THE ULTIMATE GUIDE TO

HR AUTOMATION

WHAT'S INSIDE? The benefits of automating HR tasks   5 steps to automating HR   Top technology trends for HR   **PLUS** much, much more!
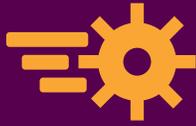
EVERYTHING YOU NEED TO KNOW
TO BUILD THE CASE FOR HUMAN RESOURCES AUTOMATION

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WHAT'S INSIDE

Introduction

Human Resources (HR) doesn't just exist to keep the paychecks moving—HR can play a valuable, strategic role in any office. Organizations recruit and retain talented individuals to stay ahead of the competition, and they need competent and communicative HR professionals to do so. However, a recent report from the Hackett Group found that HR budgets and staffing are shrinking in 2014, with **staff decreasing at more than twice the rate of the budget.**

Due to these dwindling resources, HR professionals are seeking ways to do more with less. Strategically investing in technology is one way to achieve this goal. In fact, the Hackett Group found that 89% of respondents listed "investing in technology or automation" as a top strategy for reinventing service delivery in 2014. Time- and resource-consuming manual processes can no longer support HR departments—or the organizations that depend on them for talent.

Manual HR processes increase chances for data errors, employee dissatisfaction and non-compliance. Manually processing payroll, employee records and tax forms takes time away from the more strategic goals of talent recruitment and employee engagement. On the other hand, an automated, digital HR system reduces the administrative burden on HR employees and increases organization-wide self-sufficiency through instant access to information.

Let's explore the ways automation helps HR build a high-functioning infrastructure that employees, job applicants and executives can appreciate.

What Is HR Automation?

Human Resources, along with many other departments, depends on document-driven processes to get work done. For example, employment contracts must be read and signed by new employees during the onboarding process. In a paper-based office, this process requires someone to make sure the contract is accurately prepared, printed, signed by the employee, received by HR and properly filed. Although the employee contract is an essential part of onboarding a new employee, spending hours of valuable time to complete this process on paper is not.

Enterprise content management (ECM) software reduces the time it takes to complete tasks—without sacrificing quality of work. Organizations use ECM to capture, store, secure and access information by:

▶ Importing documents into a digital repository, whether they originate on paper or in a digital format.

▶ Organizing them in the repository, where authorized employees can search for, retrieve and edit documents.

▶ Keeping files in a standard format (such as TIFF) that can be easily shared across devices.

▶ Archiving records as non-editable files and retained according to a compliant records retention schedule.

▶ Making information simpler to locate during an audit or records request.

Business process automation (BPA) facilitates these document-based processes and should be an integral part of your ECM solution. BPA handles many of the administrative tasks that, though critical, slow down productivity when performed manually. Such tasks include filing documents, creating new folders and transferring documents between employees. BPA software also eliminates the need for paper-specific tasks like making photocopies and gathering handwritten signatures.

For many organizations, BPA is more than a convenience—it's become a primary focus. Towers Watson, an HR consulting firm, performs an annual survey of global organizations' HR goals and practices. In 2013, the survey observed that "talent management" was replaced by "reengineering business processes" as a top priority for HR. The Hackett Group's finding that 89% of participating organizations intend to invest in technology or automation in 2014 confirms this shift in focus.

An ECM solution with a strong BPA component helps HR departments improve quantitative metrics (such as the time required to onboard an employee), minimize risk and play a more strategic role in the organization.

"From a compliance standpoint, having a core HR system for securing data is vital for privacy and employee data security. From a workflow perspective, automating payroll reduces the time required by a manual process each pay period and frees up HR staff to focus on more strategic elements of HR, and in some cases, it enables the organization to reduce costs by eliminating corresponding roles."

—Aberdeen Study: The Future of Core HR
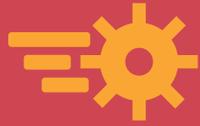
Which HR Tasks Can Be Automated?

Automation can greatly reduce the time it takes for HR personnel to perform routine tasks. By sending instant reminder emails for benefits enrollment, automatically generating new folders for recently hired employees, or even notifying health and safety monitors when an employee moves to a new floor, automation technology allows HR professionals to contribute their time to more valuable duties.

Here are some core HR functions that can be improved with automation:

Timesheets

Send instant, regular reminder emails for employees to review their timesheets.

Tax forms

Facilitate the distribution of W2s and other tax documents with employee email reminders.

Health and safety

Send update emails to floor monitors when an employee leaves the organization or moves to a new floor.

Recruitment

Automatically store applications submitted online and assign them to a recruiter for review.

