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Products

Q1 2026 Edition

Softdocs

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Document Management

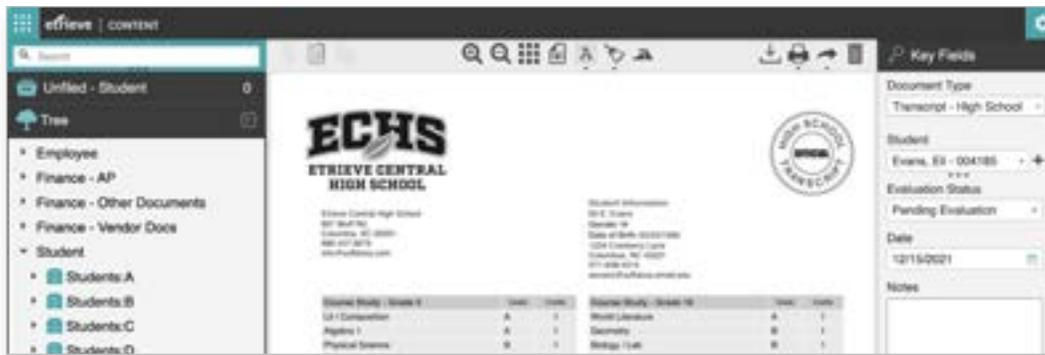
Take control of every document with Etrieve Content — streamlined, protected, and easy to access.

Etrieve Content

Currently licensed

Recommended

Not applicable



What it does Content is the core of document management in the Etrieve platform. It provides a secure, cloud-based repository for storing, organizing, and retrieving documents across departments. By replacing paper and shared drives with centralized digital storage, Content helps institutions prevent document loss, facilitate instant records access, and securely archive critical business information.

How it works Documents are added by upload, scanning, importing via network folders, virtual printing, integrations, or email attachments, then indexed for secure, searchable storage with role-controlled access. Users with appropriate permissions can apply retention policies, send documents through workflow, and otherwise leverage them within day-to-day processes.

Why it matters Content streamlines access, enhances compliance, and supports hybrid or remote work, making records instantly available and secure.

Licensing

Licensed by concurrent users only; users logged in at the same time need licenses, making it flexible and cost-effective. Most institutions average a 2:1 ratio between named users and concurrent sessions. (For example, 40 total users typically require 20 concurrent licenses.)

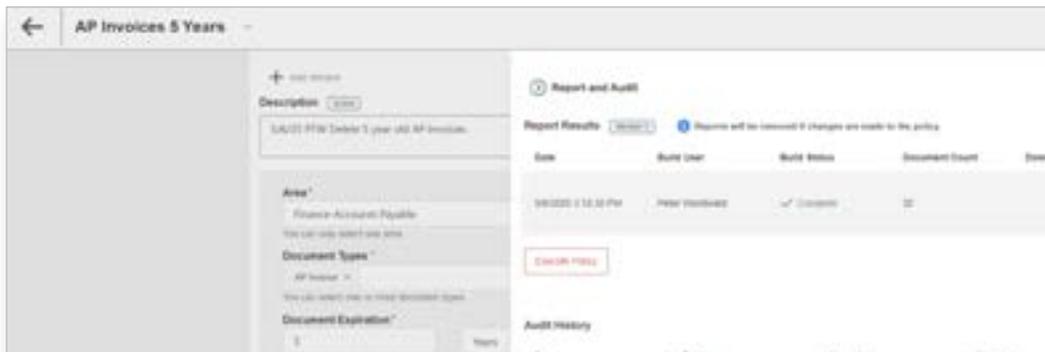
Document Management (continued)

Essential Extensions: Document Retention

Currently licensed

Recommended

Not applicable



What it does Document Retention automates lifecycle management within Etrieve Content, ensuring records are retained as required and securely removed when obsolete. Retention schedules can be set by document type, metadata, or policy for compliance.

