

IMMEDIATE NEED REQUEST
2023-24



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|---------------------------------------|-------------------------|------------------------------------------|--|-----------------------|--|
| Requested by: Administrative Services | | Information Technology | | Date to VP: 6/15/2023 | |
| Location | (Fill-in) | Reviewed By (Signature): | | | |
| Department or Unit: | IT Project Management | Monica Cantu-Chan | | Date to Cabinet: | |
| Division: | Information Technology | Chris Schroeder Monica Cantu-Chan | | Outcome: | |
| Vice President: | Administrative Services | 6/22/2023 | | | |

| Budget Request(s) (List in Priority Order) | Justification for Request(s) An "Immediate Need" is a shortfall in funding that, unless funded immediately, could cause a program to cease to function. | Funds Requested ** | | | Funding |
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| | | Amount | One-time | Ongoing | Approved |
| 1. Ertieve by Softdocs licensing | <p>The contract with Softdocs for Ertieve Forms and Workflow software was approved by the Board of Trustees on July 8, 2020. The software was specifically sought by a task force to facilitate the transition of the campus from manual to online processes due to the impact of the COVID-19 pandemic. Softdocs emerged as a crucial tool during the pandemic, enabling the College to implement an electronic forms solution. This solution allowed IT to partner with functional departments to create customized e-forms, eliminating the reliance on paper and significantly reducing processing time. As a result, the software greatly enhanced the College's ability to serve students and staff more efficiently.</p> <p>Softdocs facilitated secure online completion of forms by students, employees, and third parties. These forms could be easily routed through a predefined, automated workflow, minimizing the need for in-person form submissions during the campus closure. The software proved to be a seamless replacement for hard copy forms and reduced the necessity for physical visits to the campus. Additionally, Softdocs played a vital role in the College's implementation of COVID-19 vaccination and exemption mandates.</p> <p>Currently, Softdocs has evolved into an essential tool for automating complex manual processes across the campus. Moreover, Softdocs' integration with Banner facilitates a seamless flow of information, enabling authorized personnel to access student records, generate reports, and track progress within a unified environment. This comprehensive integration eliminates the need for duplicate data entry and manual errors, saving valuable time and resources for staff and faculty. Various process, such as Dual Enrollment Student/Guardian Packets, IT Access forms, Payroll forms, the Wellness Center, and numerous special programs, are now automated using Softdocs. The tool's usage has expanded to encompass the automation of the Articulation Agreement through the development of three forms, workflow management, and a maintenance form used by staff. The IT department has successfully onboarded CalWorks and EOPS, and is actively collaborating with Access, Special Admit, Facilities, and the Mt. SAC Foundation.</p> <p>The utilization of Softdocs in conjunction with Banner integration has proven to be invaluable in streamlining administrative processes and improving overall operational efficiency. To sustain and further advance these digital transformations, we are seeking funding for the contract's fourth and fifth years. Furthermore, ongoing funding is required for the subsequent contractual term, estimated at five years. This financial support will enable us to optimize the integration of various systems and applications, ensuring smooth data flow, and reliable access to information across different functional areas.</p> | Year 4 - \$76,627.53 Year 5: \$78,926.33 | X | | |
| Account Number(s): | 11000.661000.584000.678000 | Fiscal Services - March 2013 | | | |



Agenda Item Details

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|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Meeting | Jul 08, 2020 - Regular Meeting of the Board of Trustees |
| Category | 6. CONSENT - ADMINISTRATIVE SERVICES |
| Subject | 6.14 Contract with Softdocs for Etrieve Forms and Workflow Software |
| Type | Action (Consent) |
| Recommended Action | It is recommended that the Board of Trustees authorizes the approval of the contract with Softdocs for Etrieve forms and workflow software. |

Prepared by: Kevin Owen/Monica Cantu-Chan

BACKGROUND

COVID-19 has required a change in the way the College conducts business. With the rapid change to remote working conditions, many documents and processes that have been carried out in-person and on paper for years are in sudden need of electronic solutions.

The College has identified a need to automate traditional paper-based business forms into electronic forms, including associated business processes. The majority of forms circulating on campus have been developed using Adobe Acrobat Pro DC. With Adobe Acrobat Pro DC, paper forms can be converted or modified to online-fillable documents, but cannot incorporate the required workflow necessary to trigger and complete associated business processes. The current manual process can no longer sustain the needs of students, parents, staff, and vendors. In addition, the current processes do not allow for automation nor integration with our Enterprise Resource Planning (ERP) or Enterprise Content Management (ECM) systems.

Etrieve by Softdocs offers a comprehensive ECM solution that combines electronic forms and workflow components into one platform built specifically for educational institutions. Etrieve Forms is an electronic forms solution that allows users to build customized e-forms, which eliminates the need for paper, as well as decreasing processing time. Coupled with Etrieve Flow, students, employees, and third parties can complete forms online, and easily route them through a predetermined, automated workflow. Users can review, approve, deny, e-sign, comment, or re-route forms based on their needs. In addition, Etrieve by Softdocs is a fully integrated product with the ability to automatically capture data within forms, maintaining student and employee data consistency across all applications, and providing more efficient business processes.

ANALYSIS AND FISCAL IMPACT

A task force, spanning the four major divisions and the President's Office, was convened to identify options for electronic alternatives for the campus. The task force evaluated three applications focusing on product/system features, ease of integration with existing ERP and ECM applications, security, scalability, and cost factors, among other vendor criteria. The task force performed an extensive evaluation and found the functionality and services offered by Softdocs to be the best long-term solution for the College. The software natively supports multi-language forms, fillable PDFs, conditional and dynamic workflows, electronic signatures (including multi-signature options), and will integrate with Banner and OnBase.

Etrieve by Softdocs is specifically designed for educational institutions and is currently being used by Yosemite Community College District, Santa Barbara City College, Cabrillo College, College of the Redwoods, and Riverside Community College District.

Public Contract Code Section 20652 allows the governing board of any community college district, without advertising for bids and when the board has determined it to be in the best interest of the district, to authorize the purchase of

such services through another public agency that has awarded a contract based on a formal bid process and which permitted its bid to be used by other public agencies. The College will be utilizing the contract with Yosemite Community College District, which allows other agencies to piggyback.

The first-year costs for the software licenses, maintenance and support, installation services, and hosting fees will be \$94,987.50. Year two costs for maintenance and support and hosting fees will be \$72,228.76, with an annual increase of 3% for years three, four, and five.

Funding Source

Unrestricted General Fund.

All matters listed under Consent Calendar are considered by the Board of Trustees to be routine or sufficiently supported by back-up information as to not require additional discussion. Consent Calendar items will be enacted by one motion. There will be no separate discussion on these items prior to the time the board votes on them, unless a Board member requests a specific item be removed from the Consent Calendar for discussion and a separate vote. Public comment on Consent Calendar items from anyone completing a card will be heard prior to the board's vote on the Consent Calendar.

Motion & Voting

It is recommended that the Board of Trustees authorizes the approval of the contract with Barsi Productions.

Motion by Judy Chen Haggerty, second by Manuel Baca.

Final Resolution: Motion Carries

Yea: Judy Chen Haggerty, Laura Santos, Manuel Baca, Robert Hidalgo, Rosanne Bader, Gary Chow