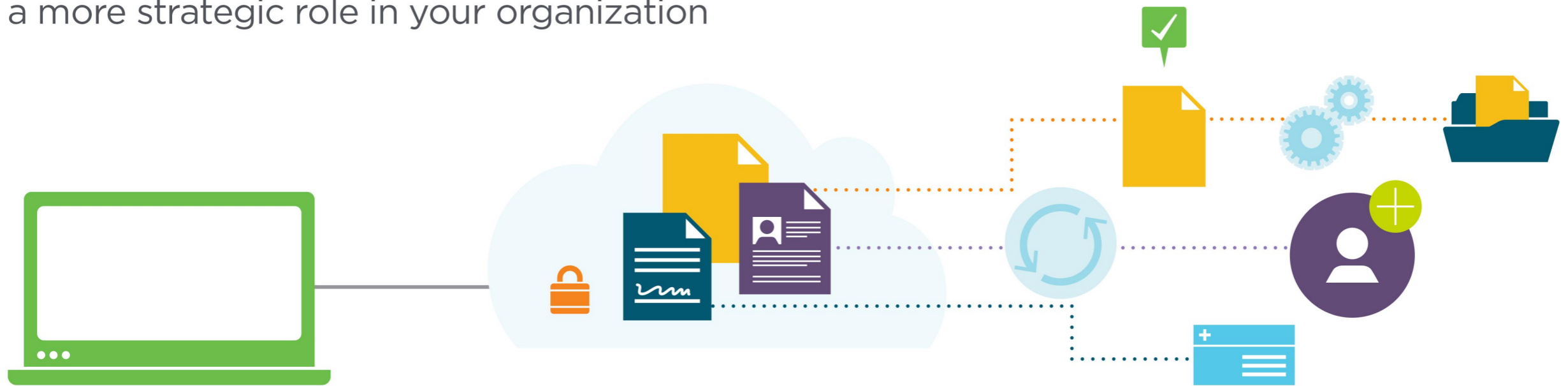# 7 REASONS YOUR HR DEPARTMENT NEEDS A CONTENT SERVICES PLATFORM

Eliminate headaches, ease security and take a more strategic role in your organization

WHAT'S INSIDE:

(click to jump to a chapter)

Why HR? Why now?

Content services solutions for human resources (HR) departments are growing in popularity. Why? Whether prepping for an upcoming audit or conducting an investigation into an employee issue, security, compliance and cost-related issues are everywhere — especially when processes are manual, paper-based and inconsistent.

Many in HR have realized content management isn't just a nice-to-have. With social movements shining a spotlight on workplace misconduct and data privacy regulations that can impose major fines (up to $2 million for GDPR non-compliance), a good content services platform is now a necessity.

Notice the word choice — *good*. Not all content services platforms are created equal. In this ebook, we'll guide you through seven of the most compelling reasons to make HR your next content services project.

Meet Sarah, our HR expert

Put simply, *Sarah loves HR*. She spent more than five years on Hyland's own HR team gaining first-hand experience with recruiting, retention, employee engagement and more. She knows how challenging the HR field can be in today's complex business landscape. Now, as a Sales Engineer, Sarah gets to talk with HR departments every day about the issues they face. She uses her deep knowledge of HR and content services platforms to help improve the efficiency and security of their processes.

Based on her experience, Sarah has identified seven reasons why content services should be a top priority for HR departments. But first, let's work on defining content services.

What is a content services platform?

SARAH'S TAKE:

One of the first questions I often get from HR leaders is, *'If I have an HRIS system, why do I need to use a content services platform?'*

A content services platform is capable of aggregating content across multiple repositories to connect disparate applications. It represents a shift from self-contained enterprise content management (ECM) systems to open services. Gartner, a leading IT research and advisory company, defines content services this way:

Content services are a set of services and microservices, embodied either as an integrated product suite or as separate applications that share common APIs and repositories, to exploit diverse content types and to serve multiple constituencies and numerous use cases across an organization.

