Surry Community College digitized decades of records with Etrieve, making records more searchable and freeing up much-needed office space.

"We process all of the payments for our institution, and Etrieve has helped tremendously with the storage and retrieval of that information."

TONY MARTIN
VICE PRESIDENT OF FINANCE

KEY PLAYERS
- ► Dr. Candace Holder, VP of Technology Services
- ► Tony Martin, VP of Finance

CHALLENGES
- ► Decades of student files were taking up space and were not easily searchable
- ► Time delay associated with interoffice mail and authorization process

SOLUTIONS
- ► Etrieve Content
- ► Etrieve Forms
- ► Etrieve Flow
- ► Serve

ERP
- ► Ellucian Colleague©

SURRY COMMUNITY COLLEGE
DOBSON, NORTH CAROLINA

Founded in 1964, Surry Community College is a two-year college located in Dobson, North Carolina. While Surry's main campus is in Dobson, Surry also operates 4 centers throughout the area that offer both curriculum and continuing education classes. Average enrollment at Surry is around 3,000 students.

When business records filled a second closet and two rooms were full of student records, Surry Community College knew it was time to take a different approach to document storage and information management.

Having already heard of other community colleges in North Carolina digitizing their records, they knew what direction they needed to go. As a longtime Softdocs customer utilizing **Serve**, a print customization solution, Surry already had a great working relationship with this education-focused ECM provider.

A team was appointed to look into the possibility of document management, and they began to assess the solutions provided by Softdocs and other vendors. After reviewing the next-generation functionalities of **Etrieve**, Surry felt that Softdocs was a natural fit for their institution and could help them transform these mountains of records into more easily accessible files.

Surry's business office was the first to begin utilizing **Etrieve** on campus, with student services and continuing education not far behind. Dr. Candace Holder, vice president of technology services, shared that after seeing the successes realized by these three departments, the majority of campus wanted to begin using Etrieve.

"Within six months, Etrieve was being utilized across 90% of campus."

Basically, every department that had paper chose to utilize **Etrieve's** document management, electronic forms and workflow automation capabilities. All forms and records on the student side were digitized, and all service areas began using electronic forms. With many other community colleges in North Carolina also leveraging **Etrieve**, Surry took advantage of the networking opportunities. They were able to standardize similar forms and gain usage tips from other institutions that had also made the transition from paper-based processes to **Etrieve**.

"We use the complete set of solutions from Softdocs on a daily basis for printing, data storage, workflows and form administration," said Tony Martin, vice president of finance.

Updating Business Processes with Etrieve

Prior to **Etrieve**, key processes were manual, and data was hard copy. By utilizing electronic forms, Surry transferred the responsibilities for form completion from administrative assistants back to the individual initiating the form. Approval process timelines have decreased, as forms can no longer be misplaced or sit on someone's desk awaiting approval. "The electronic approval of our forms has increased our efficiencies," said Martin.

While outlining the various processes that have been improved through their utilization of Etrieve, Dr. Holder discussed the meaningful benefits being experienced around Surry's travel authorization and reimbursement forms. These paper forms traditionally involve a laborious approval process involving multiple touch points for authorization and somewhat cumbersome reconciliation.

Electronic forms and automated workflows have made it easier to combine related documents, bypass time delays associated with interoffice mail and ensure efficiency throughout the entire authorization process. Everything is much less complicated for all involved.

For leave requests, employees previously had to submit their request and wait days as it went from their immediate supervisor through interoffice mail to the appropriate vice president and back to the employee. With **Etrieve's** electronic forms and automated workflows, this process can take less than 30 minutes while allowing real-time updates of where the request is in its workflow.

For faculty at Surry, embracing **Etrieve** was a natural and eagerly anticipated transition from the paper-heavy processes that used to consume so much of their time. Dr. Holder said that Surry employees really needed things online and easy to find, and were impressed with the results following their implementation of **Etrieve**. In many cases, she felt that employees didn't even need much training to get started!

Martin offered this example of how **Etrieve** saves his office time, "We have to submit documentation to the North Carolina Community College System (NCCCS) for reimbursement of our construction projects. Before **Etrieve**, this was a very manual process that would take several hours to complete. The documentation would have to be retrieved from filing cabinets, scanned and

then filed again. With the implementation of **Etrieve**, documentation could be searched for and retrieved electronically and then submitted to NCCCS for reimbursement."

"Submitting documentation for reimbursement of our construction projects can be done in minutes now, instead of hours. Plus, there's no risk of misfiling the information."

What's Next For Etrieve at Surry

Surry is continuing to create new electronic forms for their students and employees to use and is constantly digitizing more records. Even with all the ways that Surry is utilizing **Etrieve's** document management, electronic forms and workflow capabilities, Martin still does not feel that they are utilizing **Etrieve** to its fullest potential and they are always looking for ways to improve their processes.

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.