



Electronic Forms and Workflow Automation An Operational Transformation Toolkit for the Digital Campus

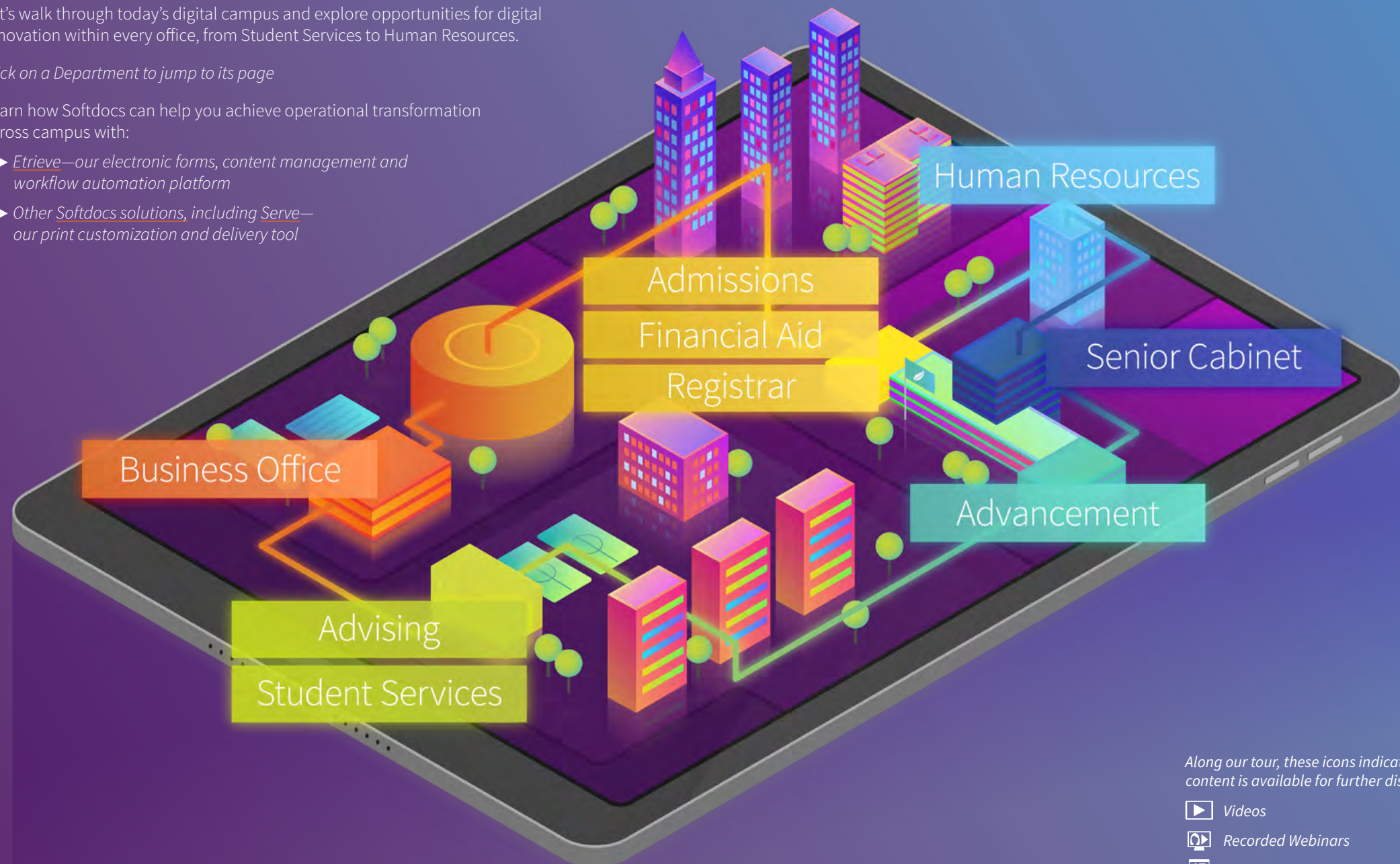
As higher education's response to recent disruption shifts from a focus on continuity towards the pursuit of operational transformation, institutions are taking a *fresh look* at how every office on campus serves students, faculty, staff, vendors and donors. ►

Let's walk through today's digital campus and explore opportunities for digital innovation within every office, from Student Services to Human Resources.