How it works Administrators set rules for how long documents stay in the system and what happens at expiration. The system can archive, flag, or delete documents, maintaining an audit trail. Retention rules can vary by department or record type, and all actions are logged for traceability and compliance.

Why it matters Automated retention reduces compliance risk, storage costs, and manual oversight, ensuring only relevant records are accessible and supporting strong data governance.

Document Management (continued)

Essential Extensions: Public Portal

Currently licensed

Recommended

Not applicable

What it does Public Portal is a secure, read-only web interface that allows external users to search for and view public documents by type. Organizations can use it to provide controlled, open access to certain records, such as policies, meeting minutes, or reports, without requiring internal logins or direct system access.

How it works Administrators select which document types are publicly available using a service-level account. External users can search for approved documents by keyword or metadata and view or download them securely online. Only designated document types are visible; no internal folders or structures are exposed.

Why it matters Public Portal lets people access selected public records independently, while keeping all other content secure and well-managed. It eliminates the need to handle record requests by hand, reduces admin workload, and ensures only approved information is shown to outside users. With strict permission controls via a service-level account, organizations can safely share documents with the public while protecting their internal data and systems.

Essential Extensions: Self-Service

Currently licensed

Recommended

Not applicable

What it does Self-Service lets authenticated users securely access their records through a web portal, reducing administrative workload and improving self-service access to important information.

How it works Accessible via secure login, Self-Service displays only authorized records based on user roles, like tax forms or employment documents. Users can securely view or download records from any browser or device. Access is read-only to preserve data integrity, and the interface is accessible and responsive.

Why it matters Self-Service empowers users to retrieve information without staff help, improving transparency, compliance, and user experience while reducing manual requests.

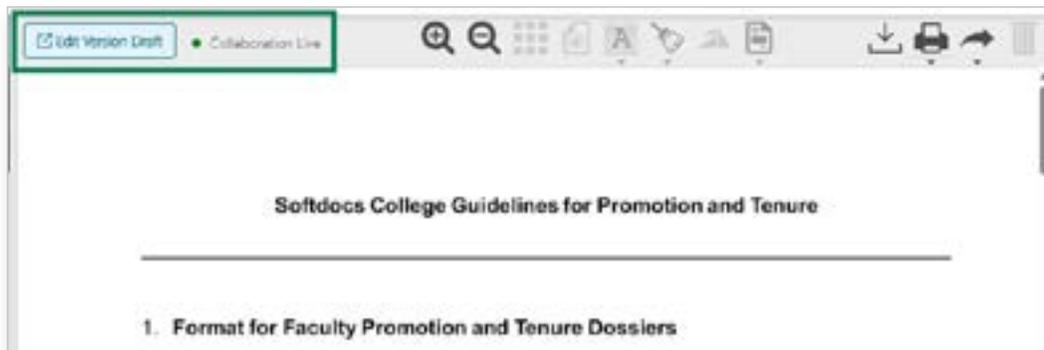
Document Management (continued)

Essential Extensions: Collaboration and Version Control

Currently licensed

Recommended

Not applicable



What it does Collaboration and Version Control lets users securely edit, review, and manage document versions within Etrieve. Its support for team collaboration includes annotations, redlines, and revision tracking to ensure document integrity and compliance.

How it works Authorized users can review, comment on, or suggest changes directly in the platform. Edits are managed with automatic versioning, user IDs, and timestamps. Annotations allow highlights, comments, and stamps without altering the source file. Redlining visually tracks edits. Role-based permissions control who can edit, view, or annotate. All activity and version history are recorded in audit logs for transparency and compliance.

Why it matters Collaboration and Version Control streamlines teamwork by centralizing review and editing, reducing reliance on email attachments and external sharing. It ensures the most current version is accessible, traceable, and compliant.

Collaboration and Version Control Licensing

Collaboration and Version Control is a licensed add-on to Etrieve Content. Users who collaborate or edit documents must have an active Etrieve Content license and consume a concurrent license during their session.

