Migration Guide

Moving from BDM to Softdocs

Banner Document Management's legacy on-premises architecture and limited functionality keep institutions stuck with basic document storage, manual processes, and fragmented tools for forms, workflows, and e-signatures — while IT absorbs growing maintenance and upgrade burdens.

Softdocs provides a modern, cloud-native platform that unifies document management, forms, workflow automation, e-signatures, and intelligent processing.

With stronger security, seamless integrations, automated updates, and a proven migration path, the Softdocs Platform delivers the modernization and efficiency BDM cannot.

Welcome

The Softdocs Platform is built to modernize operations across human resources, enrollment, student services, finance, and beyond. But choosing the right document management and process automation solution isn't just about technology. It's about partnering with a team that knows higher education inside and out.
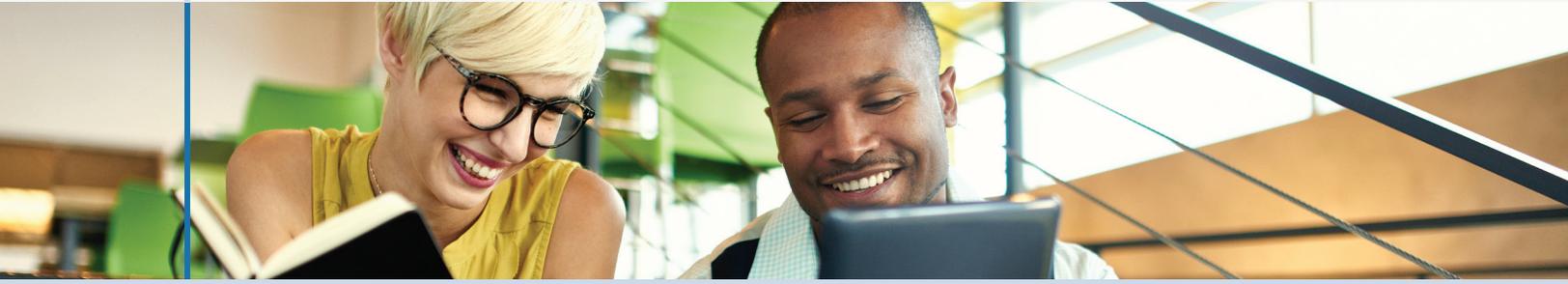
Universities and colleges are choosing Softdocs for lower costs, effortless upgrades, world-class support, and a secure, compliant cloud built for education. By comparison, BDM remains anchored to on-premises infrastructure that will never modernize. BDM customers are increasingly frustrated with an outdated, clunky interface that offers no mobile access and limits them to basic document storage — forcing them to rely on separate tools for forms, workflow, and e-signatures.

They're finding a fully integrated platform with Softdocs.

More than 100 schools have migrated to the Softdocs Platform. This guide is for teams like yours using BDM to articulate why switching makes sense. You'll find a side-by-side look at features, what makes Softdocs different, insights from organizations who have already made the move, and a practical roadmap for migration.

Here's what's included in this migration guide:

The Outcomes of a Successful Migration

Migrating from BDM to the Softdocs Platform isn't just a technical project — it's your opportunity to re-imagine how processes work. Softdocs has advised thousands of institutions, helping modernize schools, empower staff, and deliver best-in-class experiences for users. Here are the outcomes we help all customers achieve.

Alignment with Organizational and IT Strategy

✓ Supports student and employee success, compliance, team efficiency, and cost savings

✓ Solves bottlenecks in high-impact areas by leveraging forms, workflow, and eSignatures to automate approvals and route work dynamically

✓ Enjoys enthusiastic adoption by staff for its speed and ease of use

✓ Delivered as secure SaaS platform that ensures ongoing innovation, scalability, and reliability while removing on-premises infrastructure to open IT's capacity

✓ Establishes a long-term digital foundation, not just patching today's pain

Protection of Sensitive Data

✓ Implements enterprise-grade application security, audit trails, permissions, and encryption

✓ Enforces retention policies for compliant disposition of documents

✓ Protects against disasters, theft, and loss with multiple layers of data redundancy

Information When, Where, and How It's Required

✓ Employs digital workflow to proactively push information to reviewers and approvers

✓ Captures diverse user information via fully customizable eForms

✓ Bi-directionally integrates with core systems of record like SIS, ERP, and CRM to ensure consistent, reliable, and current information

Familiar Features, Modernized and Enhanced

1. Enterprise Document Management

With BDM, you may already be accustomed to scanning and storing documents in a centralized repository, applying indexes, and running searches when you need to retrieve records.