Records management

Retain employee records according to government regulations.

Benefits

Track when employees become eligible for benefits enrollment.

Onboarding

Send confidentiality agreements, waivers and other forms to new hires and, once completed, securely store them.

Evaluations

Rate employee performance in an electronic form that automatically routes to supervisors for review.

When's the Right Time to Automate HR?

Keeping pace with technological advances is a lofty goal, and most organizations don't have the budget for frequent upgrades. Before you decide to automate HR, it's important to weigh all the factors involved, such as the predicted growth of the company and the level of satisfaction (or dissatisfaction) with the current HR system. Here are seven ways to recognize when the need for HR automation has become critical.

1   Functions Have Become Subpar

Perhaps the most glaring example of an underperforming HR process is the distribution of delayed and error-ridden paychecks. Employee dissatisfaction is almost guaranteed if paychecks fail to arrive on time, or if further delays occur because of miscalculations. If your payroll process involves manual calculations of earnings and deductions, updating spreadsheets and scanning paper documents, the time has come for automation.

Do you or your HR colleagues also get blamed for slow onboarding, or distributing tax forms at the last minute? Take a look at the most fundamental responsibilities of your HR department and see if any of them fall short.

2   Workforce Has Outgrown HR Capabilities

According to a 2012 survey from the Society for Human Resource Management, 69% of HR professionals expect their organization to have a larger workforce in 10 years. Periods of increased onboarding can swamp a manual HR department. Even if a manual HR department manages to keep up with the demand for new employees, all that time spent on paperwork means less time for thoughtful recruitment. In this case, the organization will grow in quantity, not quality.

The more HR tasks that are automated, the more time HR professionals can devote to attracting and sustaining a talented workforce. If you've noticed a lack of recruitment efforts coupled with high turnover rates, an overworked HR department could be the cause.

3   Audits Have Become a Nightmare

An HR audit can reveal two major flaws of a manual, paper-based environment: HR records and procedures fail to meet regulations and the audit process itself disrupts work and hinders productivity. Every hour spent finding and compiling physical documents costs the organization money—and then there are the non-compliance penalties, which can reach up to $10,000 for poor record keeping.

If HR audits at your organization result in fines or take weeks to conduct, it's probably time to go digital and automate HR.

4 Operational Costs Have Become Unsustainable

Paper files result in storage, printing and mailing expenses that only grow over time. Destroying old, unneeded records seems like an easy way to mitigate the costs of paper, but without an organized system for retaining records, organizations have no way of knowing when a record can be destroyed. In the end, it's easiest to keep paper records indefinitely—but it's certainly not cost-efficient.

If paper and storage expenses are eating into your HR department's budget, switching to an automated system will help you save on these operational expenses.

5 HR Staffing and/or Budget Has Decreased

A 2014 report from the Hackett Group predicted an alarming trend for HR departments: although demand for HR services remains high, HR budgets and staffing are shrinking—with staff decreasing at more than twice the rate of the budget. If this trend is making its way into your HR department, then the opportunity to improve HR service delivery and productivity has never been more urgent.

Because an automated HR system requires less human involvement than a manual one, HR departments can operate efficiently, even with reduced staff. Additionally, HR professionals can keep track of documents more easily in a digital format, helping them maintain better compliance despite having limited resources.

6 Organization Is Expanding Geographically

A geographically dispersed organization needs to manage and collect data in order to make intelligent business decisions. HR departments should be able to share data, such as employee competencies and local labor-market trends, with the organization. However, manual HR departments rely too much on data entry and administrative bottlenecks to efficiently share information with other offices.

If your organization has expanded or is planning a major geographical expansion, manual, paper-based processes will do little to support its growing needs. Automation benefits the organization that demands insight into its satellite offices, as well as the HR departments that must provide that insight.

7 Organization Is Merging with or Acquiring New Offices

When previously independent employee groups need to be combined into one system, the drawbacks of a manual HR department become abundantly clear. Employees must put work on hold just to catalogue databases and transcribe information while decision makers must determine how to consolidate everything without losing crucial documents. A combination of two digital repositories—even if they don't exist in the same software application—can still be accomplished faster and with less error than transferring data from paper to software.

An organization that hasn't automated HR before a merger or acquisition should consider doing so as part of the restructuring phase. As the newly formed organization assesses its workforce, HR can share valuable information with an automated system, or hinder strategic planning with a manual one.

What Are the Benefits of HR Automation?

Automation technology works to enhance the human element of HR by freeing employees from tedious tasks.

