

Automating Content & Processes in Human Resources

RPI Consultants White Paper

Human Resources departments are managing more sensitive content and complex processes than ever before. When you implement enterprise content management in Human Resources, you can create more transparency, ensure better security, and demonstrate compliance when managing important employee records.

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Overview

Human Resources (HR) departments are managing more sensitive content and complex processes than ever before, across all industries and for companies of all sizes. At any given moment an HR department's focus may be on employee recruitment or retention, benefits administration, legal & regulatory compliance, or other employee-focused services, all while having to abide by strict legal requirements.

Particularly within the context of manually collected data — and the delays and errors that usually result from this process — it is easy to see how even simple employee requests often require a significant amount of effort from HR departments. Implementing effective enterprise content management (ECM) solutions in HR departments holds the potential to reduce these errors and delays, create additional transparency within processes and employee records, and help HR leaders provide regulatory compliance.

HR Challenges and Risks

One of the most common challenges faced by HR Departments is the cost of storing physical files, both on and off-site, including sometimes even storing them with a third party company. This challenge is exacerbated for clients with human resource responsibilities spread across multiple geographic locations.

The consequence of distributed HR services, or even just lack of effective content and process automation, is that it creates inconsistencies through insufficient or non-existent standard operating procedures. This creates huge costs for organizations in the form of poor financial accounting, as well exposing them to legal liabilities for not meeting regulatory requirements, such as not being able to easily produce employee records, hiring documents, or termination records.

Additional challenges facing HR departments are producing employee-related documents for litigation and eDiscovery purposes, and complying with record retention policies and regulations. Organizations spend a lot of time and resources creating internal policies and procedures to protect themselves during litigation, but if the HR department can't produce relevant documentation it puts the entire organization at risk during employee disputes.

HR Challenges & Risks

Due to the sensitivity of records and various legal requirements, HR departments face huge challenges, risks, and liabilities in managing employee content and processes.

During critical human resource-related processes, data and content can be misplaced, misinterpreted, or simply missed.

- Employee Application Submission
- Employee Application Review & Evaluation
- Benefits Elections & Open Enrollment
- Employee Information Change Requests
- Employee Incident Reports & Resolutions
- Employee Terminations
- Employee Records Retention
- Litigation & eDiscovery

Products & Solutions

Human Capital Management, or Human Resources, is a huge function of any organization and has many distinct processes and workflows. Likewise, there are a large number of technology vendors and products that are available to support these processes, including Enterprise Resource Planning software (ERP), Human Resources Information Systems (HRIS), and Enterprise Content Management (ECM) platforms.

Enterprise Resource Planning

ERP software, such as [Infor Lawson](#), provide a number of Human Capital Management (HCM) and HR solutions, including everything from employee data management, payroll and benefits, and employee self-service. The primary benefit of ERP implementations is that they typically include modules and features for all back office and administrative departments, such as procurement and accounts payable. This allows organizations to share license and support costs across departments. Still, most ERP solutions will not provide many features or functionality to support records or document management. To address this gap, most organizations will implement Enterprise Content Management (ECM) software, such as [Perceptive Content](#) or [OnBase by Hyland](#), and then integrate it closely with their ERP.

Human Resources Information Systems

Some organizations will elect to implement more specialized HRIS systems, which provide the benefit of being tailored specifically to HR departments and processes whereas ERP systems may require extensive configuration to provide the same functionality. HRIS systems manage employee data including employee information, hiring / termination dates, and salary and benefits information.

Enterprise Content Management

Enterprise Content Management (ECM), or Enterprise Content Services, helps to fill these gaps by providing comprehensive features related to the management of documents and records, and the business processes they drive.

ECM platforms allow HR departments to effectively capture & index, process, and manage access to employee records and files in a consistent and consolidated environment using process and document level security settings.

ECM platforms are integrated directly with ERP and HRIS systems to exchange data and content.

Document Imaging v. ECM

There are a number of document imaging technology providers available to HR departments that may have a lower cost to implement and support than a full enterprise content management platform.

HR departments should evaluate all requirements before making such an important decision, but one of the biggest benefits of choosing to implement a full ECM product is the ability to grow and scale over time.

ECM securely supports multiple processes and departments within the same implementation. These platforms also usually include built-in integrations to connect with other important business systems.

HR Automation Solutions

Each industry, organization, and HR department is unique. When considering which technology or products to implement, there are a number of questions to ask and processes to evaluate.