The Softdocs Platform builds on this foundation with a modern interface that makes managing documents as intuitive as it is powerful. Its cloud-native repository features a clean, responsive design and simple navigation. Behind the scenes, intelligent metadata tagging, lightning-fast search, automated retention policies, and built-in compliance controls keep your content organized, accessible, and secure. Documents are faster to find, easier to manage, and protected with confidence.
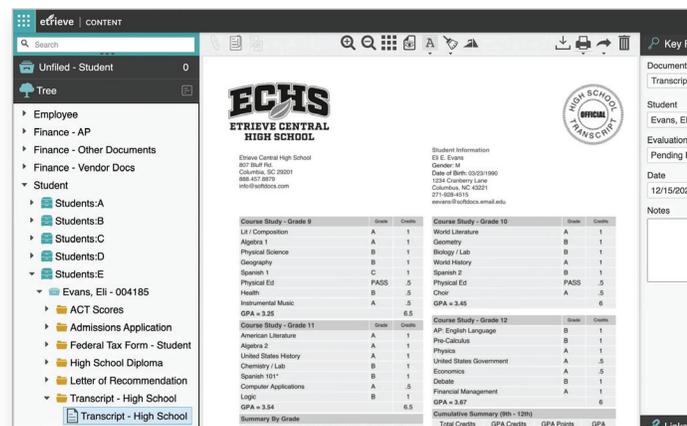
2. Electronic Forms and Workflow

Here's what Banner Document Management actually does: stores files. Here's what it doesn't do: everything else. No web forms, no routing, no approval workflows, no automation, no e-signatures.

This absence of capability forces dependence on manual paper-based processes or third-party solutions like e-signature platforms, form builders, and workflow management systems that present significant integration challenges.

Under the hood, Banner Document Management relies on a third-party application from OpenText Corporation — the AppXtender product suite — for its imaging and archival functions, with Ellucian providing the integration to Banner and related education-specific components.
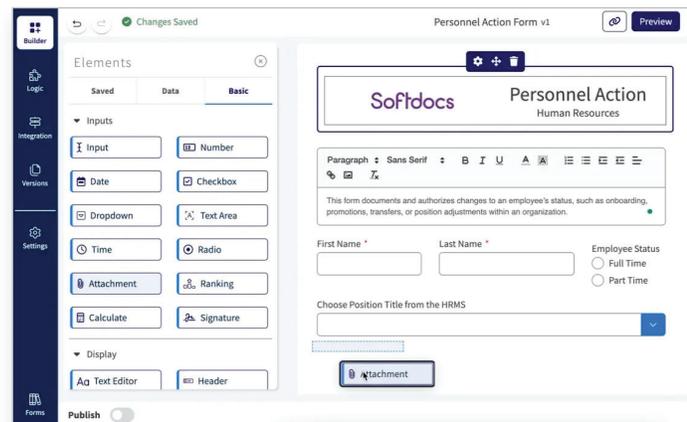
In contrast, Softdocs is the sole developer and owner of its platform, purpose-built for education rather than rebranded or white-labeled from another vendor. This ensures complete product control, deeper integration capabilities, and a unified vision for ongoing innovation.

Our solution brings electronic forms and workflows into the modern age. With drag-and-drop form design in a pure browser-based authoring environment, WCAG 2.2 compliance out of the box, and mobile responsiveness by default, it delivers flexibility, accessibility, and efficiency from day one. Forms can include logic-based validation, reusable saved sections, and seamless ERP/SIS integration — and are easily extended with an online forms library. (Also, they look great.)

Users moving from rigid, IT-dependent systems like BDM will find the Softdocs Platform transforms workflow creation with a no-code, user-friendly builder, conditional routing, and real-time data integration from any ERP and SIS, not just Banner. The result: more departmental control and far less IT intervention.
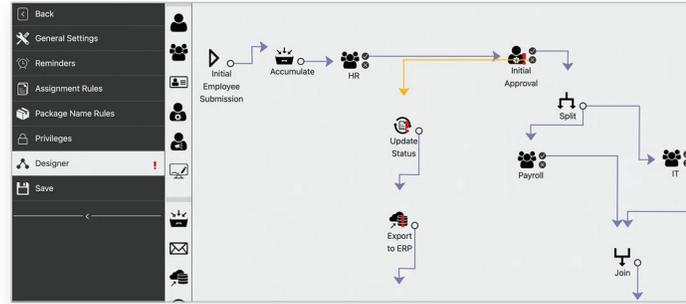
3. System Integration

BDM's integration reflects an on-premises era. It supports only basic connections with Banner Self-Hosted and lacks compatibility with today's leading systems like Banner SaaS, Colleague, Workday, Jenzabar, and Anthology. This gap often forces institutions to rely on manual uploads or brittle custom scripts to keep systems aligned.