Click on a Department to jump to its page

Learn how Softdocs can help you achieve operational transformation across campus with:

- ▶ [Etrieve](#)—our electronic forms, content management and workflow automation platform
- ▶ Other [Softdocs solutions](#), including [Serve](#)—our print customization and delivery tool



Along our tour, these icons indicate related content is available for further discovery

 Videos

 Recorded Webinars

 Customer Story Use Cases

Admissions



Attract and retain the best students with Admissions processes that support the creation of comprehensive, digital records for every student. Bolster their experience with mobile-friendly electronic forms capable of being automatically routed for approval and electronic archival.

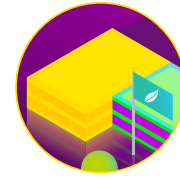
FREQUENTLY LEVERAGED ADMISSIONS E-FORMS:

- Admissions Application
- Common Application
- Parent’s Verification
- Residency Application
- Residency Verification
- Student’s Verification
- Tuition Exemption Request

EASILY DIGITIZED ADMISSIONS DOCUMENTS:

- | | |
|---|---|
| National Letters of Intent | Letters of Recommendation |
| Copies of Photo Identification, such as Driver’s Licenses | Medical Records, including Immunization Records |
| Copies of Social Security Cards | Official High School Transcripts |
| Documentation of AP and IB Scores | Transcripts from Other Institutions |
| Correspondence | Personal Essays |
| International Student Financial Certification Statements | SAT, ACT and Other Entrance Exam Scores |

Financial Aid



Create a simple, seamless financial aid experience by completing a comprehensive, digital record for every student and leveraging mobile-friendly e-forms to improve communication during every interaction between the Financial Aid office and students, or their parents.

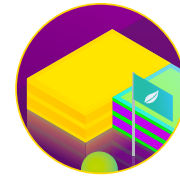
FREQUENTLY LEVERAGED FINANCIAL AID E-FORMS:

Change of Dependency Request	Request to Cancel Financial Aid
Change of Income Request	Satisfactory Academic Progress Appeals
Dependent Verification	Scholarship Application
Federal Direct Loan Cancellation	Tuition Reciprocity Request
Federal Tax Form–Parent	Work Study Job Application
Federal Tax Form–Student	

EASILY DIGITIZED FINANCIAL AID DOCUMENTS:

Award Letters
Federal Direct Parent PLUS Loan
Income Tax Documentation
IRS Form 1040
IRS Form 1099-MISC
IRS Form W-2
Scholarship Recommendation Letters
Veterans Benefits Documentation
Any Additional Relevant Financial Documentation

Registrar



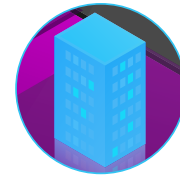
Support each and every student with complete, secure and integrated digital records, in addition to mobile-friendly e-forms which can be automatically routed for review before being electronically archived.

FREQUENTLY LEVERAGED REGISTRAR E-FORMS:

Academic Withdrawal Form	Medical Leave Request/ Leave of Absence
Application for Individualized Study	Pass/Fail Grade Request for Course
Course Add/Drop	Request for Change of Name/ Social Security Number/Address
Course Authorization	Request to Rush Diploma
Course Withdrawal	Request to Take a Course
Enrollment Verification	Course Substitution/Waiver
Grade Change	Transfer of Credit/Senior Year in Residence
Internship Course Registration	Transfer of Graduate Credits
Late Fee Waiver Petition	
Major Declaration	

EASILY DIGITIZED REGISTRAR DOCUMENTS:

Academic Standing Reviews	Degree Audits
Class Schedules	Correspondence
Copies of Driver's Licenses	FERPA Agreements
Course Planning/Multi-Year Course Planning documents	Grade Reports



Central to the success of any institution is the success of its employees, faculty and staff. Improve the experience you deliver by digitizing your Human Resources processes with electronic forms and transitioning hard-copy files into an electronic content repository that keeps every document secure, yet readily available.