Capture and Automation

Automatically collect and process documents — reducing manual work, improving accuracy, and speeding up workflows.

Advanced Capture Suite: Virtual Printer

Currently licensed

Recommended

Not applicable

What it does Virtual Printer, a desktop utility within Advanced Capture Suite, lets users “print” documents directly to Etrieve Content. This function replaces manual uploads and paper processes.

How it works Appears as a printer in Windows or macOS; selecting it routes documents to Etrieve Content for indexing and storage. Can be sold with Intelligent Document Processing (IDP) to automate data extraction.

Why it matters Virtual Printer eliminates paper and manual uploads, speeding digital intake and ensuring secure, consistent filing directly from business applications.

Advanced Capture Suite: Web Capture

Currently licensed

Recommended

Not applicable

What it does Web Capture allows users to upload, classify, and index documents into Etrieve Content using a simple web interface. This streamlines the intake of high-volume batches of documents.

How it works Users batch upload files and assign indexes in real time. Admins set validation and review rules for accuracy. Intelligent Document Processing (IDP) can be sold with Web Capture to automatically classify, extract, and validate data, reducing manual work and speeding intake.

Why it matters Web Capture removes the need for local software and manual sorting, standardizing intake for consistency and compliance. Documents are captured securely from any browser, speeding turnaround and reducing admin effort.

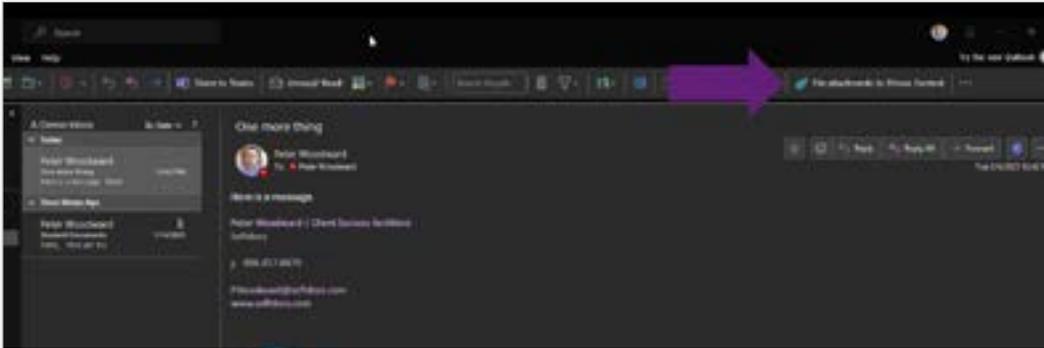
Capture and Automation (continued)

Advanced Capture Suite: Email Plug-In (Outlook or Gmail)

Currently licensed

Recommended

Not applicable



What it does The Email Plug-In lets users send email attachments directly from Outlook or Gmail to Etrieve Content, eliminating manual downloads and uploads.

How it works Email Plug-In adds an Etrieve option in your email client, letting users file attachments directly with auto-generated metadata, security permissions, and audit tracking. Additionally, Intelligent Document Processing (IDP) can be used to classify, extract, and route documents to the right workflow or system.

Why it matters The Email Plug-In reduces risk by capturing documents at receipt, reducing the process of securing documents to a single click. This ensures secure storage, accurate indexing, correct retention and access rules, and immediate availability.

Advanced Capture Suite Apps Licensing

These modules are part of the Advanced Capture Suite and follow the platform's concurrent user licensing model. Because documents are stored in Etrieve Content, each active user who consumes these tools counts toward the concurrent license pool during their session.

Intelligent Processing Suite

AI-driven automation for every document.

Intelligent Document Processing (IDP)

Currently licensed

Recommended

Not applicable



What it does IDP, an AI-powered feature of the Etrieve platform, automatically classifies, extracts, validates, and routes information from unstructured documents. It transforms static files like invoices, forms, transcripts, and applications into structured, actionable data, reducing manual data entry, boosting accuracy, and accelerating departmental document processing.

