Saint Michael's College Gained Efficiency and Improved Processing with Etrieve

"With the training we received from Softdocs, we can handle things like setting up new electronic forms, document type additions, security setup, and import lookups. With ImageNow, we had to go through their support, and it would take weeks for even simple things. By switching to Etrieve, we are saving both time and money."

PETER CROSS
SENIOR SYSTEMS ANALYST - SAINT MICHAEL'S COLLEGE

KEY TECHNOLOGY DEPLOYMENTS

▶ Ellucian Colleague
▶ Raiser's Edge
▶ Slate

CHALLENGES

▶ Experienced continued decline in the quality of customer support for the ECM system used in Financial Services, Admissions, and Registrar's Offices
▶ Needed a simpler, more streamlined way to provide access and service for more than 10,000 text file transcripts
▶ Needed an ECM solution that would integrate with other key technology deployments

SOLUTIONS

▶ Etrieve by Softdocs

SAINT MICHAEL'S COLLEGE
COLCHESTER, VT
Student FTE: Approximately 2,100

Saint Michael's College is a Catholic, liberal arts college located between Lake Champlain and the Green Mountains of Vermont. Entirely residential, Saint Michael's offers a vibrant, engaged campus. In addition, the institution believes in "faith in action," resulting in more than 70% of its students participating in service.

In 2020, Saint Michael's College extended their utilization of Etrieve by Softdocs from Institutional Advancement to include Registrar, Student Financial Services, and Admissions Offices—replacing ImageNow. Hundreds of thousands of documents were moved onto Etrieve, and migration also provided an opportunity for process improvement. Since the switch, Saint Michael's has:

▶ Eliminated 16 filing cabinets within Institutional Advancement

▶ Reviewed, corrected, and refiled migrated docs which contained missing or incomplete info

▶ Consolidated different email document types down to one per office

▶ Quickly created electronic form to collect and record data on student COVID-19 vaccination rates

Saint Michael's College first implemented Etrieve by Softdocs for electronic forms, workflow automation, and digital content management in Institutional Advancement.

The benefits were both immediate and significant. Seeking to make constituent data and pertinent information easily accessible to those who are making the calls, the institution began digitizing years of records and files. Paper documents, which filled 24 file cabinets, were methodically scanned then shredded. Institutional Advancement was able to completely empty and remove 16 of their file cabinets, essentially reclaiming a whole room's worth of square footage.

But more importantly, all those paper files became easily searchable, readily accessible, and secure within Etrieve. "In this day and age, when sharing a personal conversation with a constituent over the phone, asking for funds is getting harder and harder to do," said Peter Cross, Senior Systems Analyst at Saint Michael's College. "Now, IA staff members simply open up a web browser and search for the constituent's name, where they can access all pertinent information to meaningfully engage with those they call."

Extending Etrieve Across Campus

Institutional Advancement's success and satisfaction with the Etrieve platform caught the eye of the institution's CIO amidst frustrations with ImageNow, the digital content repository for a handful of other departments. Due to a continued decline in the quality and consistency of ImageNow customer support, the institution chose to further their relationship with Softdocs, pivoting these remaining departments from ImageNow to Etrieve.

"We had been with ImageNow since 2008 in our Registrar's office, Student Financial Services, and admissions. During that time ImageNow was acquired several different times, and with each iteration, we felt the support diminish," said Cross. "Especially compared to Softdocs support, which is out of this world."

Having utilized ImageNow for over a decade, Saint Michael's College had hundreds of thousands of documents to migrate.

The Softdocs Professional Services team worked closely with Cross, holding regularly scheduled meetings to review system best practices and any additional functionality Saint Michael's College wanted to introduce with the system migration—including document type additions, granular security settings, and import lookups.

"I had some real concerns about moving documents off ImageNow. Not because we didn't want to, or need to, but because there were so many, and we had done a lot of different customizations! But the Softdocs services team was top-notch and very supportive. They stepped us right through the process."

PETER CROSS
SENIOR SYSTEMS ANALYST - SAINT MICHAEL'S COLLEGE

"If a department says they need a new document type or different kind of access granted, I'm able to turn around their request in an hour or less. That is a huge gain for us."

PETER CROSS
SENIOR SYSTEMS ANALYST - SAINT MICHAEL'S COLLEGE

Tasked with leading the migration, Cross began setting up required document types within Etrieve and tracking his progress. Having assembled a core team (one person from each office), Saint Michael's College hosted sessions to ensure each department approved the direction of the work being done. "This migration was an opportunity for us to clear up our data, addressing and refiling documents that were incomplete or misfiled," said Cross. "It was a great chance to clean house, streamline processes, and make things easier to find."

While the institution leveraged several different email document types in ImageNow, they simplified to just one type per office. And with the intuitive nature of Etrieve's web-based user interface, end users took to the new system like ducks to water. New hires had ready access to any information needed to complete their tasks. If employees got a new computer or device, Etrieve was already there—without having to be installed.

"Our end users love the fact that if they need something new—an import or a document type—well, we know how to get that done for them. Our previous system was a black box for us. It would take weeks to get something really simple done," said Cross.

Modernizing Transcript Retrieval

For decades, Saint Michael's College has managed the transcripts for Trinity College. The process for handling these transcripts involved a legacy piece of software on a Windows 2000 machine. It was clear there needed to be a simpler, more streamlined way to provide access and service for the more than 10,000 text file transcripts housed within this antiquated system. Following the migration of these documents to Etrieve, employees can now easily search by the transcript requestor's name, download the transcript, and print it out. In addition to being more accessible, records are backed up each night—providing peace of mind against cybersecurity intrusions and natural disasters.

Tracking Student COVID-19 Vaccinations

Like many other educational institutions, Saint Michael's College turned to Enterprise Content Management (ECM, i.e. electronic forms, workflow automation, and digital document management) as a central component for offering seamless services during the global pandemic. Electronic forms, within Etrieve, were introduced to collect data from students about COVID-19 vaccinations. The submitted e-forms route into Etrieve's content repository, where faculty within the institution's Residence Life and Student Health Offices can easily access them—when needed. This allows the institution to determine vaccination rates among its students when discussing plans for upcoming semesters.

Enhancing Key Campus Systems

"We leverage many different applications. We have Oracle, Colleague, Raiser's Edge, Slate, and Etrieve," said Cross. "All of them pass data back and forth." Integrations and document imports ensure data remains accurate and consistent across systems. For example, during the onboarding process, data is pushed into Colleague from Slate and other systems, while Raiser's Edge pushes and pulls Colleague data when needed. Leveraging an ECM solution like Etrieve supports the institution's two Enterprise Resource Planning (ERP) solutions and other key systems with robust e-forms, workflow, and document management functionality.