Human Resources

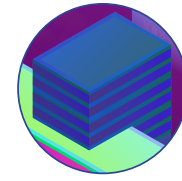
FREQUENTLY LEVERAGED HUMAN RESOURCES E-FORMS:

Address Change	Leave Request
Benefit Enrollment	Sabbatical Request
Direct Deposit Authorization	Tenure/Promotion Request
Employment Application	Travel Request
Employment Verification Request	Work Study Job Application

EASILY DIGITIZED HUMAN RESOURCES DOCUMENTS:

Adjunct Contracts
Background Checks
Certified Contracts
Employee Applications
IRS Form W-2
IRS Form W-4
Personnel Action Forms
USCIS Form I-9

Senior Cabinet



Create a secure space to review the highest level strategy and priority issues of the Executive Cabinet serving the Office of the President, Provost, Chief Financial Officer, VPs and the Board of Trustees. How impactful would a safe, digitized and customized experience be for handling senior level requests and considerations? In what ways would your day-to-day change if all of your correspondence, requests and contract records were completely secure but digitized?

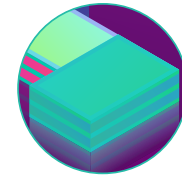
FREQUENTLY LEVERAGED SENIOR CABINET E-FORMS:

Board Agenda Request
Cabinet Agenda Request
Faculty New Seminar/Course Request
Faculty/Dean New Major Request
Request for President Meeting

EASILY DIGITIZED SENIOR CABINET DOCUMENTS:

Approved Fiscal Year Budgets
Board Minutes and Agendas
Legal Contracts
Official Campus Policies
President Correspondence
Union Arbitration and Agreements

Advancement



A sustainable future for your institution means meeting alumni needs, even after graduation. Deliver an improved alumni experience by digitizing Advancement forms and records. Imagine every form being submitted electronically and automatically routed for review, before being digitally and securely archived within an online content repository, to which permissions can be granted to any development officer with a need to access.

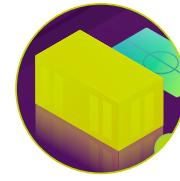
FREQUENTLY LEVERAGED ADVANCEMENT E-FORMS:

Alumni Association Membership Request
Career Information Update
Change of Marital Status
Change of Name
Class Year Update
Gift Processing
Pledge

EASILY DIGITIZED ADVANCEMENT DOCUMENTS:

Class Reunion Information	Stewardship Plans
Correspondence	Stewardship Preferences
Donation History	Transaction Data
Gift Agreements	Trusts
Legal Contracts	Wealth Data
Solicitation Support Documents	Wills

Advising



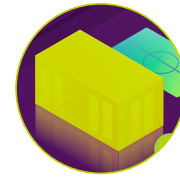
Innovative Advising processes create a successful link to students, faculty and staff. Imagine how digitizing and automating the forms you use the most would improve the experience you deliver. What if Advising records weren't housed in filing cabinets, but an electronic content repository that's both highly secure AND easily searchable?

FREQUENTLY LEVERAGED ADVISING E-FORMS:

- Change of Advisor
- Change of Minor/Major Request
- Course Waivers/Substitutions
- Grade Appeals
- Petition for Residency
- Study Abroad Request

EASILY DIGITIZED ADVISING DOCUMENTS:

- Advising Checklists
- Advisor Meeting Notes
- Career Center Meeting Notes
- Career Placement Test Notes



Across education, institutions look to provide the best, most comprehensive student experience. Improve the experience of your students by leveraging electronic Student Services forms and digitizing all Student Services records to ensure the information your students need is always kept secure, yet readily accessible.

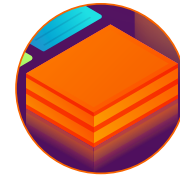
FREQUENTLY LEVERAGED STUDENT SERVICES E-FORMS:

Accessibility/Disability Services Request
Meal Plan Request
Request to Start a New Campus Organization
Rescind Housing/M meal Plan Request
Room Assignment Change Request
Room Damage Forms
Study Abroad Request
Tutoring Request

EASILY DIGITIZED STUDENT SERVICES DOCUMENTS:

Disciplinary Records
Payment Statements
Refund Statements
Student Billing Monthly Statements
Tuition Reimbursement

Student Services



Meet the growing challenges of higher education business processes with the agility provided by digitizing Business Office records and leveraging mobile-friendly electronic forms within the Business Office.

