Goodbye Paper
Hello Freedom
IntelliChief White Paper Series

IntelliChief ECM for Human Resources and Human Capital Management
Executive Overview

Human Resources and Human Capital Management are among the most document intensive areas of your organization.

Enterprise Content Management (ECM) enables you to automate the information processing activities faced on a daily basis, while conveniently organizes them for quick electronic access and long-term archival.

With numerous paper and electronic file documents generated when creating and maintaining Human Resources department files for each employee and 1099 contractor, organization is imperative. It starts with having the ability to capture and structure all information befitting your organization’s business processes, all through automation. Password protected access is also automated – a simple keyword search provides the information to your desktop or mobile device. The workflow automation provides you the ability to route documents to staff and vendors electronically for prompt action. Structured archival enables secure long-term, low-cost storage.

IntelliChief’s Human Resources – Human Capital Management (HCM) benefits include:

• **Records Protection - Disaster Recovery/Business Continuity** – electronically protecting all your company’s resource records is imperative to keeping the business running, through temporary and catastrophic occurrences, causing loss of paper-based information due to wind, water, fire, theft or misplacement.

• **Documentation Consolidation** – information in every format, paper or electronic, is uniformly formatted and stored together based on your specific criteria. (Capture information and convert paper documents to electronic files with an unprecedented level of power, efficiency and ease. Manage all personnel documents in a single, searchable system that improves information retrieval capabilities.)

• **Information Validation** – when connected with your enterprise resource planning (ERP) or Human Resources management systems, IntelliChief validated and updates stored information in these programs, assuring data integrity.

• **Interdepartmental Workflow** – IntelliChief puts the ‘enterprise’ in enterprise content management (ECM) – the system is created to enable automated workflow, interconnecting departments, eliminating frustrating information silos. (Streamline internal procedures by automating document routing and approval.)

• **Cost Reduction** – physical paper files are costly to create, access and update, both in HR staff’s allotted hands-and-feet time, and time away from constructive, strategic pursuits to meet your goals. On- and off-site paper file storage is significantly reduced or eliminated, saving you square footage and budget.
The Need Identified

According to Forrester Research, “Human Resources departments typically use 50% of their staff’s time handling manual, mostly paper-driven personnel administrative tasks.”

As Human Resources impact continues to expand within organizations, you and your staff are losing half your time to non-strategic tasks. The critical contributions your company needs are strategic as corporate environments evolve, and resource planning rapidly becomes vital to planning and assurance of optimized operations, both during transitional periods and continuing daily functions throughout the organization.

These daily manual administrative tasks must be automated to allot needed resources – yours and those throughout your company – to be utilized for their strategic and executional contributions.

ECM’s Elevating Abilities

Tellingly, the U.S. National Archives & Records Administration states that 60 percent of companies that lose their data are out of business within six months of the causing disaster. That stat’s startling, though it needs to be heard, and act on. Particularly in-light of at-risk paper documents files containing irreplaceable employee information, data that you require by daily need and ongoing regulatory compliance.

Your businesses’ information is your prosperity. Safeguarding it is your livelihood. Making data protection a cornerstone of your company’s recovery and continuity plan becomes vital. Thankfully, resources exist to keep this process functional and cost-effective, during normal operations and in time of extraordinary need.

It starts with assurance that includes protection and continuous access of all resource, proprietorial, operational and transactional information. With much of it in paper format or electronic files stored on various dissociated servers, platforms, personal computers and mobile devices, it’s all in-play when a wind, water, fire, negligence or theft-originating disaster occurs.

There’s solace in avoidance of a disasters’ consequences, with a bonus – it organizes your organization. By utilizing your enterprise resource planning program (ERP) or line of business system’s ability to connect with an automated document management/enterprise content management (ECM) program, you’re able to capture all the information that must be preserved, in any format it originates, throughout your organization. This is useful for current documentation, along with converting vulnerable existing/backlog paper in on-site file cabinets and off-site storage, as well as files on employees’ company-issued and personal PC’s, tablets and phones.