HRIS vs. Content Services

An HRIS and a content services platform are two different, but complementary systems. Adding content services extends the value of your HRIS system by supporting the employee data in your HRIS with a powerful combination of document management and process automation.

HRIS

- The system of record where all the data is stored for an employee

- Sometimes the HRIS system will also manage some processes

Content services platform

- Manages all of the unstructured content for employees (e.g., resumes, tax forms, employment contracts, offer letters, etc.)

- Automates processes like employee onboarding and offboarding, file retention and records management, policies and procedures administration, employee status changes and more

Some HRIS systems will claim to offer document management

If that's the case, HR departments should ask:

- *Will it manage all documents? Or just documents associated with the limited processes the HRIS manages?*

- *Will this system be the one source of truth for the employee file?*

If the answer is no, then HR staff will have to visit multiple places (physical files or other systems) to get all of the records associated with an employee. HRIS systems also can't handle records retention requirements, even for the limited number of documents that they manage.

For these reasons and more, HR leaders should be evaluating content services solutions as their next IT priority.

1

Paper employee files are dragging you down

Create one source of truth for the employee file

SARAH'S TAKE:

When talking with HR leaders about what is really causing them pain, the first question I ask is always, *'Where are your employee files?'* The most common response is, 'well, we have them in a paper file room.' Sometimes the files take up more than one room. Trying to find one piece of paper in one or more rooms filled with paper is time consuming. Taking the time to search and then finding out it's been on your coworker's desk for the last two days is beyond frustrating.

Storing your HR documentation and employee files on paper can cause many problems. From expanding storage space needs, to the risk of lost documents or duplicate filing — the costs of poorly optimized real estate and lost efficiency add up.

But it's not just the files in the file room that are the trouble. Typically, HR is also saving documents in emails or on shared drives that not all staff can access. As a result, HR doesn't have the complete view of the employee file that they need to efficiently make decisions and respond to inquiries or requests.

What can a *good* content services platform do?

With a good content services platform, you can digitize your entire library of employee files to become a truly paperless HR department. Leveraging a clear and simple electronic folder structure, HR staff can view all of the files in an employee's folder as well as identify missing documents.

A good content services system also:

Mimics your existing HR folder structure

Turning a paper file into an electronic file that looks exactly the same with the same tabbed colors or folder covers makes using the new solution structure more comfortable for HR employees. A good solution is capable of keeping employee documents separate from the employee file for compliance purposes.

Ensures that documents are secure and auto-foldered

Making employee documents easy to view in the system is great. But it also needs to be easy to get them into the system in the first place. A good solution can pull in documents from other systems, but it will also allow you to easily add files on an ad-hoc basis.

Helps you identify missing documents

This is a huge benefit for HR departments. In a paper-based world, workers can see the documents that are in the folder, but they can't see if there are documents missing. A content services system gives users visibility into what documents are missing for an individual or group of employees.

2

Security is a concern

Protect sensitive HR documents

SARAH'S TAKE:

One of the things I hear most often about paper files is that *there just isn't a good way to know who's touching those documents and what they're doing with them.* HR might have documents locked up in a file room, but what if someone forgets to lock the door? Or what if someone starts accessing documents that they shouldn't? They have no record.

A good content services platform provides HR departments with visibility into the full history of every touch, view, and edit to employee files. And it provides a way to secure them – usually with role-based access.

Example:
Manager A has 10 employees
Manager B has 20 employees

Is it possible to ensure that Manager A only has access to files for those 10 employees that work for him or her? Same for Manager B?

Absolutely.

What can a *good* content services platform do?

It can get very granular with user access – down to the metadata level – to ensure that only users with the correct rights and privileges have access to those documents. User access is based on the principle of least privilege, which says that users should only have the minimum access required to do their jobs every day.

A good content services platform provides you with a complete audit trail for every single document, ensuring that you can see who touched the document, what they did with it, and the date and time they accessed it.

What about encryption? Any good content services platform should provide you with encryption when data is at rest (not actively being used), in transit (moving between servers within the database), and in use (being accesses by authorized users).

