

# Facing the higher education disruption of 2020, e-forms and workflow automation protected the Kenyon experience for staff and students.

*“Our decision to implement Etrieve ultimately prepared our ability to protect the experience of our students and staff amidst extensive, unforeseen disruption within the higher education space.”*

## JESSICA LANDON

STUDENT SYSTEMS COORDINATOR

### KEY PLAYERS & SYSTEMS

- ▶ Jason Bennett | Web Applications and Integration Specialist
- ▶ Jessica Landon | Student Systems Coordinator
- ▶ Ellucian Banner | Enterprise Resource Planning Solution
- ▶ Etrieve by Softdocs™ | Enterprise Content Management Platform
- ▶ NolijWeb | Legacy Document Management System

### QUICK FACTS

- ▶ Digitization of content began over a decade ago, with the implementation of NolijWeb
- ▶ Migrated to Etrieve by Softdocs in 2018
- ▶ Currently leveraging Etrieve for content management, electronic forms and workflow automation



## KENYON COLLEGE

GAMBIER, OHIO

Kenyon College is a residential, private liberal-arts college—nationally top ranked according to U.S. News. Central to the Kenyon experience is a 10 to 1 student-faculty ratio and a common class size of 15 students. In addition to the 33 majors and 13 concentrations that are offered, Kenyon College also provides over 190 off-campus study programs spanning more than 50 countries.

Student FTE: 1,730

Departments Leveraging Etrieve

- Academic Advising
- Dean of Students
- Office of the Registrar
- Human Resources



## Empowered by their migration to Etrieve by Softdocs, Kenyon has extended the benefits of e-forms and automated workflows across campus and into additional departments and processes.



Just over a decade ago, Kenyon implemented a legacy enterprise content management (ECM) system, taking the first steps towards completely digitizing paper files for students

and employees. Advising folders, filing cabinets and triplicate forms were replaced, as the institution shifted hard-copy student files from being housed within the Registrar's Office into a format with increased searchability and the ability to be more easily shared with other departments.

Faced with the looming end-of-life of their legacy ECM software, Kenyon sought an alternative solution that would also allow them to expand upon their efforts to deliver a seamless student and staff experience, while satisfying sustainability and green initiatives. Following an extensive search, they chose to move forward with Softdocs in early 2018.

With Etrieve by Softdocs, Kenyon's files now reside within a secure, online central repository. Through clearly defined permissions, the institution grants document access rights to specific groups, ensuring all have convenient access to needed information. Advisors can readily view advisee's files, while department chairs also have access to certain files of students who have declared a relevant major. Student service is customized to the needs of the individual, with faculty able to confirm credits and major requirements as students are being advised, and notes are uploaded and available in real time.

Going beyond document management, Kenyon also leverages Etrieve for electronic forms and workflow automation. Now, when working with students, advisors leverage e-forms to record their notes. Information is typed directly onto a form within Etrieve, which the

advisor "approves" after the meeting is over. This information is then automatically indexed within the student's file, allowing the Registrar's Office, applicable department heads and faculty members to see which recommendations the student has received.

"ECM has improved communication within our advising processes," said Jessica Landon, Student Systems Coordinator at Kenyon College. "With multiple people now able to view details in a student's folders, without having to call and request needed information, we are better positioned to provide our students with service that is both tailored and timely."

Etrieve also gives Kenyon the ability to automatically update groupings - when a student changes their major, permissions shift to anyone with a need to view the student's files, without the need to take any additional actions.

At Kenyon, academic advising is viewed as a central component to delivering THE Kenyon experience and Etrieve is quickly proving to be an invaluable tool in supporting the students' academic journey. Faculty and students are benefiting from utilizing e-forms and workflow automation, which protects the valued relationship between institution and individual, while lessening the face-to-face interactions within common business processes.

### Insulation from Disruption

As a result, Kenyon can ensure a higher level of business continuity by insulating these processes against potential disruption. While the institution highly values the importance of face-to-face interactions with students, leveraging content management, electronic forms and workflow automation has increased the institution's ability to

adapt processes to meet unforeseen challenges. Faced with the 2020 need to abruptly transition to a mobile workforce, Jason Bennett, Kenyon's Web Applications and Integration Specialist, quickly stood up e-forms to accommodate schedule changes for students wishing to add or drop classes. Upon submission, each form routed to the student's advisor before filtering to the correct inbox within the Registrar's Office, based upon the last name of the submitter. This illustrates the increased agility that Etrieve provides, and the institution can weigh whether to continue improving upon this form/procedure, revert back to prior processes, or develop a combination of both, as options going forward continue to develop.

*"With the right permissions, a computer and Internet access, you can access every file you need to see with Etrieve. Paper is being removed from processes across campus, and I'm now able to complete 95% of my work from home—if need be. That gives us tremendous versatility."*

In addition to this drop/add form, Kenyon has also introduced other e-forms as replacements to paper forms previously used by the institution.

### Online Major Declaration Form

Historically, students would have to visit the Registrar's Office to pick up the necessary forms to declare a major. The student would then complete the form before taking it to their new advisor for a signature, where it would move to the appropriate department chair for review, before being routed back to the Registrar's Office.

With some majors requiring 4-6 additional courses, departments needing to approve these for each student and a second form requiring signatures by the student's new advisor and department chair ... the process could be laborious, long and fraught with potential errors.

Today, students can simply log into Etrieve to declare their major where the form prepopulates with their student ID number and legal name. After submission, the form is

electronically routed to the relevant department chair for approval, where they can either approve or return the form to the student for more information. Upon approval, the form routes to the advisor for additional approval before being automatically shared with the Registrar's Office. A dynamic box within the form, tailored to each specific major, makes it easy for students to enter additional course information. Employees no longer have to worry about preferred names, poor handwriting or incomplete forms. The information is collected up front, automatically routed and digitally archived within Etrieve.

### Special Topics/Course Proposals

In addition to forms being submitted by students, Kenyon has implemented a number of electronic forms for faculty to utilize, including those used by the Curricular Policy Committee to propose new permanent courses, suggest changes to existing courses or submit special topics.

By leveraging electronic forms and workflow automation within these processes, Kenyon has simplified the task for faculty, while protecting both the student experience and the rigor the institution goes through to evaluate offered courses. During the 2019-2020 academic year, Etrieve facilitated 37 permanent course proposals and close to 90 proposals of special topics.

### Looking Ahead

As always, Kenyon College is committed to preserving the valuable face-to-face student time that has become an integral part of the institution's experience. They recognize the role of ECM in facilitating that experience, as well as its ability to adapt to mobile opportunities as they present themselves.

Seeking to advance their ECM utilization, Kenyon College is looking at additional opportunities to integrate Etrieve with their deployment of Ellucian Banner. Such integration would allow the institution to introduce new dynamic functionality within forms, pulling in students' schedules—in addition to student ID and name. Drop down features could also allow students to select actual classes they would like to add or drop. These conversations are ongoing, as offices across campus are examining how they can leverage Etrieve to improve the already quality service they provide staff and students.