The Softdocs Platform provides modern APIs for secure, bi-directional integrations with ERP, SIS, and CRM systems, eliminating integration fragility while ensuring predictable, structured, and documented data exchange.

4. Compliance and Security

BDM provides core audit logging and version control. With role-based access, conditional controls, immutable audit trails, and configurable retention policies, every document, action, and change is tracked and protected.

Backed by certifications including SOC 2 Type II, NIST SP 800–53, CJIS, and TX-RAMP Level 2, Softdocs delivers industry-leading peace of mind.

"We were surprised at how easy implementation and training was and how well it worked out of the box. Softdocs seamlessly integrates with our ERP and other systems, saving staff time by eliminating data re-entry while providing students with a modern digital experience. The Softdocs service team was top-notch — very supportive and walked us right through the process."

MK Smith, Director of Application Services
Seattle University

5. Accessibility and Mobility

BDM was built for an era where desktop access was the norm. Without any web interface or mobile capabilities, it falls short of the modern, connected experience users expect today. For institutions committed to digital transformation, BDM represents a dead-end technology that will never escape its on-premises limitations.

The Softdocs Platform eliminates that friction with a single, cloud-native experience that's accessible anytime, on any device. Whether on desktop, tablet, or mobile, users enjoy the same functionality, intuitive design, and WCAG 2.2 AA-compliant accessibility, making it easier for everyone to work or submit forms from anywhere.
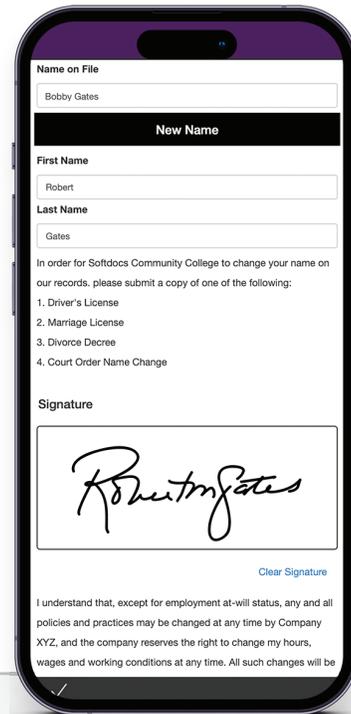
Cloud-Native vs. On-Premises: A Strategic Decision

BDM will never move to the cloud. It's an on-premises system that keeps your IT team managing hardware, planning upgrades, and maintaining infrastructure instead of working on strategic initiatives. Without cloud capabilities, BDM can't deliver the mobile access, automatic updates, or elastic scalability that modern higher education demands.

The Softdocs Platform is cloud-native by design. Multiple layers of redundancy and disaster recovery protect against ransomware and data loss. Your team gets the same intuitive experience on any device, anywhere. No capital investment for scaling. No maintenance windows. No version anxiety. Just a platform that stays current, secure, and accessible so you can focus on your mission instead of your infrastructure.

Eight Next-Gen Capabilities

Once considered innovative, BDM has been eclipsed by modern platforms that automate, integrate, and intelligently process information. The Softdocs Platform combines cloud-native architecture with built-in AI, automated updates, and robust scalability to turn what was once a document repository into a complete ecosystem for digital transformation.

1. Automated Deployment Upgrades

BDM can be part of the Ellucian quarterly releases, but that isn't guaranteed. With Softdocs, upgrades are no longer a budget line item or an IT headache. With the Softdocs automated deployment approach, updates roll out seamlessly — often over the weekend — with no disruption or downtime. New features are enabled by flexible feature flagging for staff control. No more paying for upgrades, no more scheduling outages, and no more lost time. Just read the release notes on Friday and return on Monday ready to go.