Consider the following:

- HR Department Functions & Processes
- HR Department Teams or Locations
- Document & Data Capture Sources
- Employee File Volume and Document Types
- Records Retention Policies
- Existing HRIS, Benefits, or ERP Systems

Enterprise Content Management

ECM platforms offer a huge variety of features, functions, and integrations to quickly and easily automate many critical HR processes and content storage requirements.

Capture

ECM solutions should provide a number of ways to capture internal and external content, including physical document scanning, email capture, fax capture, file import, and even electronic data feeds such as EDI or XML.

Index & Organize

With content securely captured into your ECM platform, the next step is to index and organize documents and records by relevant keywords or identifiers. This helps prepare documents to be routed into business processes or workflows, and makes content easier to search and retrieve.

Especially in HR solutions, the content foldering is very important and refers to the creation of digital folders that replicate physical file folders, such as an employee file or incident report.

Workflow

With content and folders successfully indexed and organized, records or folders can be passed



into digital workflows to be processed. Within an ECM solution, entire business processes such as employee hiring or on-boarding can be replicated with digital inboxes and out-boxes.

Using ECM, you can automate repetitive or logic based tasks, such as routing content to specific users or departments, obtaining approvals or capturing feedback, or complete other processes such as integrating data with your ERP or HRIS.

Search & Retrieve

One of the biggest benefits to using an ECM solution in Human Resources is the ability to easily search and retrieve content. With a combination of index keys and foldering, HR professionals can quickly find employee files on demand without searching through a file cabinet or requesting records from off-site storage.

Integration

With important data and content stored in the ECM platform, it is important to set up integration points with your ERP or HRIS system. Push / pull data integration can be created using something as simple as a text file exchange or something more sophisticated such as a direct ODBC connection to your ERP or HRIS database.

Integration allows employee data to be updated and synchronized automatically between all our important HR systems and databases.

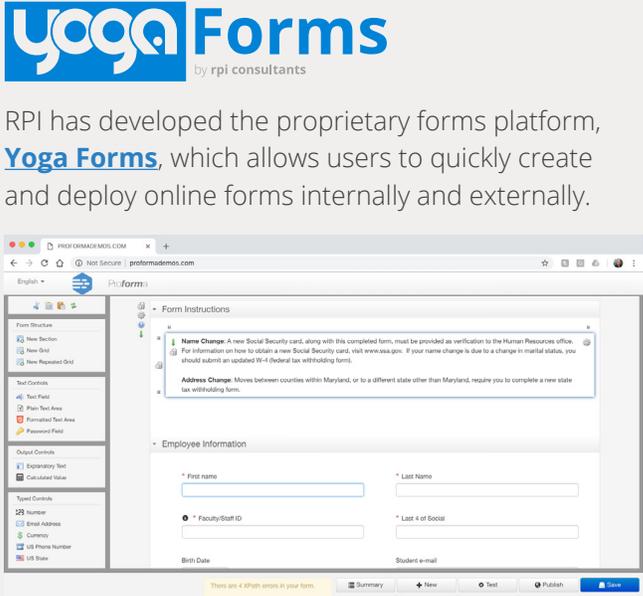
Retention Policy Management

Finally, ECM platforms also let you create and execute records retention policies. This is particularly valuable to HR departments because it allows you to purge unnecessary employee files to reduce storage costs and mitigate potential liability associated with eDiscovery.

Digital Forms Solutions

Most HR departments rely heavily on forms to capture important candidate and employee data. Typically, this includes physical paper forms that must be transcribed by HR professionals into an ERP or HRIS system. This often results in data entry errors which creates problems and delays throughout HR business processes.

To solve this problem, HR departments can implement digital forms solutions integrated with their ECM platform and workflows. These solutions typically provide a forms builder interface that allows HR users to quickly create flexible digital forms that can be published and filled out by internal and external users, such as employee applications, employee change requests, or incident reports.



Yoga Forms
by rpi consultants

RPI has developed the proprietary forms platform, **Yoga Forms**, which allows users to quickly create and deploy online forms internally and externally.

The screenshot shows a web browser window displaying the Yoga Forms interface. On the left is a sidebar with various form controls like Text, Form Section, and Password Field. The main area shows a form titled 'Form Instructions' with a 'Name Change' section containing a warning message and an 'Address Change' section. Below this is an 'Employee Information' section with input fields for First Name, Last Name, Faculty/Staff ID, and Last 4 of Social. At the bottom, there are buttons for Summary, New, Test, Publish, and Save.