Automation technology is multi-functional and can lead to many different benefits. Some benefits include:

Higher productivity due to faster processing times and information sharing.

Lower employee turnover rates due to higher satisfaction with timeliness and accuracy.

Reduced storage, printing and courier costs associated with paper-based work environments.

Reduced risk of non-compliance penalties.

Fewer data entry errors and lost or misplaced files associated with manual processes.

Better support of organizational growth through efficient hiring and leaner operational costs.

More time to analyze HR data to make intelligent business decisions.

Better collaboration with executives to recruit, train and retain top talent.
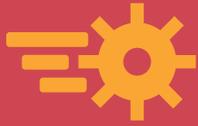
HR Automation in Action

The Muscogee (Creek) Nation Department of Health employs more than 1,000 people in multiple offices spread out over a wide area. This means that a large number of documents and files are processed and accessed regularly. Here is how the department has made almost all HR functions paperless with ECM.

Human Resources Onboarding

Whenever a manager needs to hire an additional employee, he must submit a staffing request through an electronic staffing request form. This form is automatically saved in the organization's Laserfiche ECM system and routed through three different levels of approval (HR Director, Chief Operating Officer and Director of Health) before the position is opened. Here is what this workflow looks like:
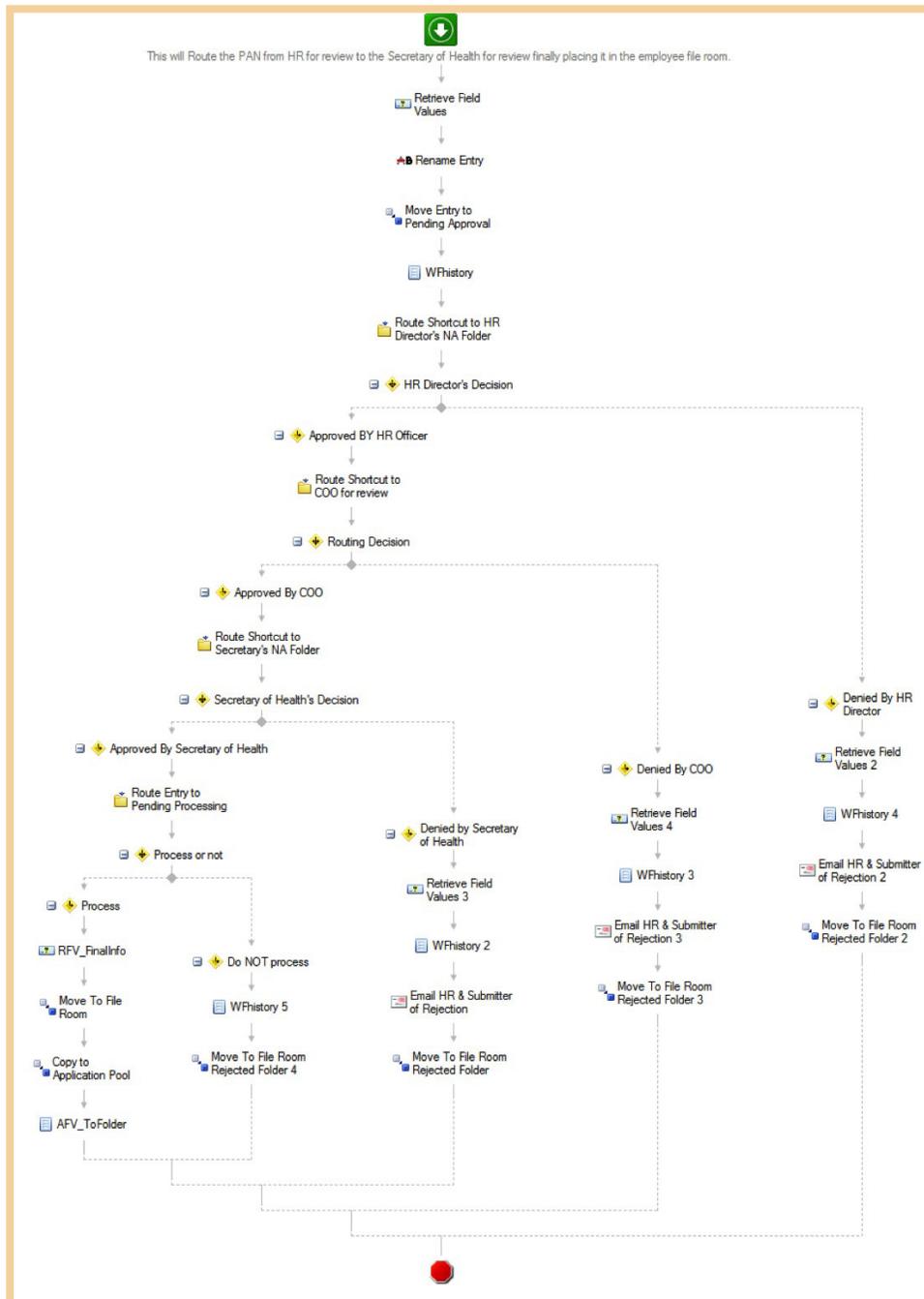
Once the position is approved, it is posted online. Applicants can apply by filling out an electronic job application form.
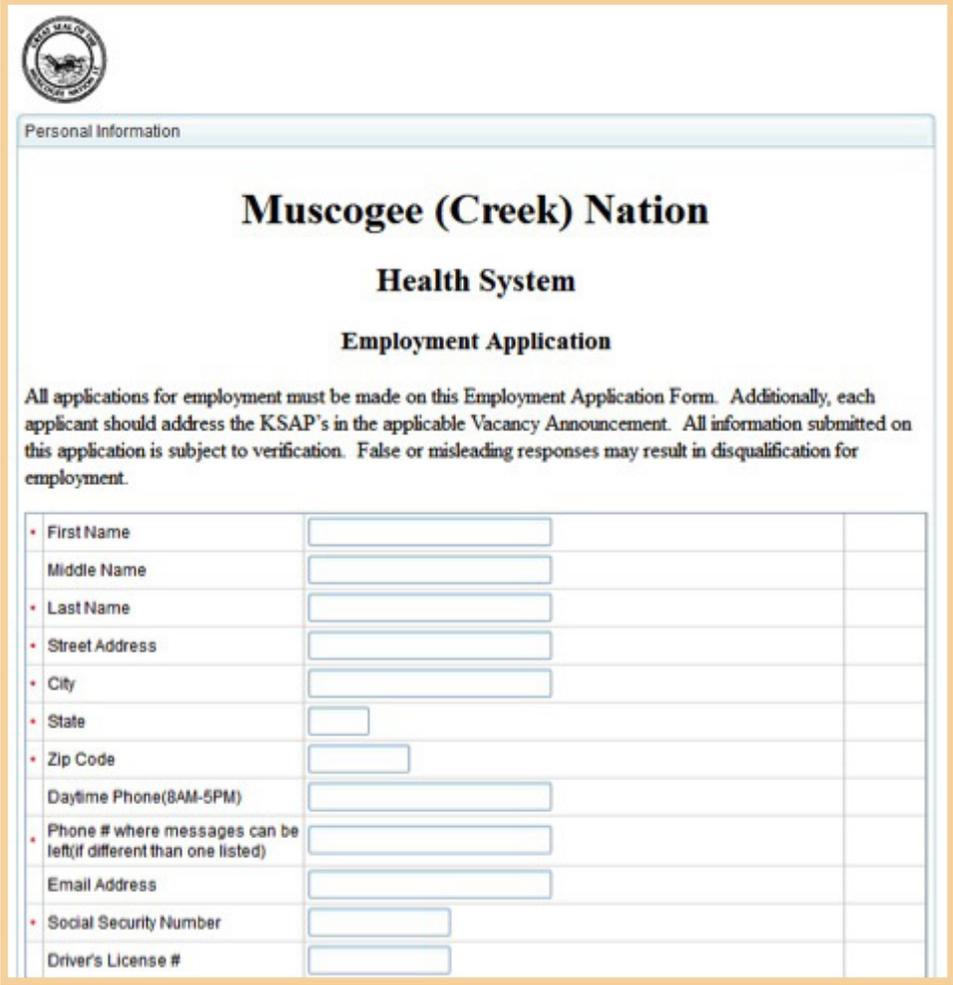
Muscogee (Creek) Nation

Health System

Employment Application

All applications for employment must be made on this Employment Application Form. Additionally, each applicant should address the KSAP's in the applicable Vacancy Announcement. All information submitted on this application is subject to verification. False or misleading responses may result in disqualification for employment.