How it works IDP uses generative AI, machine learning, and natural language processing (NLP) to identify document types, extract fields, and validate against records. Unlike traditional OCR that only digitizes characters, IDP reads documents in a human-like pattern, connecting data to context. Integrated with Advanced Capture Suite, it processes and routes files automatically, highlighting uncertain data for review.

Why it matters IDP removes repetitive data entry and corresponding errors, improving speed and accuracy by several orders of magnitude. Capturing data consistently and securely at scale empowers small teams to ingest large volumes with maximum accuracy to reduce processing costs and accelerate turnaround.

IDP Licensing

IDP is licensed by monthly page volume, with pricing tiers starting at 5,000 pages per month. An Advanced Capture Suite subscription is required. Usage is measured by the number of pages processed each month, allowing scaling as institutional needs grow. Page volumes can be adjusted annually or during contract renewal to align with processing demand.

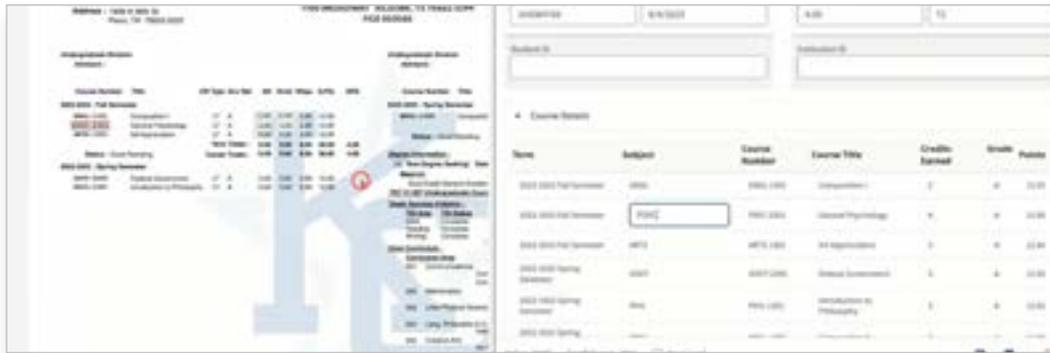
Intelligent Processing Suite (continued)

Intelligent Transcript Processing (ITP)

Currently licensed

Recommended

Not applicable



What it does Intelligent Transcript Processing (ITP) uses AI to automate the extraction, validation, and integration of student transcript data, eliminating manual entry and accelerating admissions, transfer credit evaluation, and registrar workflows.

How it works ITP uses generative AI and natural language processing (NLP) to read transcripts in any format, identifying key data such as names, GPAs, and grades. Confidence scoring flags uncertain data for review. Validated data is integrated into student information systems (SIS) or stored in Etrieve Content as searchable content. ITP is built on AWS Bedrock and meets NIST, SOC 2, and FERPA standards.

Why it matters ITP reduces the time, errors, and costs of transcript processing. Automation lets institutions make faster decisions and improves productivity and applicant experience.

ITP Licensing

ITP is licensed based on the FTE of the institution.

Forms and Workflow Automation

Seamlessly create and manage digital forms powered by automated workflows that keep processes moving efficiently and securely.

Etrieve Forms

Currently licensed

Recommended

Not applicable



What it does Forms lets organizations replace paper or PDF forms with secure, dynamic forms. Users can create, complete, and submit digital forms from any device, simplifying data collection and reducing paperwork.

How it works Admins use a no-code, drag-and-drop builder to create custom forms with conditional logic, attachments, electronic signatures, and more. Forms can be shared via portals, links, or public access.

Submissions can be routed through workflows, and fields can pre-populate from connected systems to reduce errors. All form submissions are stored securely. Both the authoring environment and the user-facing forms are fully WCAG 2.2 AA accessible.

Why it matters Forms moves processes fully online, improving accuracy, speeding approvals, and reducing admin burden by digitizing data collection and integrating with enterprise systems. It also helps any organization deploy accessible forms out of the box with zero code engineering.