3

Compliance keeps you up at night

Minimize risk with records management and policies and procedures

SARAH SAYS:

One of the earliest compliance questions I ask is, *'What does your retention policy look like today?'* I'll see customers shifting around, smiling and nervously laughing. And then they say 'we keep everything forever.'

What if...

An auditor asks you to present every I-9 you have. Your HR department is then required to present every single I-9 that you've ever had for every employee in the company.

In the complex world of human resources regulations, how long you hang onto documents matters. Audits are stressful, and the associated fines can be hefty — especially if they're charged per document.

What can a *good* content services platform do?

The complex time and event-based retention policies that HR departments must maintain for different employee files require a better-than-average solution to manage. A good content services solution removes the burden of records management from HR staff to save time and minimize compliance risk.

When a document enters the system, it will automatically identify and assign a record type, apply the appropriate retention policies, and purge the documents when required. A good content services solution offers:

Time/event based retention

The ability to place holds on records

Destruction certificates

4

Compliance keeps you up at night

Minimize risk with records management and policies and procedures

SARAH SAYS:

If you have paper-based files today, and an auditor comes onsite, you're going to get a lot of steps on your fitness tracker walking back and forth to your file room.

If reaching your daily steps goal is your number one priority, then don't worry about the expensive auditor, who charges by the hour. And forget about the stress that a short-notice auditor request can create if all of your documents are stored on paper.

But if your HR department is interested in getting time back, lowering stress and raising confidence going into an audit, content services should be on your radar.

What can a *good* content services platform do?

It should allow an HR department to:

Set limited, secure, time-based access for an auditor

Eliminate administrative burden

Reduce or eliminate pre-audit prep

If I'm going to give an auditor access to my system, can they see *everything*?
No. With a content services solution, HR can limit the auditor's access to only the documents they've requested. If the auditor is open to performing the audit remotely, you can also provide limited, time-based remote access.

5

Compliance keeps you up at night

Minimize risk with records management and policies and procedures

SARAH SAYS:

One of the main reasons to move forward with a content services project in HR is because *it can act as the glue that keeps other systems in place.*

Content Services

HRIS and content services systems serve different HR needs, but it's still incredibly important that they work together. Changes that take place in the HRIS system affect documents that are part of the employee file, and vice versa. As a best practice, the HRIS and content services system should pass information to one another.

The HRIS most likely isn't the only system an HR department has implemented. Usually there are other systems, like performance management, payroll or applicant tracking applications. And when processes are manual and paper-based, switching between all of these systems to ensure documents and data are in all the right places is time-consuming and tedious.

What can a *good* content services platform do?

It should be able to assist with connecting your HR systems whenever necessary. Let's consider these examples:

- A company has an applicant tracking system that manages prospect applications, interviews and hiring. When a new hire is made, the documents from the applicant tracking system need to become a part of the employee file.

- Data in a company's HRIS system changes when an employee who was active is terminated. The employee file in the content service systems needs to be updated with that information to ensure all systems are on the same page.

A good content services platform will seamlessly manage the transfer of information that takes place in both of these cases, removing the burden from HR.

6

# HR has complex processes other systems can't handle

Help avoid IT sprawl and fill in the gaps with existing systems

SARAH SAYS:

I see a lot of HR organizations gobbling up niche solutions to put bandages on individual process issues. While helpful in the short run, it creates headaches for the IT department who now has to manage a sprawling HR tech landscape.

But even with multiple HR systems in place, paper-based, manual processes persist. Simply put, HR has a lot of complex processes that most HR technologies are not built to handle. These are the gaps that keep your file cabinets in business and your workers buried in non-strategic tasks.