	Field	
•	First Name	
	Middle Name	
•	Last Name	
•	Street Address	
•	City	
•	State	
•	Zip Code	
	Daytime Phone(8AM-5PM)	
•	Phone # where messages can be left(if different than one listed)	
	Email Address	
•	Social Security Number	
	Driver's License #	

Once the form is submitted, it is saved in the repository, where a template is applied and automatically populated. Here is what this template looks like:

The system then routes the application to the Application Pool folder.
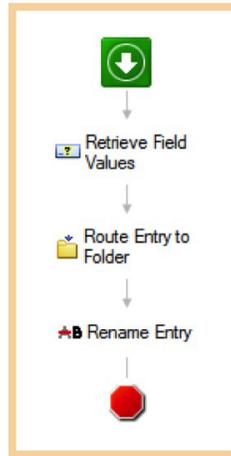
The hiring supervisor looks through the candidates and schedules interviews. After the interviews, the hiring supervisor either recommends hiring the candidate or rejects the candidate. He signifies his decision by updating the value of a metadata field.

This action triggers the ECM system to route the application through the various approvers. If a candidate is selected for the position, an email is generated and sent to all the other candidates notifying them that a selection has been made.

Here is what the folder structure looks like.
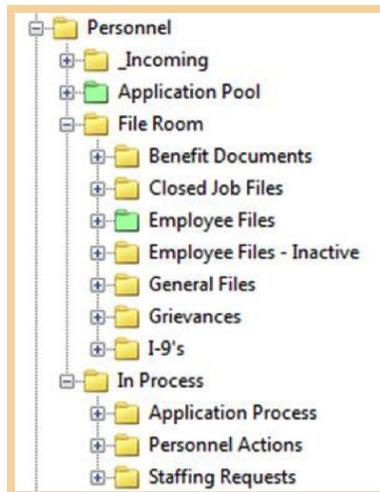
Travel Request Process

Another of the many processes that the HR department has automated is the travel request process. This process works as follows:

▸ An employee submits a travel request by filling out an electronic form, which is automatically saved in the ECM system.

▸ The system picks up the form and routes it to the Pending Approval folder, where it waits until it is reviewed and approved by multiple parties. Here is what this workflow looks like:
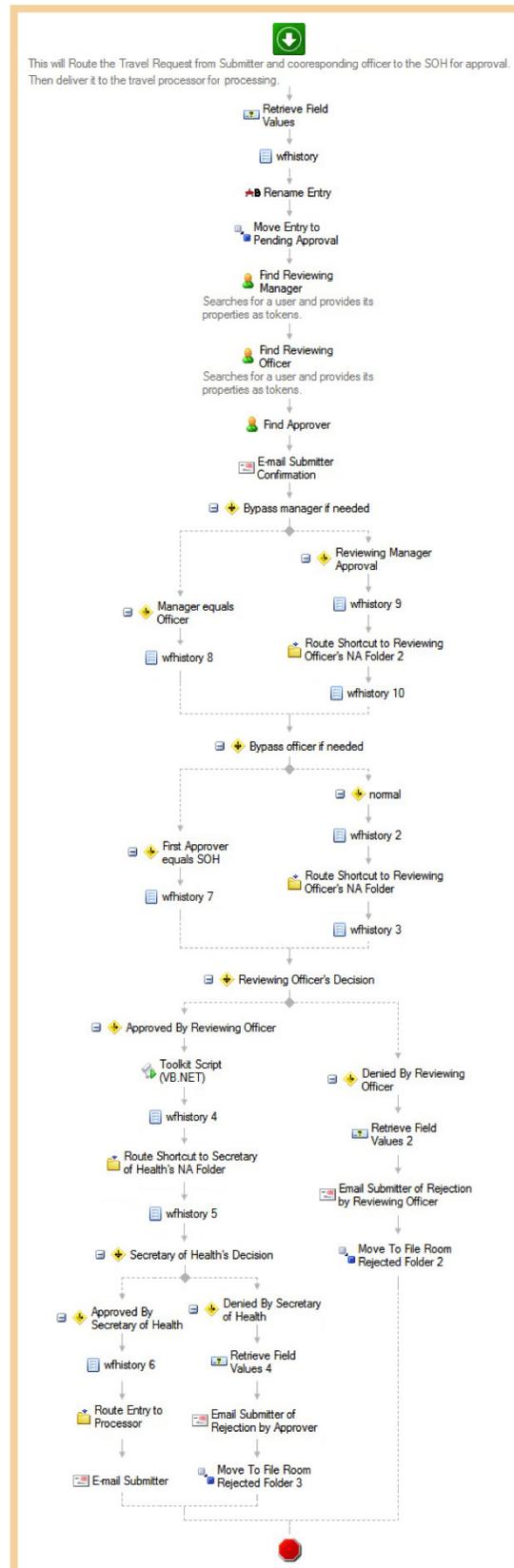
▶ Once the travel request is approved, it moves to the Pending Processing folder, where it waits to be processed by the travel coordinator. Once processed, it is moved to the Pending Booking folder, where it waits for the hotel and flight information.