Forms Licensing

Etrieve Forms and Etrieve Flow are licensed for the enterprise, not per user or per form. The organization has access to unlimited users, unlimited form submissions, and unlimited forms and workflows.

Forms and Workflow Automation (continued)

Etrieve Forms Builder

Currently licensed

Recommended

Not applicable

What it does Form Builder is a no-code tool in the Etrieve platform for creating and managing dynamic, branded eForms. Its drag-and-drop interface allows deployment across departments or for public use.

How it works Admins choose from various field types (text, dropdowns, attachments, eSignatures, etc.) and organize them for usability. Conditional logic shows or hides fields based on user input. Forms have their own data model for structure, validation, and integration. Branding options allow customization. Forms can be previewed, tested, and published for authenticated or public users. Version control tracks updates, and admins can retire or archive forms as needed.

Why it matters Form Builder lets business users digitize processes quickly, reducing creation time and cost, ensuring accessibility, and allowing easy adaptation as needs change.

Softdocs Forms Library (EdCloud, SchoolCloud, and Gov Central)

Currently licensed

Recommended

Not applicable

What it does Softdocs Forms Library gives organizations access to prebuilt, best-practice form templates, allowing quick deployment of common digital forms without starting from scratch. This accelerates implementation, ensures accessibility, and promotes consistency.

How it works Accessible in Etrieve, the Library includes hundreds of configurable templates for workflows like HR onboarding, student requests, purchase approvals, and more. Admins can search, preview, and import templates, then customize fields, routing, and branding. All templates meet accessibility and platform standards, and the Softdocs Library is regularly updated based on customer feedback.

Why it matters Softdocs Library helps organizations modernize faster by eliminating repetitive form creation, ensuring consistency, and enabling the quick launch of digital processes using proven templates.

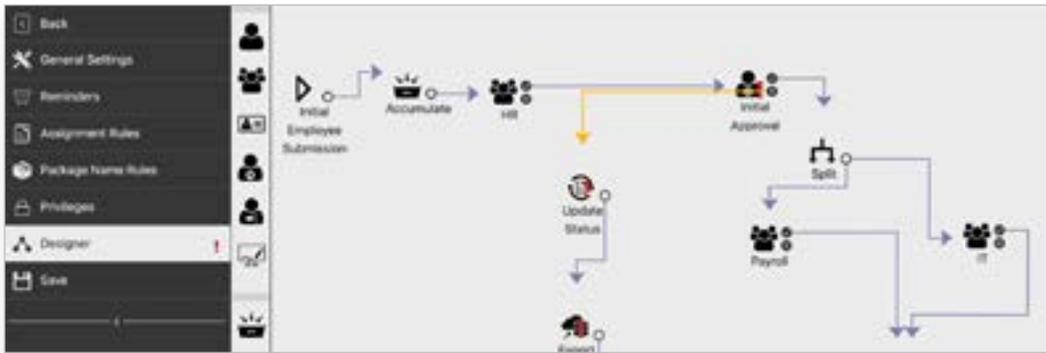
Forms and Workflow Automation (continued)

Etrieve Flow

Currently licensed

Recommended

Not applicable



What it does Etrieve Flow lets organizations digitize and automate approval processes with a no-code, visual workflow designer, turning manual workflows into efficient digital ones that improve turnaround and accountability.

How it works Admins design workflows with a drag-and-drop interface, connecting approvals, reviews, and notifications. Workflows support sequential/parallel approvals, conditional routing, and business-logic-driven automation. Integrated with Forms and Content, workflows can be triggered by submissions, metadata, or external events. Notifications and monitoring tools provide real-time status and audit trails. No coding required.

Why it matters Etrieve Flow removes bottlenecks from paper forms and manual approvals, ensuring consistency, speeding decisions, and reducing admin burden. Automation standardizes processes and strengthens compliance.

