionally required. Seale was also concerned that the forms and procedures of financial aid change from year to year, so it was important that any future solution be flexible and updated regularly.

Reliant on a document management solution running on an old server that was no longer under maintenance, C-N knew it was the right time to upgrade to a new solution.

Choosing Etrieve by Softdocs

Having previously met Softdocs at the annual SEDUG conference a few years before, C-N decision makers began looking into **Etrieve** more closely. **Etrieve** not only possessed the desired document management and workflow abilities, it could be integrated easily with their ERP and allow C-N to add additional departments, as needed. Additionally, it extended their original document management functionality by serving as a complete enterprise content management platform.

There was just the question of how to most effectively extract and migrate the 400,000 documents stored within their previous system. After assessing the number and types of documents, C-N's servers and other pertinent data, Softdocs' professional services team determined the best way to facilitate a more automated extraction, allowing C-N to see what migration would require in terms of time and resources. C-N then selected Etrieve by Softdocs to become their new enterprise content management platform.

Implementation of Etrieve

Knowing they were racing against the clock, or at least an old server, C-N worked closely with Softdocs to implement **Etrieve** as quickly as possible.

Seale remembered a very detailed meeting with Softdocs where they discussed how C-N's document flows and processes needed to be set up. Following that meeting, there were individual meetings with each office to look at processes and the type of papers that were coming and going, to establish how **Etrieve** should be used to provide the maximum benefit to their workflow and processes.

With C-N already utilizing a paperless solution, there were also thorough discussions on how to migrate stored documents to **Etrieve.** This discovery process led departments at C-N to look at each process and determine if it was still the most effective way to handle it. "There was discovery on our part as well," Seale said.

Following an expedited implementation over several months, C-N went live with **Etrieve**. For some offices, this was their first chance to utilize an ECM solution while others transitioned from C-N's previous solution. The differences in how Etrieve could be utilized, compared to their prior solution, stood out immediately to all involved. Seale believes that **Etrieve** improved the processes by which confidential information was being shared across campus.

Creating Institution-wide Automation and Collaboration

"The older solution had workflow, but it was only in our office. Something would be point of process in our office, then kick off to the next person or the next group. We didn't have the capability to integrate other offices into that process. With Etrieve, we do!"

"That has made a big impact on processing, in particular of certain items that go back and forth between student accounts and our office," Seale said. As additional offices are being integrated, with room yet for further automation, Seale is happy with where they are already. "We made a big step of getting something sent over electronically in a workflow and that saved a lot of time and paperwork."

For example, before **Etrieve** if student accounts had to send a document to financial aid, they would copy their document and send the copy through inter-college mail. Financial aid would then scan the document and file it in the student's records.

With Etrieve, this is a much quicker and more efficient process. Now when the student accounts department receives checks for outside scholarships, they process the checks directly through **Etrieve**. The electronic versions of those documents then go directly into financial aid's workflow, allowing financial aid counselors to review and revise awards as needed. "This happens in real-time. You're not waiting for someone to copy, to bring it over or pick it up. And you can see how much workflow is still remaining to take care of."

In addition, financial aid at C-N has established secure workflows throughout their department for different groups. Being able to create customizable workflows has made it possible to make sure that users only receive access and notifications for content that is relevant to them. In addition, if someone is unable to be at work, Seale appreciates the ability to check workflows, evaluate remaining work and reassign tasks.

Etrieve Increases Efficiency in Safety and Security

The safety and security department also found value in using an enterprise content management solution for the first time. The department now automates the issuance and tracking of parking tickets. After a ticket has been issued, the ticket is scanned into **Etrieve** where it is forwarded to student services and the treasurer's office. Once the respective processes are complete within those departments, the ticket returns to the safety and security department–much faster than if it had to circulate through inter-college mail.

Moving Forward with Etrieve Campus-wide

Pleased with the successes they have already realized and their close relationship with the Softdocs team, C-N is continuing to increase usage of **Etrieve Forms** within financial aid and expand to other departments across campus. With Softdocs regularly updating **Etrieve**, C-N will enjoy a viable and effective solution well into the future. C-N no longer must deal with an outdated document management solution and will reap the benefits of this expanding platform of products.