Content and data captured within digital form fields provides the benefit of being discrete data that can be integrated directly into an ECM, ERP, or HRIS system, eliminating manual data entry and any associated errors and delays.

Use Cases

Employee File Management

As discussed previously, one of the most important ECM solutions for Human Resources is Employee File Management. This solution creates efficiencies and helps HR leaders meet a number of challenges, including reduced physical document and paper storage, automated employee data entry and reconciliation across all HR systems, and improved business processes through digital workflow.

Within employee file management solutions, document, data, and other content can be captured through in any format or from nearly any source, including scanning, email, and fax. Those documents are then indexed against existing employee data, such as employee ID, employee name, date of birth, hire date, etc. Using your ECM, these index keys can be automatically assigned using a dynamic lookup to your HRIS database. Documents can then be associated with the appropriate folders and routed into content workflow.

When documents or folders enter an ECM workflow, any number of automated tasks, approvals, or updates can be completed. For instance, employee files can be checked for required documents or automatically find other documents associated with the employee. For new employees, data can be automatically integrated with your HRIS to create the employee record. Additionally, sub-folders can be created for specific events or to keep confidential information that is not available to all users.

Following successful completion of workflow, employee records and folders are securely stored in the ECM repository for later retrieval, auditing, or eDiscovery purposes. Retention policies are also applied to automatically purge documents based on configured timelines and requirements.

Employee On-boarding

Another popular ECM solution for HR is Employee On-boarding. This solution introduces an automated checklist which can be assigned to employees and keeps them accountable for work and documents they have yet to complete. This can also be automated throughout the entire workflow process using foldering. This solution is similar to Employee File Management, however this content foldering provides the opportunity to track the employee file throughout the entire workflow process as documents are captured during employee on-boarding.

There are many benefits to automating employee on-boarding. For example, the on-boarding folder itself is a comprehensive view, eliminating the need to search for and retrieve individual documents. Within the folder and the attached on-boarding checklist, HR professionals can quickly and easily see which documents have been captured and which are still outstanding.

Products such as Perceptive Content's Retention Policy Manager and the Retention Document Manager within OnBase by Hyland also monitor documents and automatically purge them based on retention policies, freeing up storage space and the time it takes to manually Delete documents.

Summary

Few departments and workflows within an organization are as responsible for managing the quantity and sensitivity of documents, records, and other content, as the Human Resources department. Performing these duties without any form of automation or content management system is overwhelming. HR departments can become completely overburdened with responsibilities like document storage and retention policy management, making it extremely difficult to perform basic functions like hiring, process change requests, or documenting incidents for terminations.

Enterprise Content Management solutions, like [Perceptive Content](#) or [OnBase by Hyland](#) offer a variety of features, functionality, and integration with your ERP or HRIS, allowing you to eliminate manual data entry processing from Human Resources and creating transparency within your organizations' important employee records. Integrating digital forms solutions, like Yoga Forms, further automates data collection and processing by capturing discrete data from forms like employee applications, surveys, and change requests.

Automating your Human Resources department, including important processes like Employee File Management and Employee On-boarding, helps to reduce errors and delays, creates transparency and efficiency, and ensures compliance for sensitive documents and retention policy management. Contact RPI Consultants today for more information on which products and solutions can help your HR department organization, process, and manage important employee content and data.

About RPI Consultants

RPI Consultants is an industry leader in Enterprise Resource Planning, Enterprise Content Management, and Business Process Automation technical consulting services. RPI has extensive experience designing, implementing, and supporting Infor [Lawson](#), [Perceptive Content](#) (ImageNow), [Kofax](#), [OnBase by Hyland](#), and [Brainware by Hyland](#) (formerly Perceptive Intelligent Capture).

RPI employs approximately 100 full time consultants, developers, and solution and technical architects with specific experience and expertise across many industries and solutions. RPI is based out of Baltimore, Maryland, with additional offices in Tampa, Florida, and Kansas City, Missouri.

RPI provides professional and technical services for new installations and upgrades, solution and technical health checks, new solution designs and implementations, custom development and system integrations, custom training, and environment and product migrations. RPI is also an authorized license reseller. For more information about RPI Consultants, including license and service quotes, product demonstrations, or general inquiries, visit www.rpic.com.



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