

Metropolitan Community College's Decision to Migrate from Legacy ECM System to Etrieve™ in the Cloud Positioned Key Areas with Increased Agility and Business Continuity.

"After it was decided that we were going virtual, we only had five days to prepare. Fortunately, almost all of Financial Aid had been set up in Etrieve for a year and a half, which helped tremendously as we introduced electronic forms to other key areas and trained additional users on the system. Everything went much faster than we had anticipated, and we are now much further along in our efforts to go paperless."

AMANDA LANDHOLM

APPLICATIONS SYSTEM ANALYST

KEY SYSTEMS

- ▶ Ellucian Colleague
- ▶ Etrieve by Softdocs
 - Etrieve Content, Etrieve Forms, Etrieve Flow

KEY FACTS ABOUT ETRIEVE AT MCC

- ▶ 60+ Electronic Forms in Financial Aid
- ▶ 10+ Electronic Forms in Records
- ▶ 820,000 Documents Currently Managed



METROPOLITAN COMMUNITY COLLEGE

OMAHA, NEBRASKA

Student FTE: Approximately 15,000

Areas Leveraging Etrieve Include

- Registration & Records
- Financial Aid
- Student Accounts
- International Students
- Disability & Health
- Human Resources
- Payroll
- Purchasing



Metropolitan Community College's 2017 decision to begin moving key applications to the cloud not only resulted in a successful ECM migration to Etrieve, but also positioned MCC for a rapid shift to a virtual experience for staff and students during the turbulent times of 2020.

Having already shifted a number of campus systems to the cloud, passing responsibility for server and system maintenance back to their selected vendors, MCC chose to take a closer look at the legacy ECM system deployed on campus. Key departments had been leveraging this solution for some time, yet were rapidly growing disconcerted over the system's lack of quality support and limited functionality. After encountering Softdocs at Ellucian Live and learning of their Etrieve platform, two MCC departments introduced this browser-based, cloud ECM solution to their institution's IT team as a potential next-step in their institution's journey towards becoming truly paperless.

Once the decision to move from an on-campus ECM deployment to the cloud with Etrieve had been made, IT at MCC chose to embrace a phased approach to their data migration—focusing initial efforts within Financial Aid and the Office of the Registrar. Documents managed by their legacy ECM system, ImageNow, were securely and efficiently brought over to reside within Etrieve's visual filing structure, under the watchful eye of Softdocs' Professional Services team. Once users had been trained and the initial departments were comfortably live on Etrieve, phase two of MCC's ECM migration began, including the migration of Human Resources, Payroll, Purchasing, Student Accounts, International Students, Disability, and Health.

LEVERAGING ELECTRONIC FINANCIAL AID FORMS

Heavily reliant on paper forms, Financial Aid was not simply one of the first areas at MCC to go live with Etrieve for content management, but was the first to successfully rollout e-forms. Complete with dynamic code, these electronic financial aid forms greatly improved the speed by which students and employees could complete common FA processes. For example, students would often submit a form, erroneously thinking they had provided everything needed for a decision, and an entire week might pass before they'd discover that additional forms and/or documentation were required. With Etrieve, students are able to log in to Etrieve and see everything that's missing from day-to-day.

"With Etrieve, we've been able to improve-and quicken-the experience of students applying for financial aid. What was once a 4-to-6 week process for them can now be completed in one week, or even one day in some cases."

STANDING UP VIRTUAL SERVICES ACROSS CAMPUS

"We had five days to shut the school down and go virtual as part of our pandemic response. Having already implemented a virtual filing cabinet for our college with ECM, we were able to quickly stand up Records e-forms that would allow operations and services to continue, for the most part, unimpeded."

Facing the tumultuous waves of uncertainty accompanying a global pandemic, MCC turned to their deployment of ECM to rapidly extend a virtual experience to their staff and students. Top priority was setting up a few departments, including Records, with their first electronic forms. Landholm and her team successfully stood up ten new e-forms for Records before shifting efforts to support other areas. Within Financial Aid and other departments already well-established with ECM and the cloud, focus was on training users familiar with Etrieve's Auto File function how they can use other Etrieve functionality to accomplish the same tasks while working remotely and not always on the network.