▶ Once the flight and hotel have been booked, the travel coordinator changes the value of a field, which triggers the ECM system to move the form into the Pending Advance folder.

▶ Once a travel advance is delivered, the travel request is moved to the Pending Departure folder, where it stays until the employee's departure date. The system regularly and automatically checks the departure date against the current date. On the departure date, the travel request is routed to the Currently Traveling folder. Here is what this workflow looks like:
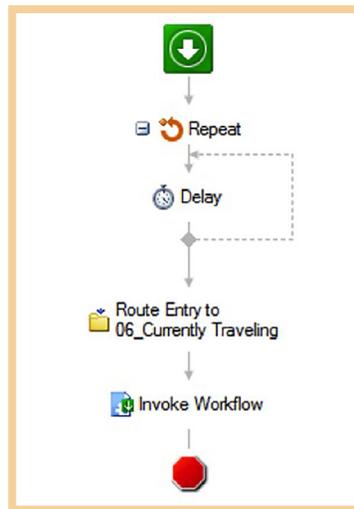
▸ Another workflow monitors the Currently Traveling folder. Once it finds that the travel return date has passed, it moves the travel request to the Awaiting Expense Report folder. Here is what this workflow looks like:
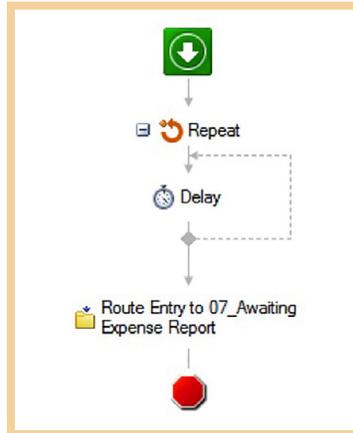
▸ When the employee returns from his travel, he fills out an expense report online. Incoming expense reports are moved to the Incoming Expense Reports\Pending Processing folder. The system also finds the corresponding travel request and creates a link between the two documents.

▸ Once the expense report is processed, it is moved to the Expense Reports\Awaiting Approval folder, where it awaits approval for reimbursement.

▸ Finally, the expense report is moved into the Pending Reconciliation folder. After it is reconciled, it is moved to the Complete folder.

▸ Here is what the folder structure looks like:
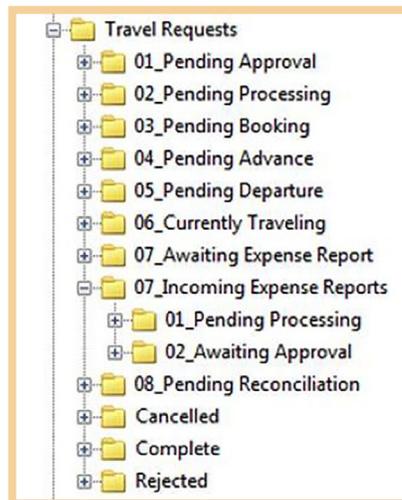
Benefits of Automation

Implementing ECM at the Muscogee (Creek) Nation Department of Health has resulted in the following benefits:

▶ If everyone is at their computer when the process kicks off, documents are approved in as little as five minutes. In the past, it would take at least a day just to send the document to the main office from another site. The whole approval process would take a week or more—even if everyone was in the office.

▶ Managers can log into the ECM system on any given day and quickly see how many employees are out travelling, where they are and when they'll be back.

▶ Previously, if someone needed to look at an employee file, he would either have to come to the main office in person or have it delivered. Deliveries by courier would take up to three days. Today, authorized employees can view that information instantaneously.
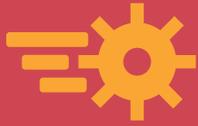
5 Steps to Automating HR

HR automation will remain a pipedream if it lacks a solid plan of execution. Furthermore, that plan needs to consider the pushback that will likely occur, since resistance to change is a natural human tendency.

Business process automation simplifies and expedites the capture, processing, review and approval of HR documents. To ensure stakeholder, department leader and end user adoption of ECM, the HR department should incorporate each of these five steps into its change management strategy.

Here are five essential steps that will encourage organization-wide adoption of an automated HR department.

1 Establish Ownership of the Project

Identifying a project owner and project champion is the first critical step toward successful HR automation. While the project owner handles daily operations, the project champion shares the vision of automation with stakeholders and gathers support.

Both project leaders should be able to:

▸ Effectively communicate with all involved departments, including IT.

▸ Understand the needs of end users who will be using the new system daily.

