

Auburn City Schools migrated to **Etrieve**, embracing next-generation enterprise content management.

“Etrieve is so easy to use! Our employees love being able to quickly locate everything they need through self-serve, forms activity and their inbox, from whatever device they have in their hands.”

HOLLYE BECK

BENEFITS COORDINATOR

QUICK FACTS

- ▶ Originally became a Softdocs customer in 2007 and migrated to **Etrieve™** in 2019
- ▶ Currently utilize **Etrieve** in accounts payable, finance and human resources, with plans to expand into student records

GOALS

- ▶ Simplify processes for employees and students
- ▶ Stay current on best practices for data security and content management

SOFTDOCS SOLUTIONS

- ▶ Etrieve
- ▶ Serve by Softdocs™

OTHER KEY TECHNOLOGY DEPLOYMENTS

- ▶ Naviance
- ▶ NextGen



AUBURN CITY SCHOOLS

AUBURN, AL

Auburn City Schools is a K-12 district with thirteen campuses located within the city of Auburn in Lee County, Alabama. Between nine elementary schools, two middle schools, a junior high school and a high school, ACS has over 8,800 students enrolled. Student enrollment is consistently growing from year to year at a pace that is unmatched within Alabama during the last five years.



After Auburn City Schools first implemented Softdocs' Doc e solutions in 2008, the benefits of records digitization were both immediate and significant.



Encouraged by the early returns on this investment, Auburn City Schools chose to also implement a print customization and capture solution, **Serve by Softdocs**. The institution soon experienced a boost in ROI, as departments continued to reduce their reliance on paper and paper-heavy processes with the use of these complementary systems.

The ACS finance department, for example, went from printing 800 checks a month to around 30. They were also able to eliminate providing physical check copies to each employee, which decreased not only the cost of printing, but processing time. Noticing this significant increase in efficiency and savings, other departments began to incorporate the Softdocs' solutions into their processes, as well. Close to 200 boxes of personnel files were digitized within human resources, consolidating ten filing cabinets into two and greatly improving document searchability. And in accounts payable, electronic forms and workflow granted employees faster access to information and reduced processing times, as needed documents were routed to inboxes instead of through interoffice mail. Accounts payable also went from printing 500 checks a month to only printing around 100.

Advancing Content Management

In the years since their introduction and adoption of Softdocs' Doc e solutions, ACS has experienced tremendous growth, going from 800 employees to over 1,100. While the solutions readily scaled with the growth of the district, evolving data utilization needs and expectations of mobile-friendly form functionality limited the advancement of Auburn City School's usage of content management, e-forms and workflow.

While at Bridge, Softdocs' annual user conference, ACS learned of Softdocs' next generation ECM platform, **Etrieve**, and recognized an opportunity to expand the benefits of ECM. A migration to **Etrieve** would allow

the institution to improve upon what they were already doing and better adapt to changing needs. However, some remained slightly hesitant to leave a solution that was already functioning well.

"We knew we wanted to implement **Etrieve**, but some had cold feet. 'We've got Doc e Scan and Doc e Fill working, why do we want to move now?' But, we had a great relationship with Softdocs and liked what we saw with the **Etrieve** product. And to know it's ok, that you're going to move but you'll be fine—that's what helped us out a lot," said Hollye Beck, benefits coordinator at ACS.

*"With **Etrieve**, we knew that we could take another step forward and have more freedom to do things however we wanted to. If we need to change a process, with **Etrieve** that would be easy to do."*

ACS also recognized the need for a mobile-first ECM platform that would extend convenient, secure data access to their employees across varying device types. And **Etrieve's** structure would better position the institution to defend against the evolving cyber threat landscape and the growing number of accompanying threats to data security.

The Migration to Etrieve

After finalizing their decision to move forward, ACS began working with Softdocs' migration team, which has developed specific programs for upgrading educational institutions to **Etrieve**. Their first step was to engage in Discovery. During this process, the migration team and ACS assessed the on-premises capability for a reliable connection to **Etrieve**, among other things.

“Softdocs sent us out some guidelines to check our server and other technology. All of that went fine...We didn’t have any trouble with that part of migrating to **Etrieve**,” Beck said.

All existing forms, documents and associated workflows were also evaluated. ACS and Softdocs’ migration experts reviewed existing e-forms to ensure they were going to the right people for approval and considered every opportunity to improve the student experience by streamlining staff processes.

Discussions were also shared on how documents were being labeled and organized, as Softdocs and ACS explored different ways to improve upon current document classifications. Document types, number of types and areas in which documents were being used, all factored into detailed mapping that would be used to complete Auburn City Schools’ successful migration.

*“Migrating to **Etrieve** was not difficult. Softdocs worked closely with us to ensure that all of our data would appear exactly how we wanted it to.”*

This migration process consisted of two phases, the first of which included files older than a pre-selected date. With users unable to make any changes to files older than the specified data, Softdocs migrated these files to **Etrieve**. After these files were successfully migrated, came a brief freeze period, when users were unable to access or edit documents newer than the date. Once the remaining files were migrated, all that remained before going live was implementation training!

Going Live

Following implementation training, accounts payable, finance and human resources all went live, and employee forms started coming through soon after. By going live with **Etrieve** shortly before their Fall new hire season, ACS made it easier and faster for their staff, new and returning, to complete their tasks.

“Our employees have mentioned that they are able to navigate and do everything much easier than they were able to previously. Being able to utilize ECM on their phones and tablets has just made everything more convenient.”

In addition to reworking some existing e-forms to provide additional utility, ACS has introduced several new forms. “As we introduce new forms, we are making it easier for our users to have everything under one roof. We want them to be able to turn to **Etrieve** for everything,” Beck said. Departments at ACS are continuing to discover new ways that they can utilize ECM to improve communication with other departments and foster increased collaboration across their many campuses.

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.