Etrieve Flow Licensing

Etrieve Forms and Etrieve Flow are licensed for the enterprise, not per user or per form. The organization has access to unlimited users, unlimited form submissions, and unlimited forms and workflows.

Electronic Signatures

Reliable, audit-ready eSignatures for every department and every use case.

Etrieve Document Signatures (Coming in 2026)

Currently licensed

Recommended

Not applicable



What it does Etrieve Document Signatures adds electronic signature functionality to the Etrieve platform, empowering users to place signature boxes and fields on PDFs and securely capture signed documents without needing external tools.

How it works Users can add fillable fields and signatures to PDFs in Etrieve, complete and sign them, and store them securely with version control and audit tracking. All signed files meet platform security and compliance standards.

Why it matters Etrieve Document Signatures streamlines digital signatures by keeping the process in-platform, eliminating manual and external steps, and supporting secure, auditable, and compliant digital approvals.

Etrieve Document Signatures Licensing

To be announced.

Electronic Signatures (continued)

Etrieve Forms Signatures

Currently licensed

Recommended

Not applicable



What it does Etrieve Forms Signatures delivers built-in, legally binding e-signatures for Etrieve Forms so students, staff, and constituents can sign and submit forms digitally without printing or scanning.

How it works Users complete an electronic form, apply their signature through secure authentication, and the signed record is automatically routed and archived in Etrieve with a full audit trail. Signature steps can drive workflow actions, approvals, and notifications.

Why it matters By embedding signatures directly into your digital forms, you eliminate manual paperwork, shorten turnaround times, and ensure every signed record is compliant, traceable, and stored in a single location.

Form Sign Licensing

Included under Softdocs' unlimited eSignature model with one subscription, unlimited signatures, and predictable annual pricing.

Integrations + Data Management

Connect your core systems and manage data with confidence.

Etrieve Connect

Currently licensed

Recommended

Not applicable



What it does Etrieve Connect is the integration framework that enables your SIS, ERP, CRM, portals, and custom apps talk directly to the Etrieve platform. It provides the ability to pre-populate forms with data from systems which expose an API or where a database can be accessed. It can also be used to update Key Fields in Content to stay in sync.

How it works Using secure REST APIs, web services, and prebuilt connectors, Etrieve Connect exposes key capabilities of Etrieve to include document storage, indexing, metadata, workflows, and forms to your other systems.

Why it matters ERP and SIS systems are a wealth of information. Being able to tap into this data to pre-populate forms or use it to automate where items are routed in workflow helps to automate processes within an organization.

Etrieve Connect Licensing

Etrieve Connect is included as a core part of the Etrieve platform, with scalable options tailored to integration needs. Your account team can guide you on the right approach using APIs, connectors, or both.

Integrations + Data Management (continued)

Salesforce Connector

Currently licensed

Recommended

Not applicable



What it does The Salesforce Connector integrates Etrieve with Salesforce, allowing users to view documents stored in Etrieve Content directly from within the Salesforce UI. It also enables document uploading via Salesforce with direct filing into Etrieve Content, bypassing Salesforce storage.

How it works Once connected, it syncs documents between the two systems. Users can upload or view documents associated with Salesforce records without leaving Salesforce.

Why it matters The Salesforce Connector bridges CRM and document management, eliminating duplicate entry and fragmented storage. It streamlines workflows and enhances responsiveness by connecting Salesforce interactions to the secure Etrieve repository, saving costs from expensive Salesforce storage.

Salesforce Connector Licensing

Licenses are associated to named SF users, per year (\$180 each, minimum 25 users). A service-level account in Etrieve manages document permissions and what is available to be viewed through the integration, and more licenses can be added as needed.