2. Intelligent Transcript Processing

All BDM users require another application to handle transcripts, and even then, the document and batch uploading capabilities are limited and cumbersome. With Softdocs, transcript processing is native. Softdocs Intelligent Transcript Processing (ITP) uses generative AI to "read" transcripts like a human, converting class names, credit hours, and grades to clean, structured data. Simple, intuitive, and integration friendly.

3. Future-Proof Integration

With the Softdocs Platform, organizations can deploy stable, API-based integrations that are completely ERP and SIS agnostic — ensuring your document management platform works seamlessly with whichever core systems you use, now and in the future. As an Ellucian partner for more than 25 years, with over 1,000 Ellucian clients, Softdocs brings a proven history of reliability and robust, bi-directional integrations that move documents and form data directly into your core systems.

"After 10+ years with a legacy document management system, we chose Softdocs. Their system offers unlimited eForms and eSignatures, which is a significant advantage over using multiple solutions and paying for each envelope or document. We migrated over 8 million documents from our legacy system, redesigned workflows, and consolidated 10+ separate forms into a single super form.

Khalid Tariq, Associate Vice Chancellor, Information Systems
UMass Global

4.   Native, Unlimited eSignatures

With no electronic signature options in BDM, those who need this functionality are forced to use Docusign, Adobe Sign, or similar tools at additional cost. In the Softdocs Platform, legally compliant eSignatures are a native capability, and they are unlimited. Customers frequently consolidate their disparate applications for document management, workflow, and eSignatures into one Softdocs instance.

5.   Intelligent Document Processing

One of the platform's best-kept secrets is how Intelligent Document Processing (IDP) works behind the scenes to automatically read and categorize documents as they're captured. Documents that are batch uploaded, virtually printed, emailed, or scanned can employ IDP to extract and classify data instantly. This generative AI system is a generational leap over legacy OCR tools. Less manual entry, fewer mistakes, and faster processes.

6.   Data Hygiene

One of the biggest improvements users see when moving from BDM to Softdocs is better data hygiene. Our configurable, clearly labeled fields eliminate the messiness and outdated nature commonly found in BDM installations. During the ETL migration process, our transformation step cleans up existing issues and applies retention policies retroactively.

7.   Drag-and-Drop Forms and Flow

BDM doesn't have forms — it only stores files. By contrast, Softdocs Forms provides a drag-and-drop builder to accomplish simple requests as well as complex, multi-step applications packed with dynamic fields, integrated datasets, and smart logic. It's also fully WCAG 2.2 AA compliant for both form creators and users, ensuring maximum usability for everyone. Workflows are also designed in a drag-and-drop interface. They run fully automated, with approvals and routing adapting in real time to responses or roles.

8.   Dashboards for Full Visibility

BDM has limited visibility and flexibility to deliver information without extra digging or custom configuration. Dashboards in Softdocs provide a clear, user-friendly view of your data that continuously updates, like a command center for forms and documents.

Best-in-Class Services and Customer Support

At Softdocs, the difference isn't just the tech, it's the people. Our central, long-tenured team trains hands-on every week and uses a thoughtful, tiered triage approach to ensure your case reaches the right expert right away. You won't wait days for a call back or chase down answers. Instead, emails get answered, questions get solved, and you always know who's in your corner. Backed by a company committed to education and government, Softdocs support isn't just functional — it's personal, consistent, and refreshingly human.

1. You're paired with senior professional services leaders
2. Together, we map out a fixed-fee migration plan with clear timelines
3. You get a dedicated team that stays with you through migration and beyond
4. You work directly with our project managers, architects, and consultants
5. After go-live, you gain a permanent, dedicated Client Success Manager advocating for you

Our Net Promoter Score is 73 — one of the best — backed by real feedback and rave reviews. And our support team consistently hits a 98% satisfaction rate.

"Out of all vendors, only Softdocs took the time to understand our needs and have a conversation with no pressure for a sale. It was really comforting to us to know that a company took some time to invest in us."

Mike Mullenix, Business Applications Support Engineer
Education Affiliates

Dedicated Data Migration Services

Softdocs has helped hundreds of customers migrate from BDM, ImageNow /Perceptive Content, OnBase, Nolij, OpenText AppXtender, Laserfiche, Docusign, and others. Because of our experience with ImageNow and OnBase, we have dedicated, proprietary migration tools that elegantly transition data from those applications into the Softdocs Platform.

1b+
documents
migrated

Customer Support

While some companies have shifted support offshore — leading to long delays and limited product knowledge — Softdocs has kept support onshore and close to home.

