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Streamlining HR Processes Using Enterprise Information Management

The HR Information Management Challenge

Organisations today are inundated with an ever-expanding amount of information. Whether it's content created internally or documents and files received from customers, partners and suppliers, many companies are drowning in a sea of information that grows bigger and bigger each day.

In particular, the HR department must manage a large volume and variety of information that is often highly confidential. Employee records, contracts of employment, payroll information and learning requirements barely scratch the surface when it comes to the plethora of information managed by HR, often in both paper and digital form.

An HR department may have paper employee records and contracts stored in a filing cabinet; use an HR system to manage employee issues and absence requests; an intranet for managing job applications; and network drives for managing general documents. With e-mail and other company-wide applications such as CRM, ERP and document management systems also thrown in to the mix, the result is typically a plethora of information silos with little or no communication between them. This inevitably leads to valuable time being wasted searching for documents and information. This is often compounded by the proliferation of multiple versions of the same file, which results in errors and repeated work. HR teams simply cannot operate at maximum efficiency without the ability to easily access, process and share information that resides in these multiple locations while ensuring that confidential information remains protected.

In order to cope with increasing workloads, it is vital for HR departments to facilitate smooth information management operations and ensure consistent workflows. Simply put, empowering the HR team to quickly and easily locate the exact content they need enables them to be more efficient while improving collaboration with the rest of the organisation.

This paper will explore how HR departments can work more efficiently and streamline key processes by leveraging a metadata-driven enterprise information management (EIM) solution.



What is Metadata and Why is it Important to HR?

Wikipedia defines metadata as “structured information that describes, explains, locates, or otherwise makes it easier to retrieve, use or manage an information resource.” Examples of the most basic metadata attributes associated with documents include ‘author,’ ‘date created,’ and ‘file size.’

By applying metadata to a document or object, the user is effectively describing what that document or object is. For example, metadata could be applied that defines a document as an “employee contract” for “John Smith” with a start date of “January 1, 2017.”

By applying this metadata, information can be found and managed based on “what” it is, rather than “where” it is stored, and the user is able to find that information through multiple routes. Using the example above, an HR Manager could locate the employee contract with a search by that class of documents (“employee contracts”), by employee (“John Smith”) or by a specified date range (“employee contracts from January 2017”). The same file would appear in each search with no duplication of content.

Streamlining Hiring Processes and Employee Onboarding



Hiring and onboarding a new employee can be one of the most manual and cumbersome HR processes due to the many different elements and people involved at each stage. However, many of these processes - such as advertising a vacancy; managing applications; arranging interviews; managing offer letters; signing contracts; creating an employee file and notifying managers of new starters—can all be automated and entirely digitised through by leveraging the workflow capabilities in a metadata-driven EIM solution.

New vacancies can be created in the EIM system and automatically published as job adverts to an intranet or website career page. When an application is received via the website, HR receives a notification that there has been a new application and are able to instantly access not only the application details, but all the related documentation such as cover letters and CVs. This is due to the fact that all the documentation and information that accompanied the application have automatically been given the metadata properties that define it as relating to the specific job vacancy.

Upon identifying a suitable candidate, HR can utilise workflow functionality to automatically notify the hiring department that there is a new application to review and an interview scheduled. Following a successful interview an offer letter can be generated as part of the workflow and sent to the candidate. Automatic notifications will inform management and IT departments of new employee start dates and requirements so that they are prepared.

The EIM solution also removes the need for paper as offer letters and contracts can be electronically signed and shared. Even if the new employee returns a signed paper copy, when the HR team scans and saves it to the EIM system, the solution recognises that it's an updated version of an existing contract and automatically saves the newer version of the contract over the old one. This ensures only one version of the contract exists, removing not only duplicates, but the risk of working on outdated or incorrect information.

Documents which are frequently required for the hiring process such as employment contracts and offer letters can be created as templates within the EIM system and automatically populated using metadata. For example, when creating a contract for a new employee, their name, department, line-manager and other information will be pulled from the metadata about that employee and inserted into the document. This saves huge amounts of time as documents do not need to be created from scratch, and ensures that policies and terms are correctly outlined each time.

Many HR departments are still using inefficient, error-prone paper-based processes for managing contracts. By leveraging an EIM system, an HR team can store and dynamically organise contracts and contract-related information by attributes such as contract type, effective date and lifecycle state. Manually managing and tracking contract workflows also requires a lot of time. By automating contract management processes with an EIM solution, HR will know who is responsible for every task along the way, with automatic notifications and reminders ensuring that all relevant parties know when they are involved in the process and what is required of them. It's even possible to view and approve contracts on the go with an EIM mobile app.

Managing Employee Learning Requirements, Training Tasks and Certifications



In human resources (HR), managing employee records and learning requirements can be made easier, faster and more secure using an EIM solution. Also, EIM provides organisations with a centralised platform for managing all of the processes and paperwork that support the HR function including recruitment, on boarding, training and performance management.

From orientation to new skill development, ensuring employees are trained and prepared is vital for business success - and the responsibility for monitoring and enforcing this typically falls on HR.

An EIM system allows training assignments to be created, completed and tracked seamlessly through simple workflows. For example, if an organisation has annual training requirements for its employees, the training assignment can be automatically created and sent to employees each year. Once the training assignment has been completed, this information is automatically added to the employee's record, and HR and management are notified that the employee training assignment has been completed. They are also able to easily view who still needs to complete the assignment with reminders also being automatically sent to employees and alerts to managers.