Insights + Reporting

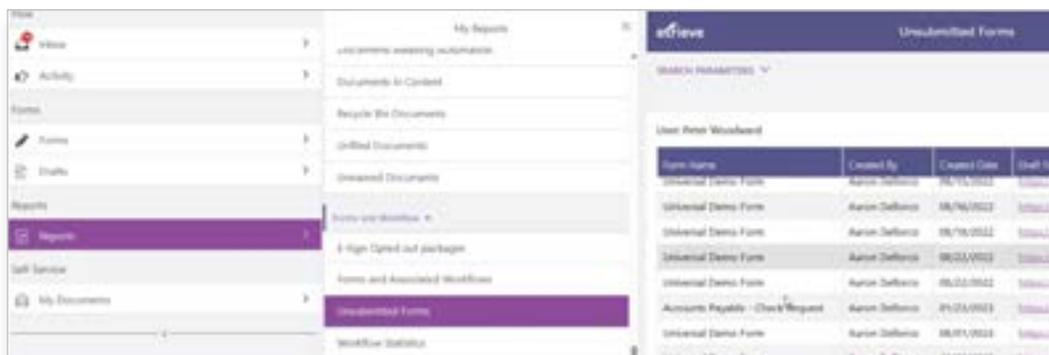
Real-time insights, shared across every team.

Etrieve Reports

Currently licensed

Recommended

Not applicable



What it does Reports offers built-in reporting for monitoring document activity, workflow performance, and system usage in Etrieve. It delivers insights to help maintain compliance, improve oversight, and optimize operations.

How it works Reports can be generated for uploads, views, deletions, approvals, and retention actions. Admins can create custom reports by filtering by user, document type, date, or workflow event. All data comes from secure audit logs, ensuring accuracy and tamper-proof results. Reports can be viewed in real time or exported for analysis and compliance.

Why it matters Reports enable transparency and data-driven decisions by providing visibility into document and workflow usage. Flexible, built-in reporting helps teams monitor compliance and improve operations without external tools.

Etrieve Reports Licensing

Reports is an Etrieve platform add-on with no seated licenses.

Insights + Reporting (continued)

Replicated Database

Currently licensed Recommended Not applicable

- What it does** Replicated Database enables organizations to provide view-only access to their Etrieve Content and Forms data, securely stored in Softdocs' cloud environments, via SQL Server Management Studio (SSMS) from the on-premises hybrid server.
 - How it works** Softdocs pushes a secure, read-only replica of your Etrieve Content and Forms data to your on-premises hybrid server. Scheduled refreshes keep the replica current, while SSMS and third-party reporting tools can safely query it without touching live systems.
 - Why it matters** The Replicated Database allows authorized institution staff to query the data and leverage it within third-party reporting tools.
-

SCIM (System for Cross-domain Identity Management)

Currently licensed Recommended Not applicable

- What it does** SCIM automates the provisioning and management of user accounts between your identity provider and the Etrieve platform, keeping access, permissions, and roles in sync and reducing manual updates.
- How it works** SCIM connects to providers such as Azure AD, Okta, and other SAML/OAuth2 systems. User changes in your directory are automatically reflected in Etrieve, keeping roles and permissions up to date.
- Why it matters** SCIM strengthens security and simplifies user management, preventing orphaned accounts and reducing errors. Real-time sync supports compliance and ensures that only authorized users have access to content and workflows.

Print Customization

Unify printing and document management in one seamless flow.

Serve Platform

Currently licensed

Recommended

Not applicable

What it does Serve is Softdocs' print customization and output management tool, automating document generation, formatting, and distribution from ERP, SIS, and core systems. It replaces manual print routines with digital, configurable output that can be archived, printed, or delivered automatically.

How it works Serve intercepts print streams, converts them to PDFs, and applies templates or overlays. Output can be stored in Etrieve Content, routed through workflows, or sent to printers or fax destinations. Serve includes a design module for custom template building, an eDelivery tool for automatic email distribution of generated documents.

Why it matters Serve eliminates manual, paper-based printing and distribution, reducing costs and admin work. Automated digital output ensures documents are consistent, accurate, and securely archived, helping organizations go paperless.

Serve Licensing

Serve allows unlimited access to create and modify templates without licensing requirements. The design module and eDelivery are available as optional add-ons to support the organization's specific needs.