Every financial aid form that has been converted to an Etrieve e-form at MCC has become more efficient, built with dynamic code and paired with workflow automation. They are capable of calculating and displaying current and previous year data, as well as pulling both into a drop-down for students to select from. And when preparing for a new year, instead of gathering outdated paper forms, modifying the PDF and reprinting over sixty different templates, MCC can simply revise each e-form in a fraction of the time and with instantaneous availability.

TAKING THE REGISTRAR'S OFFICE MOBILE-FRIENDLY

While submitting a name change request once required students to physically drop-off the hardcopy forms that would in turn be processed and archived by hand, the process is now much simpler and the corresponding databases are updated without delay.

“We’ve moved past having students turning in documentation simply to have them photocopied and returned. They’re now attaching pictures from the phones to the e-forms they submit, which has allowed us to remove copying machines/scanners from the process altogether. It’s not just faster, it’s more secure as well.”

BOOSTING PROCESS VISIBILITY IN PURCHASING

More than affecting how information is collected and processed by MCC, their decision to implement an electronic forms and workflow automation solution has directly improved the visibility of certain business processes. Supervisors have a real-time view into which documents are on each employee’s desk and even have the ability to electronically reroute workflows to accommodate sick days, vacations or a leave of absence. Landholm explained how MCC unlocked this visibility within Purchasing, without having to set up additional workflows. “A mailbox was set up to receive all submitted electronic forms for that area and handle alerting the employees when forms come in. Security was set up for each individual, but as far as workflows go - nothing needed to be set up on the individual level.”

Integrating Key Campus Systems

Etrieve is capable of integrating with a number of key campus systems, including Ellucian Colleague—MCC’s Enterprise Resource Planning (ERP) solution. In fact, Etrieve’s ability to integrate with Colleague, via direct database connection or through Ellucian Ethos, was one of the driving factors behind MCC’s decision to move forward with Softdocs and the Etrieve platform.

Through Etrieve’s Auto File, users are able to automatically index scanned or imported documents leveraging information presented on an active ERP solution screen. No manual indexing, no need to individually scan documents, and no rekeying information. Users simply scan all the documents they’d like to file within Etrieve at the same time, using ERP data as filing keys.

There are other Etrieve integration points that are making a difference for users at MCC as well. “As far as reporting from Colleague, there’s our student load, our vendor load and our employee load - which is done daily for security reasons,” said Landholm. “Then, there’s the demographics load which is leveraged to autopopulate e-forms with names, addresses and emails to help our students and staff complete the forms with greater efficiency and accuracy.” Through integration with different databases, Etrieve pulls in drop-down menus for classes, such as the need to make grade changes, greatly simplifying the process. And database lookups on a local server facilitate e-forms being automatically routed to all necessary parties for review, approval and signatures.

Measuring the Impact

Architected specifically for the cloud and use by educational institutions, the Etrieve platform not only quickly proved to be a strategic pivot from MCC's legacy content management system, but an integral cog in the campus technology stack—capable of boosting the efficiency of several key processes through electronic forms and workflow automation.

“Each one of our departments that began building the digital filing cabinet, through our deployment of ImageNow, are now live on Etrieve,” said Amanda Landholm, Applications System Analyst at Metropolitan Community College.

“However, considering the added functionality of e-forms and workflows, the impact of this solution goes beyond content management. Etrieve has introduced a new element to our institution in the form of valuable tools that any area on campus can use to become more efficient.”

UTILIZING ECM IN THE CLOUD

“Etrieve being in the cloud is a huge win on the support side for us. Our load for installs has been lessened, and user training is pretty much nil. Upon getting into the system, our users are able to quickly figure out how they can leverage it.”

With Etrieve deployed in the cloud, there is no need for IT at MCC to install hardware locally or manage on-site servers. Landholm explains that the typical install consists of setting up Auto File (an Etrieve module for batch/bulk scanning and the automated indexing of scanned/uploaded files through ERP data via integration), specifying the right Google Chrome setting and installing the correct scanner plugin. Often these steps can be done remotely, from Landholm's own desk.

For users at MCC, cloud-based ECM allows users to quickly view needed information, even share it with members of their team. And sharing information through Etrieve, following permissions and security, eliminates the need to print documents and wait for interoffice mail. It's secure, it's efficient, can be completed digitally—saving MCC both time and money.

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.