Bridging these gaps with a content services solution helps disparate HR systems communicate and builds true end-to-end automation for your HR processes.
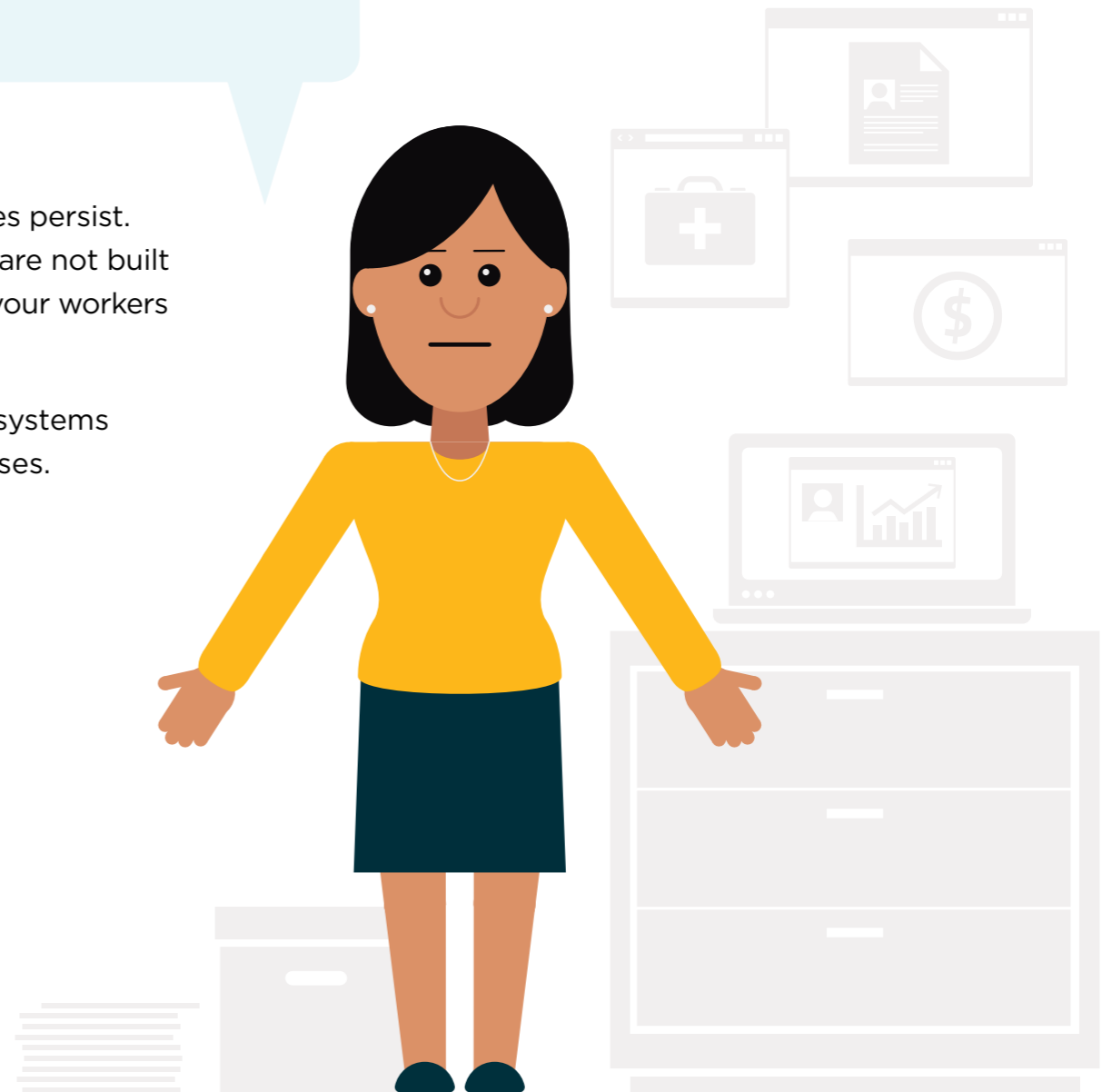
Case management:
A 360-degree view of employee relations

HR often runs into complex processes that include more than just creating a document and routing it. Think of processes like employee onboarding and offboarding, handling a harassment claim or investigating a safety incident.

Processes like these involve multiple stakeholders who need to take specific actions and contribute information, which may also need tracked for reporting or compliance purposes. With a case management approach, you can store and track all the information and activity surrounding these kinds of HR processes from one screen.