Once this information is captured and electronic file-formatted in your ECM, it’s synced to the existing data stored in your ERP, HRIS or HCM system, updating in real-time, with secure, permission-based access available at any time from any Internet-connected device. This provides the continuity lifeline – if your facilities suffer damage, and staff are conducting their duties remotely to continue businesses’ operations, all the information needed is accessible for them to do so, just as if it were any other day. Which on those particular days, everyone wishes they were…

ECM-ERP integrations also facilitate ease of off-site data center backup of your servers, enabling system replication, to provide IT staff a convenient, cost-effective way to protect data, in case of damage to/loss of on-site servers. Time or physical access may not be available to get them out of harm’s way during the disaster.

From a more optimistic vantage… During typical daily operations, ECM benefits shine brightly. The ECM-ERP/line of business connected system creates an automated environment of instantly-updated data, grouping related documentation for optimal organization. This also automates interdepartmental workflow, reducing (your) resource time and cost of your business processes functions. Paper file storage is significantly reduced, freeing square footage for needed allocation. Information security is exponentially increased – no lost data, no lose ends.
Beneficial Benefits

According to The Association for Information and Image Management (AIIM), the following 5 elemental areas encompass benefits of ECM for Human Resources in achievement of goals throughout companies.

1. Creating efficiencies in Employee Lifecycle Management, including:
   - Recruitment – capture, store and route applications and resumes
   - Onboarding – automate new employee procedures
   - Employee file management – stored in a single location
   - Offboarding – automate employee exit procedures
   - Policy and certification management – ensure policies and procedures are current and compliant.

2. Overcoming common HR inefficiencies, encompassing:
   - Paper-intensive and time-consuming processes
   - Controlling and tacking access to employee files
   - Keeping up with ever-changing regulations and privacy requirements
   - Employees’ expectation to view their personnel files at any time creates privacy concerns and time constraints
   - Storing and maintaining the integrity of paper files.

3. Compliance assistance: A growing mountain of documents coupled with ever-changing regulations and privacy requirements makes it difficult to decipher if a document should be stored or disposed of. Reducing cost and risk, ECM ensures the proper business practices are followed by digitizing files and automating the process.

4. Collaboration enhancement: Employees expect 24/7 access to information such as company updates, payroll and training. ECM realizes this goal in a secure and cost-effective manner. Utilizing an ECM solution gives employees flexible, on demand access to the information they crave. HR can easily determine if a document was viewed or modified and customize an employee’s access privileges.

5. Cost reduction throughout organizations: HR’s support cost is an estimated $1300 per employee annually. That’s about $1,300,000 for a company with 1000 employees. An ECM can greatly reduce this cost by eliminating redundant processes and providing self-service platforms for employees.
Steps to Employ

Here’s how an ECM system impacts Human Capital Management lifecycle processes:

**Recruiting and Selection**

The ECM system captures, stores and routes applicant files through automation, freeing recruiters from paper-based manual processes, allowing them to find the best candidates faster, by capturing, storing and routing applicant files electronically.

With applicant information centrally located in the ECM, employee recruitment staff:

- Access all the information they need, when they need it, to make smarter hiring decisions
- Spend more time identifying the best candidate for the job, and less time organizing paperwork and supporting documentation
- Create consistent offer letters with document templates, enhancing consistency of the hiring process
- Support compliance efforts by determining automated permission rules of who can see applicant information within the organization, conveniently sharing candidate information with interdepartmental colleagues during the new hire selection and offer process.

Recruiting and selecting the right employees is vital to your organization. With an ECM system integrating with your existing HR systems, including human capital management (HCM) and human resources information (HRIS), you get more out of the software you’ve invested in:

- Capture and organize all related documentation
- Identify and hire the best candidates faster than competitors
- Ensure real-time records synchronization amongst systems, assuring accurate processes amongst your HR systems.

**Employee Onboarding**

With complete visibility into onboarding processes, ECM ensures tasks are completed on time.

The system gives HR staff the tools they need to better manage the employee onboarding process and provide new staff with as smooth a transition as possible.

Through automation, increased visibility and centralized information management, the system supports effective onboarding and ultimately accelerate processes HR provides to new employees for their role within the company.
The ECM solution for employee onboarding:

- Provides a holistic view of all related information in a single location
- Enables staff to easily track the entire employee onboarding process and monitor tasks across departments
- Improves the service HR provides to new employees, ensuring they are ready for work their first day.