▸ Express the value of automation to different departments, employees and stakeholders.

▸ Identify early advocates of automation and enlist their help in gaining support.

Along with these criteria, the project leaders must understand that the biggest challenge to implementing ECM software and automating processes is user resistance. Jennett Mays, Communications Coordinator at the Township of Springwater, Canada, emphasizes the importance of approaching ECM as a strategic business opportunity with clearly expressed benefits. "We can train people, we can give them the software, but they need to be on board with using it or you're going to have more problems," says Mays.

By addressing user concerns before diving into the technical details of the project, Mays has overseen rapid adoption of ECM across the municipality.

2 Secure Buy-In

The project champion should obtain support from all involved departments, not just the HR department, to realize the full time- and cost-savings of automation. For example, HR can design a standard, electronic travel request form that employees can use to speed up the approval process—but if only a fraction of departments use this form, the benefits will be minimal.

Bill McIntyre, Division Manager of Enterprise IT, took a strategic approach to securing buy-in across Loudoun County, VA. "We targeted departments that were very paper-based and that would see the benefits of digitizing the paper right away," says McIntyre. With this approach, McIntyre was able to demonstrate immediate value of the system—and create ECM advocates along the way.

The HR automation project owner should seek out supporters in other departments who are frustrated by manual HR processes, such as department heads who must constantly walk travel request forms from one desk to another. These people will be most likely to advocate for change and spread support across other units in the organization.

3 Gather Requirements

Once department leaders are on board, the project owner should begin obtaining information about the HR process from end users, stakeholders and any other involved parties. In particular, identifying pain points helps the project owner separate the essential steps of the process from the non-essential ones.

The project owner should identify:

‣ How employees are trained on HR processes.

‣ How employees actually perform their HR-related tasks.

‣ Bottlenecks and redundancies in HR processes.

In fact, when the Town of Marana, AZ, begins any new technology project, it devotes the most time to gathering requirements. It does this by:

‣ Asking questions.

‣ Gathering sample documents.

‣ Identifying who does what when, where and why.

‣ Identifying and analyzing the current business process.

Other useful activities during this phase of an HR automation project include reviewing the structure of the HR department's folder directory and taking an inventory of all the software applications it uses.

4 Map the Process

During this phase, the project owner should work with IT to diagram HR processes. The project owner should also collaborate with end users to make sure essential components and departmental requirements are not lost.

A 2013 Towers Watson survey on HR service delivery and technology offers the following questions to consider when reviewing and reengineering a process:

▸ Does the work being performed make sense from a functional standpoint?

▸ Is work performed by the most capable individuals at each point in the process?

▸ Can any efficiencies be achieved by centralizing certain tasks and decisions?

▸ Do existing freedoms and restrictions make sense for both HR professionals and department managers?

Using these questions to guide decision-making, the project owner and IT department can map out an existing HR process, highlight manual or inefficient steps, then automate necessary steps and remove unnecessary ones.

Effective process mapping should also take into account whether certain tasks are better performed by an employee, an employee's manager or by HR. Reviewing a pay slip or updating contact information can be done quickly by an employee, as long as he has the tools and ability to do so. Allowing non-HR employees to be more self-sufficient can decrease cycle times and alleviate the heavy workloads of HR professionals.

5 Train Staff

Switching from a manual to an automated HR process requires a significant change in employee behavior, but thorough and engaging training can help facilitate the transition. Ramsey County, MN, successfully automated processes in several departments with the help of its extensive training program.

Ramsey County's training initiatives include:

▸ In-person, department-tailored training classes.

▸ Online instructional videos (featuring the cast of The Flintstones).

▸ User group meetings in which local ECM users exchange knowledge and best practices.

The entertaining quality of Ramsey County's training helped increase ECM adoption and awareness. Rochelle Waldoch, Compliance and Records Manager at Ramsey County, says, "Just because something is technical doesn't mean you can't have fun with it. If people are laughing, they're paying attention."
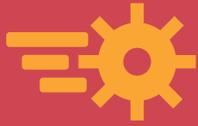
What's the Difference Between ERP and ECM?

Those researching ECM might be asking themselves, "Does ECM replace ERP, complement it or are they basically the same?" Whether or not your organization already has an ERP (enterprise resource planning) system, ECM is not an application that would replace ERP. Instead, these two applications should be integrated to help HR professionals accomplish daily tasks and gain a big picture view of the workforce.

An ERP system stores structured, transactional data. Some examples of this type of data include time sheets, performance evaluations and employee training. Calculations are made within an ERP to structure information and provide value to the user. Like ECM, an ERP application uses repositories to store information, can be used company-wide and serves a variety of departments, not just HR.