Our central, long-tenured team trains hands-on every week and uses a thoughtful, tiered triage approach to ensure your case reaches the right expert right away. You won't wait days for a call back or chase down answers. Instead, emails get answered, questions get solved, and you always know who's in your corner.

Softdocs support, service, and developmental engineers offer:

✓ **Rapid, responsive, and personable support with frequent touchpoints**
A dedicated support representative is assigned to each case, stays with it until it's resolved, and provides regular progress updates.

✓ **Practical solutions driven by deep expertise in education and government processes**
This helps organizations across the public sector create new workflows and design and implement forms that are highly effective and easy to use.

✓ **Collaborative processes that combine skill sets and knowledge on a case-by-case basis**
Support technicians collaborate to address issues and devise solutions that yield a lasting solution.

✓ **Access to decades of combined document management experience**
This in-depth industry knowledge enables schools to capture, process, and aggregate student information effectively. It also helps ensure tight integrations with the SIS and other student-related systems and business office applications.

✓ **Up-to-date knowledge on security and compliance**
Continual education from the team helps clients stay up-to-date with the latest regulatory changes and maintain the security of student and staff data.

Backed by a company committed to education and government, Softdocs support isn't just functional — it's personal, consistent, and refreshingly human.

Holding Ourselves Accountable: Customer Support KPIs

Category	Goal	2023	2024	2025
First Response	< 30 minutes	150 min	70 min	33 min
Customer Satisfaction	> 96%	95%	97%	98%
Average Resolve Time	< 3 days	6.06	4.54	3.5

Your Migration Roadmap

MONTH
1

Migration Kickoff

- Project welcome call and team introductions
- Environment provisioning and initial Softdocs Platform installs
- Deployment call, SSO setup, and technical configurations
- Discovery preparations for in-scope departments

MONTH
2

Early Configuration

- Discovery sessions with departments reviewing existing document storage practices and identifying opportunities for forms, workflows, and automation
- Documentation delivered for review
- Initial Softdocs Document Management tree and security configuration aligned to departmental needs and legacy BDM folder structures
- Migration workbook created and test imports analyzed against existing BDM document retrieval/search scenarios

MONTH
3

Configuration and Testing

- Softdocs Document Management configuration finalized, including folder structures, metadata, and security roles
- User Acceptance Testing (UAT)
- Migration test imports and validation against BDM document retrieval/search scenarios

MONTH

4

Migration and Core Training

- Pre-freeze export/import and validation from BDM, ensuring data integrity for documents
- Freeze migration export/import and final validation, including version history and audit trails where applicable
- Administrator training for IT Admins transitioning from BDM desktop administration to SaaS-based Softdocs Platform management
- Content Go-Live with End User training for departments

MONTH

5

Rollout and Supplemental Training

- Supplemental solutions training highlighting key differences from BDM
- Forms Discovery: Consultative sessions with admins and key users to define forms and workflow requirements for introduction into the Softdocs Platform

MONTH

6

Advanced Forms and Integration

- Forms Design and Training: Security, advanced form/workflow design, and automation logic, implementing Flow and API-driven processes
- Integration & Connection Testing: Establishing bi-directional connections with Banner systems, replacing any manual processes previously dependent on BDM
- Progress review: troubleshooting, refresher training, and design assessment

MONTH

7

Transition and Project Closure

- Final migration tasks completed
- Verification of retired BDM environments
- Wrap-up of training and supplemental support
- Project closure and transition to ongoing support

Softdocs

The Softdocs Platform is the leading document management and process automation solution for higher education, K-12 districts, and government agencies.

Many Softdocs customers choose our platform to replace outdated, legacy document management systems in order to gain modern features like workflow automation and no-code forms design.

Softdocs has helped more than 100 organizations migrate from BDM, OnBase, and others with more than one billion documents successfully moved.

Platform Overview

Document Management
Secure student records, HR, finance, and other documents within an integrated repository.

Workflow Automation
Design digital, no-code workflows to transform, simplify, and enforce key business processes.

User-Friendly eForms
Build user-friendly eForms to securely and reliably capture precise key data.

Unlimited eSignatures
Expedite approval processes with unlimited electronic signatures.

Intelligent Document Processing
Automate data extraction, classification, and validation for every captured document.

Intelligent Transcript Processing
Convert document-based transcripts into structured data with unprecedented speed and accuracy.

See it all in action:
softdocs.com