This functionality can also be extremely beneficial when it comes to certifications such as ISO 9001 where it's necessary to demonstrate to auditors that certain skills and training requirements have been met in order to meet the certification requirements. The EIM system can provide instant access to this information along with a full audit trail, making it easier to achieve and maintain industry standards and certifications.

The EIM system also stores and manages exam records, certification status and transcripts. Once an employee completes a training program, their certification documentation can be verified by their manager and their certification information is then associated with their training file where it is easily accessible by HR or management. What's more, this gives employees visibility of their own training and certification status, which may not be possible using an HR system.

Managing Roles and Access Permissions



The HR department deals with highly confidential documents and information such as salary details and employee grievances. Ensuring this information is easily accessible - but only by the authorised people - can be tricky to enforce.

Furthermore, authorisation to access certain document types can evolve as employees change roles and departments. For example, the HR Manager may want to allow a manager to access confidential employee information for members of their team. As people join or leave that team, the manager's access permissions should adapt dynamically versus having to be managed manually.

An EIM system can transform the way HR teams control access to sensitive information through a dynamic permissions model driven by metadata. Different roles, teams and access levels can be defined within the EIM system as metadata properties. When a document is created or changed, the classification it is given (i.e. contract, offer letter, appraisal) will determine which roles and teams are able to access it. By making a simple change to that document's metadata, it's possible to instantly update who is able to access it - with different access levels (such as full control, read only, private etc.) available.

This type of dynamic permissions model makes it simple to control and manage who has visibility of, and access to, different types of information at any stage of its lifecycle. This reduces the risk of sensitive employee information ending up in the wrong hands, yet removes cumbersome manual processes from the HR team's workload.

Administering Employee Benefits



Managing employee benefits can be challenging. For example, it may be that after an employee has been with the company for a certain duration they receive additional benefits. By applying metadata to that employee's record such as 'Start Date' and linking them to certain benefit tiers/packages, the HR team can automate this process to ensure deadlines are not missed and benefits are correctly administered. It could be that the HR team receives a notification that the employee is approaching an anniversary and that additional benefits are required - and the employee can also be informed when these benefits have been allocated or updated.

This can help HR teams more effectively manage the complexities of staggered employee start dates and varied benefits packages, while ensuring employee receive their additional benefits on-schedule.

Conducting Performance Reviews



Another process that can be streamlined and automated with an EIM solutions are employee reviews and appraisals.

The EIM system can notify HR, management and employees when a review or appraisal is due and send reminders until it has been completed. All related documentation and review notes can be stored in the EIM system and tagged to the individual employee with metadata. Through dynamic permissions, it is simple for the HR department, employee and their manager to access the documents while ensuring it remains protected from unauthorised access. The employee can then easily search back and see when each appraisal was held along with all related documentation. What's more, the notifications and reminders help ensure that reviews and appraisals actually happen when they are supposed to.

Improving Employee Records Management



Managing employee information is a mandatory responsibility for the HR department. Employee records often either reside in paper form and stored in filing cabinets, or they're managed in a dedicated HR system. Managing employee information in separate systems (and file cabinets) means it's difficult to create a relationship between an employee and their documents and information. The employee record may be paper based and stored in a filing cabinet. That employee's training and certification information may be stored in a dedicated learning management system (LMS), and any grievances may be managed using an HR application.

An EIM system can be integrated with HR systems, LMS, ERP systems and more—enabling it to act as a central access point for every information asset about the people that power your company. Employee records can be related to their contact information, training requirements and other documents and information - and the fact that all this information can be accessed from a single interface makes life easier for the HR team.

Managing HR Policy Review Cycles



It's important that everyone in your organisation is up to speed on current HR policies. If for example, an important change is made to the company document outlining the health and safety policy, the EIM solution can automate the process of assigning a task to all employees to review the updated document. As with tracking learning requirements, digital signatures can be used to confirm that a document has been learned, and HR and management can easily see who has or has not reviewed the document.

For documents and policies that need to be reviewed and updated annually for example, HR will receive a notification that a policy is due for review. Once the policy has been updated, it supersedes the previous version, and the system can notify employees that there is an updated policy that they must read.

Conclusion

Metadata-driven EIM solutions can be leveraged to improve the management of HR and employee related documents and information by making that information easier to find, secure and share. These systems can streamline traditionally manual and cumbersome HR processes, thus reducing the risk of human error and ensuring information remains secure, while also allowing the HR team to work more efficiently. This enables HR to focus on managing their company's most important asset - its people.



To learn more about how metadata can help with automating and unifying HR related information and processes, visit www.m-files.com.

About M-Files®

M-Files enterprise information management (EIM) solutions eliminate information silos and provide quick and easy access to the right content from any core business system and device. M-Files achieves higher levels of user adoption resulting in faster ROI with a uniquely intuitive approach to EIM and enterprise content management (ECM) that is based on managing information by “what” it is versus “where” it's stored. With flexible on-premises, cloud and hybrid deployment options, M-Files places the power of EIM in the hands of the business user and reduces demands on IT by enabling those closest to the business need to access and control content based on their requirements. Thousands of organisations in over 100 countries use the M-Files EIM system as a single platform for managing front office and back office business operations, which improves productivity and quality while ensuring compliance with industry regulations and standards, including companies such as SAS, Elekta and NBC Universal. For more information visit www.m-files.com or call +44 (0)3300 889569.

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