

Softdocs



UMass Global

How UMass Global Replaced Multiple Legacy Applications with a Single Solution Integrated with Ellucian Banner, Salesforce, and Workday

UMass Global, a private, nonprofit affiliate of the University of Massachusetts, is committed to transforming lives through education. Facing outdated systems and redundant processes, the university sought a modern document management and process automation platform to streamline internal processes and enhance student services.

At a Glance:

- ✓ 8.4M documents migrated into a new secure repository
- ✓ 10+ forms consolidated into one dynamic “super form”
- ✓ Integrated electronic signature workflows
- ✓ Replaced multiple legacy systems
- ✓ Integrated with Workday, Salesforce, and Ellucian Banner

We were at the end of life with our legacy document management system, which we had used for over 10 years. We had two choices: either upgrade the legacy system or start fresh with a new solution. Microsoft was sunsetting InfoPath, and we had to either train our staff to move to Power Apps or use a simple SaaS solution for creating forms and workflows. Softdocs gave us the ability to do this with an easy-to-use platform, unlimited e-signatures, and a fixed-fee implementation.



Watch the complete webinar.

Khalid Tariq

Associate Vice Chancellor of Information Systems
UMass Global

The Challenge: Outdated Systems and Cumbersome Processes

UMass Global encountered several operational hurdles:

- 1 A legacy document management system (DMS) with slow, disruptive upgrades
- 2 Separate e-signature tools that increased licensing costs and complexity
- 3 Forms and workflows built in Microsoft InfoPath which hit end-of-life status
- 4 Limited integration with core platforms like Workday, Salesforce, and Ellucian Banner

Without a modern solution, inefficiencies and technical limitations would continue to burden staff and complicate service delivery for students.

The Solution: The Etrieve Platform from Softdocs

After a 10-month evaluation, UMass Global selected Etrieve from Softdocs for its:

- ✓ **Unlimited e-signatures and workflow automation:** streamlined approvals, reduced manual work
- ✓ **Cloud-based document management:** improved accessibility and records modernization
- ✓ **Mobile-ready and ADA-compliant tools:** ensured inclusive, flexible access
- ✓ **Seamless integrations:** with Workday, Ellucian, and Salesforce to eliminate data silos

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The Impact: Streamlined Operations and Significant Savings

This wasn't just a technology upgrade; implementing Etrieve fundamentally changed how UMass Global operated and served students.

- ✓ **Document Modernization**
8.4 million documents migrated, boosting searchability, security, and accessibility
- ✓ **Efficiency Gains**
10+ legacy forms combined into a responsive "super form," hugely improving user experience
- ✓ **E-Signature Integration**
Redundant tools eliminated, replaced with unified, automated workflows
- ✓ **Cost Savings**
License consolidation and legacy vendor replacement led to significant cost reductions
- ✓ **Connected Systems**
A new Salesforce connector transfers admissions data directly — no middleware needed

What's Next?

- 1 Contract generation with Workday data and Etrieve Signatures
- 2 Ellucian Experience integration
- 3 Department-specific document retention
- 4 PowerBI Integration for advanced reporting
- 5 New Forms Builder to empower business users

Ready to Modernize Like UMass Global?

Watch the complete webinar.

UMass Global didn't settle for patching up legacy systems — they embraced a modern platform to streamline operations and enhance student services.

