

Mobility, Convenience and Expansion Drive Lancaster County School District to Etrieve in the Cloud

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KENDRA WATTS

BUSINESS SYSTEMS COORDINATOR

QUICK FACTS

- ▶ Became a Softdocs customer in 2011
- ▶ Implemented Etrieve by Softdocs in 2020
- ▶ Leveraging Etrieve for electronic forms, workflow automation and content management
- ▶ Current deployment is in the cloud and integrated with SmartFusion
- ▶ Also utilizing Serve by Softdocs for print customization and delivery



LANCASTER COUNTY SCHOOL DISTRICT

LANCASTER, SOUTH CAROLINA

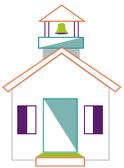
Student FTE: Over 14,000

Areas Leveraging Etrieve Include:

- ▶ Finance/Procurement
 - Payroll Processing
 - Request for Purchase Orders
 - Direct Deposit Authorizations
 - AP Processing
 - Tax Forms
- ▶ HR/Personnel
 - HR Records
 - Electronic Teacher Contracts
 - Federal and State W-4 Forms



Seeking to build upon their utilization of Enterprise Content Management (ECM), Lancaster County School District turned to the cloud and Etrieve by Softdocs.



This decision yielded several, significant benefits to the district, including the ability to support a workforce that was rapidly growing more mobile. While Lancaster CSD had been leveraging Softdocs' legacy electronic forms, workflow automation and content management solution, their migration to a cloud deployment of Etrieve better positioned district employees to more conveniently utilize this time saving, efficiency-creating functionality. "Our previous system lived on our in-house server, meaning we had to be in the office in order to use it," said Kendra Watts, Business Systems Coordinator at Lancaster CSD.

"With Etrieve, employees are able to access their documents, contracts and e-forms from home or wherever they may be. If we're ever faced with something like the pandemic again, or if I simply have to be out for a day or two, the information is right at my fingertips."

From day-to-day operations to yearly audits, an electronic content repository ensures needed information remains securely accessible in the cloud—eliminating the need to regularly pull and refile certain documents. "All of our journal entries that we do internally are scanned in. When an entry is needed by our CFO, she can find it in seconds," said Watts. "Knowing how successfully ECM is used within our Finance department, I was really excited when it was decided that Human Resources would be coming on board as well. There are so many benefits of being on the same platform."

The convenience provided by a cloud ECM solution is also evident when considering some of Watts' responsibilities as a system administrator. If an employee is having difficulty

logging in—perhaps for the very first time—to view a Teacher Contract or Direct Deposit information, Watts can quickly log in and provide assistance through Etrieve's Security portal—even from her mobile device.

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Certain processes that had not been previously digitized underwent drastic transformation once the district had successfully shifted ECM to the cloud. Payroll forms had historically relied on a courier for collection and delivery, a process that would take hours as the courier visited each school before returning to the district office. Now, within seconds of submission, payroll forms automatically begin progression through their prescribed workflows for review, approval and archival.

"Recognizing that our CFO doesn't need to see hundreds of payroll forms, we designed our payroll workflows to only route the relevant items such as new positions and things that impact our budget," said Watts. "Best of all, once a document is in a workflow, you can readily see where it is at all times. It no longer requires placing several calls to receive a status update or find a submitted document."

Leveraging Etrieve Districtwide

A longtime Softdocs customer, Lancaster CSD took their first steps towards migrating to Etrieve during March of 2020, before temporarily pivoting to address other urgent needs that surfaced during the corona virus pandemic. Migration efforts resumed in early fall and the district was live on Etrieve by late November.

One of the first goals the district had for their Etrieve deployment was the creation of an electronic payroll form to replace their inefficient and cumbersome paper forms. "We knew there were options to expand our use of purchase

order forms, but we really wanted to kick start our Etrieve deployment by implementing a payroll form—something we'd build from the ground up," said Watts. "What began as one phase of our implementation turned into a central piece of our Etrieve deployment."

Through collaborative efforts, an electronic payroll form was created and revised as certain elements were moved around. The goal: take a paper form that has a lot of information, remove any unnecessary or duplicate information and make the e-form highly functional and efficient.

Now, when a Lancaster school initiates a new hire or employee position change process, even if the funding source is changing, they do so through Etrieve. That information is not delayed on someone's desk or transported by courier between offices; it automatically routes to the district after initiating and receiving the necessary approvals at the school level. The appropriate people in the district's Human Resources, Finance and Payroll departments are included in the workflow, opening the door for greater efficiency at every stage. Having this form now digital proved to be an influential factor in Human Resources' decision to move from a separate scanning vendor to Etrieve for all employee records. Now everything is consolidated and records are available immediately after they are scanned.

"We met our goal of creating an electronic payroll form, and through the process we looked at how we were using purchase requisitions—seizing the opportunity to expand our use to fit the unique circumstances we have with special funding sources."

Reshaping the Purchase Requisition Process

Prior to Etrieve, the district had two requisitions in place, one for bookkeepers and one for teachers. The routing on both had to strictly follow a vertical flow from the bookkeeper directly to their principal or funds custodian. These Requests for Purchase Orders (RPO) were integrated with the district's use of SmartFusion, automatically encumbering funds each time a bookkeeper sent a requisition to their principal for approval.

"Previously, we simply didn't have the same flexibility we have with Etrieve. We weren't able to incorporate multilevel approval into our processes," said Watts. "By talking through our processes with Softdocs Professional Services, we came up with three additional requisitions to handle our special funding circumstances."

These new requisition types were a Capital Funds Requisition, Special Revenue Requisition and a Split Funds Requisition. Each is used by different departments, requiring different workflows and approvals. Every workflow recipient is able to view not only the RPO but also the attached quote and a detailed document history.

"In the past, these types of requisitions were done on paper. They'd find their way to the district bookkeeper or one of us in Finance to review, approve and file," said Watts. "Now we know exactly where they stand. Every requisition form is integrated with SmartFusion and becomes an actual purchase order that gets sent to the vendor once it's completed its workflow in Etrieve and received final approval."

A few schools also leverage electronic teacher requisition forms through Etrieve, allowing the teacher to enter the RPO instead of the bookkeeper. The submitted form is then routed to the bookkeeper to review and add the account number, before being routed to the principal for approval.

Lancaster CSD has also realized the benefit of having an electronic copy of each document stored within Etrieve's cloud-based content repository for future reference—with information easily searchable and readily available.

A Thriving Community

"Before we implemented our first Softdocs solutions back in 2012, we actually spent a day with Florence School District One—an existing Softdocs customer. We observed their processes to see how Accounts Payable could operate completely paperless and came away with a list of ideas to improve our pending deployment," said Watts. "Having hands-on time and seeing Softdocs solutions in action was huge for us. Since then, we've incorporated ideas from other districts that we heard at Softdocs' BRIDGE conferences and have even slipped into Florence's shoes for another district implementing Softdocs."

Between BRIDGE conferences, Lancaster CSD finds the Softdocs Community portal to be an invaluable resource in networking with other customers and connecting with Softdocs' technical resources.

"We want to expand our use of Etrieve because, although we use it well, we know there are numerous opportunities for us to implement new uses over time."