

## Solution Summary

For over 20 years, Softdocs has been developing education-focused document management solutions to help school districts eliminate manual paper-based processes.

Our cloud-based K-12 solution, **Etrieve K12**, offers a scalable, process-oriented approach leveraging document management, as well as pre-built electronic forms and workflow features that can be deployed district-wide.



OVER  
**600**  
Customers Across the United States

**99+%**  
customer retention rate



### FINANCE

Our finance solutions streamline workflow as well as reduce required resources and costs of finance operations, including automation of expense reporting, travel requests, purchasing, accounts payable approval and records management.



### HUMAN RESOURCES

From hire to retire, teachers and staff have access to personnel files as needed and common processes like employee self-service, electronic teacher contracts and onboarding are streamlined, allowing staff to focus on high priority district needs, not tedious tasks.



### STUDENT RECORDS

No matter the size of the district, student registration, contact management and record organization are simplified. Paper files are reduced through improved management of all records, including special needs, ensuring files are organized effectively, while remaining compliant with state and federal regulations.

## Document Management



Our browser-based solution integrates with most ERP systems, allowing for seamless document management. With advanced features like in-browser scanning and a user interface designed for native use on tablets and mobile devices, our next generation solution can provide the powerful tools your district needs to effectively capture and organize information.

## Electronic Forms



Whether you are designing electronic forms in-house or selecting pre-built forms from our extensive electronic forms library, our application allows you to complete and submit forms with ease. Electronic forms can be pre-populated with data from your existing ERP, increasing productivity and efficiency.

## Workflow



Browser-based and built for mobile, our workflow application allows you to easily manage process-based workflows across all departments. Our intuitive design editor allows users to build workflows easily—no coding required. View the life cycle of a document at any stage, improving accountability and eliminating multiple, mismatched streams of communication.

## Print Customization and Delivery



Our tried-and-true print customization solution allows for the easy creation of laser printed checks, transcripts, grade reports, payroll stubs, purchase orders, award letters, parking permits and more. With our eDelivery component, would-be printed documents can instead be automatically emailed or faxed.

## Our Solutions in Action