"I think case management is the way of the future for HR. We are seeing a real increase in case management, because it has that ability to provide HR with a 360-degree view into what's going on with a process."

Employee relations is a perfect example of the opportunity to use case management in human resources. Consider the following scenario:

A harassment incident is reported to HR

HR launches an investigation

HR collects supporting documentation and adds it to the record

HR takes notes and manages checklists of required follow up steps

From the initial incident report to all of the content and data that surrounds the issue, the amount of sensitive information HR has to manage is overwhelming. And the risks of mismanagement and inconsistency in processes can result in lawsuits and damage to a company's reputation.

Taking a case management approach to employee relations with a content services solution provides HR with a single view of all information surrounding an employee issue or incident, so no information gets lost.

7

An HR solution will make a huge impact on your organization

SARAH SAYS:

The more paper, processes and systems seem to increase — the more the search for comprehensive systems to manage content, processes and cases intensifies.

One of the most compelling reasons to choose HR for your next content management project is that the issues we've covered are not going away. But with the right tools, your organization can take the heavy lifting out of managing documents and processes, while gaining access to the reporting capabilities it needs to be more visible to leadership.

Don't know where to start? Follow this HR content services action plan

1. First, sit down and take stock

- Where are your employee files?
- Do you have a retention policy?
- What HR systems are in place?

2. Identify the scope of the project and be sure to start small

- Get some help! Talk with Hyland experts about best practices — we can help you understand the benefits, as well as the risks.

3. Focus on a phased approach:

- Get rid of the paper
- Automate retention and focus on integration
- Tackle processes to reduce administrative burden

Safe and secure on site or in the cloud

More and more organizations are choosing to deploy their technology solutions in the cloud to alleviate the burden of in-house maintenance and storage. Content services from Hyland can be deployed on-premises or safely hosted in the Hyland Cloud.

Privately managed since 2004, the Hyland Cloud uses individual encryption to ensure data is fully secured and never commingled. Reliable, accredited data centers are managed 24/7/365 by a team of cloud experts to provide the highest levels of availability and uptime.

More than 700 organizations around the world trust Hyland with the security of their data and documents. From small organizations needing less than 1 gigabyte of storage to large enterprises requiring more than 100 terabytes, the Hyland Cloud easily scales to support any organization's cloud-first IT strategy.

Learn more at **keymarkinc.com/onbase-software/hyland-cloud/**

Content Services: A natural choice for human resources

Focus on people, not problems

From ridding your HR department of paper files, to ensuring the compliance and security of information and processes, a content services platform can be an invaluable technological resource to an organization.

But ultimately, and most importantly, it's one that lets you focus on the humans that are your organization's most valuable resources. Hyland's content services platform builds confidence in compliance, security and efficiency, letting people, not problems, take center stage. And when people are empowered, human resources can claim its place as the dynamic, strategic business partner it's meant to be.

Is your HR department ready to tap into a market-leading content management resource like OnBase?

Visit **keymarkinc.com/human-resources/** for more information.

About KeyMark

KeyMark is a leading provider of intelligent automation solutions focused on enabling better business outcomes through capture (OCR), workflow (ECM), case management (DCM) and robotic process automation (RPA) solutions, artificial intelligence, and machine learning technology. KeyMark helps clients leverage technology, such as artificial intelligence and machine learning, to maximize productivity and decrease manual labor in industries such as: financial services, healthcare, insurance, manufacturing, distribution, utilities, logistics and the public sector.

Together, KeyMark, Blue Prism, OnBase by Hyland and Kofax help organizations to scale effectively and achieve operational agility by deploying a digital workforce that maximizes productivity and minimizes manual work. As a value-added reseller of today's leading intelligent automation solutions, KeyMark is one of a select few organizations worldwide to represent such a comprehensive list of automation capabilities with years of proven experience and award-winning Extended Support. Additionally, KeyMark is the creator of Forms InMotion, an innovative software-as-a-service solution for forms automation.

For more information, call 864-343-0500 or send an email to sales@keymarkinc.com.