Business Office

FREQUENTLY LEVERAGED BUSINESS OFFICE E-FORMS:

- AP Approval Form
- New GL Account Request
- Petty Cash Voucher
- Purchase Request
- Travel Reimbursement Request

EASILY DIGITIZED BUSINESS OFFICE DOCUMENTS:

- Checks
- Expense Reports
- Invoices
- Monthly Financial Statements
- Packing Slips
- Purchase Orders
- Supporting Documents

“

Think university wide, not departmentally.

Think strategically and scalable. Whether you are decentralized or not, this will improve your ability to make the most of any technology you select.

”

JONATHAN SEE
CIO | PEPPERDINE UNIVERSITY

Adapt to Higher Education's New Normal with Etrieve

Today, the business processes of every office need to be agile, automated and ready to adapt to the ever-changing needs of the digital campus. Moving forward, plans not only need to include business continuity initiatives but also multiple scenarios for students and staff. Recent disruption has revealed that much. Institutions need the *right* toolkit, an enterprise platform, to digitize paper forms and files, automate workflows and continue to provide the same, high level of service to students and employees.

Etrieve by Softdocs, our enterprise content management solution, was made for this moment. Combining electronic forms and workflow automation with a secure, online content repository, Etrieve is truly an all-in-one toolkit for institutions seeking Operational Transformation.

Understanding the Etrieve Platform

ETRIEVE CONTENT

Serves as a central, online repository within which all of your institution's content is stored, organized and secured. Students and employees can easily locate, review and edit needed documents, following user permissions.

ETRIEVE FORMS

Enables your employees to create, edit and route e-forms from any device. Form recipients can review, approve, deny, comment, edit or reroute forms based on business rules. Forms can prepopulate with ERP/CRM data and write submitted data back to campus systems.

ETRIEVE FLOW

Provides users with the ability to build, configure and automate workflows for any process. An intuitive, graphical designer makes it easy to deploy conditional, dynamic workflows that are easy for everyone to understand.

Through Etrieve, students and employees have secure, anytime access to the files, forms and workflows they need. All managed securely in the cloud, and all integrated with your ERP and CRM systems. To illustrate the value that Etrieve provides the *entire digital campus*, this e-book showcases a few of the ways Etrieve can be leveraged across your institution. [Review the Campus Map](#) and walk through some higher education use cases.

“
 Serve operates seamlessly. By simply trusting the system to do its job, I am able to focus on other improvements. Serve's ease of use is a huge benefit, both to our end users as well as our IT staff.”

MONTE CHRISTMAN
 ASSOCIATE DIRECTOR OF INFORMATION TECHNOLOGY
 CENTRAL CAROLINA COMMUNITY COLLEGE

Expanding the Impact of E-Forms Across Campus

Supporting your pursuit of Operational transformation and desire to simplify processing campuswide, Softdocs provides a number of complementary applications to the Etrieve platform, which help institutions maximize the value being received from existing systems of record and utilization of electronic forms.

ETRIEVE CONNECT

Defines how data can be securely pushed or pulled between Etrieve and your ERP, SIS or other trusted applications. Through plug-ins and database connections, Etrieve Connect provides the integration types and techniques you need to integrate Etrieve with any data source on campus.

ETRIEVE EMAIL CAPTURE

Applies your business rules to one or more inbound mailboxes, to check each correspondence for specific conditions. When these conditions are met, Etrieve Email Capture automatically pulls the emails and attachments into Etrieve for archival.

ETRIEVE FILE

Allows for the automatic indexing and filing of documents. Etrieve File captures indexable data from an active ERP screen and applies the indices to a physically scanned document before filing it in the proper location within Etrieve.

ETRIEVE LAUNCH

Leverages data from an active ERP screen to search for related documents within Etrieve. By displaying the resulting images conveniently within the user's browser window, Etrieve Launch increases the efficiency of search, retrieval and document approval processes.

ETRIEVE SECURITY

Integrates with Active Directory (AD), ADFS, CAS, Shibboleth, OneLogin, Okta or other federated services to allow for single sign-on, and enables centralized security and access control across the entire Etrieve platform.

SERVE BY SOFTDOCS

Is an electronic document manager which stores pre-designed forms, checks, logos, signatures, etc. Based on the input data it receives, Serve automatically selects and sends the appropriate file, populated with the necessary data, to the printer, to Etrieve Content for archiving or through eDelivery for electronic distribution.