Companies benefit when new employees feel comfortable and well-prepared to do their jobs from the beginning.

By completing the onboarding process efficiently and accurately, organizations:

- Provide new employees with a positive first experience in their new job; a productive start
- Monitor the status of the onboarding process through each step
- Better equip new staff with the tools they need to positively contribute to the company.

Employee File Management

ECM ECM provides Human Resources staff with a single location to store employee files. With all employee documentation, the program automates document organization and retention, helping companies meet compliance standards and regulations.

ECM enables HR departments to better manage employee files, equipping permission-based personnel with instant access to critical employee information, reducing the time spent searching for information while increasing security and supporting compliance initiatives.

With ECM, HR staff:

- Capture and store employee files electronically, whether they’re scanned, faxed or emailed
- Retrieve employee documents and data without leaving their related line of business ERP, HRIS or HCM systems
- Provide better service by rapidly responding to employee and supervisor requests.

With all employee files managed electronically in an ECM system, organizations ensure that critical employee information is secure.

The ECM system also helps HR departments to:

- Control who has access to the HR system and what they can do
- Instantly determine compliance standing with real-time reporting into the status of required employee documentation
- Facilitate effective document retention in accordance with federal, state or local employment policies.
Policies and Procedures

ECM’s automation stores and updates policies and procedures across systems for distribution as needed, ensuring all employees are aware of the most current policies while also supporting compliance.

Efficiently create, distribute and track employee acknowledgement of policies and procedures, helping ensure HR compliance while reducing associated administrative tasks and costs of filing, copying and mailing documents.

ECM enables organizations to streamline policy creation and approval by automatically tracking all updates and revisions.

From within their ERP of line of business system, HR staff:

• Quickly send email notifications containing links to policies in the ECM system to the entire workforce or specific groups
• Make policy revisions directly in the ECM system, simultaneously notifying all affected employees, accelerating distribution
• Enforce timely acknowledgment while reducing the risk of errors or oversights.

The ECM system centrally stores all policy documents, training videos and other supporting content. As a result, HR staff:

• Improve employee access to crucial information
• Facilitate easy employee review and acknowledgement
• Automatically track employee acknowledgment and identify any delinquencies
• Easily notify individuals of noncompliance and resolve any issues prior to an external audit.

Employee Separation

From benefits to payroll instructions, ECM enables HR staff to automate the management of activity processes for departing employees

Whether employee separation is through resignation or termination, it’s critical HR staff effectively follow their organization’s employee offboarding processes.

Using ECM, HR staff can automate the management of the termination process, including:

• Ensure employee offboarding tasks are completed in a timely manner so proper systems and building access are removed
• Notify Payroll with instructions about how to process final paychecks
• Give Benefit’s staff instructions regarding what benefits will continue and for how long.
For HR departments, ECM’s automated enhancement of employee offboarding processes:

• Enables staff to easily track the entire employee offboarding process and monitor tasks across departments
• Ensures the separated employee no longer has access to the organization’s applications, critical information and facilities
• Provides a holistic view of all related information in a single location
• Eliminates the cost of a custom integration with applications including HCM systems, easily connecting HR staff with the information needed to properly offboard employees
• Decrease time and costs by reducing the paper and manual tasks associated with employee offboarding.

Successful Impact

IntelliChief ECM works for HR – protecting your resource records while providing access in a convenient, cost saving automated environment. See how – contact us for a program view at your convenience: www.intellichief.com/contact-intellichief.

About IntelliChief, LLC

IntelliChief enterprise content management (ECM) provides enterprise-class business processes document management and workflow automation solutions for any IT platform. With decades of expertise in the market and seamless integration with leading enterprise resource planning (ERP) and line of business systems, IntelliChief thoroughly automates companies’ document management, achieving full ROI typically within a year of implementation. Users can create, capture, manage, archive, retrieve and distribute mission-critical documents directly from their familiar ERP screens, automating and streamlining business processes workflow throughout their organization.


IntelliChief, LLC
13095 N. Telecom Parkway
Tampa, FL 33637
813.971.9500
www.intellichief.com