ECM, on the other hand, supports unstructured data, such as scanned documents, emails, images and more. An ECM system offers value to the HR department by storing records according to government regulations and improving information-sharing between authorized users.

If HR wishes to implement ECM within its own department, it can do so without replacing or interrupting an existing ERP system. These two applications can be integrated so that employees can link to ECM content from their ERP or vice versa. In other words, an HR professional searching for information related to a particular employee can open a document stored in ECM directly from her ERP program. This saves her from having to learn a new system, as ECM can often work entirely in the background.

Both ERP and ECM can be maintained independently, but the benefits of integrating these two systems help HR and the organization as a whole. In fact, a 2010 AIIM survey on the benefits of ERP and ECM found that 68% of respondents thought an ERP-ECM integration gave a better or much better ROI than other IT integration projects. Respondents also listed increased productivity, improved customer service and improved knowledge sharing as the top three benefits of integrating ERP with ECM.
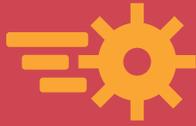
Top Technology Trends for HR

"HR organizations need to recognize that constant motion keeps them vital to business. For that reason, HR needs to embrace constant change. This means you can change the game by modifying your structure, rethinking traditional processes, and adopting new HR technologies and processes that work effectively together."
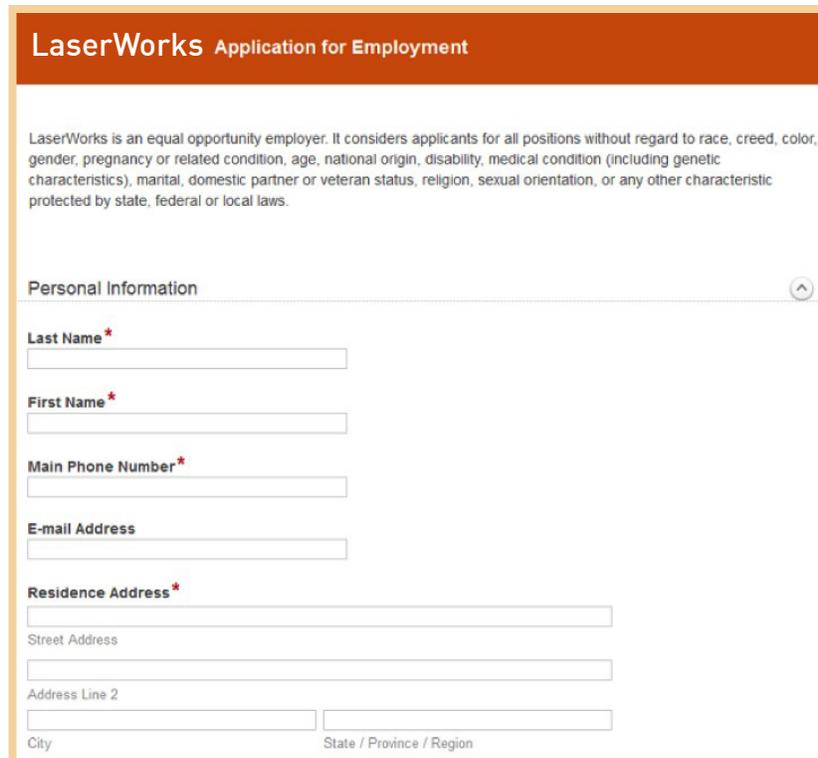
—2013 Towers Watson Survey: HR Service Delivery and Technology

HR professionals must handle their own unique challenges while also aligning with the shifting goals and priorities of the organization. Today's organizations face two dominant pressures: to be more "green" and to embrace mobile technology.

Three facets of ECM address these challenges: e-forms (electronic forms), electronic records management and mobile business processing. Let's see how HR can use these functions to keep business information off paper and online.

E-forms

Storing documents in a digital format helps reduce paper waste and environmental impact, but if documents continue to be generated on paper, the problem is not yet solved. To keep paper from entering the equation, HR can use standard e-forms to collect information.

An example of a job application e-form.

For example, job applicants can fill out a digital application that will be sent immediately to the HR repository, which would automatically kick off the employment application process. HR can even use e-forms internally for event RSVPs, sports team sign ups or other company initiatives. In any scenario, e-forms eliminate the need to convert information on paper to a digital format as the form is digital from the start.

Electronic Records Management

Continuing the idea of "start-to-finish" digital content, documents that originate in an electronic format can also be archived that way. When an employee leaves the organization, HR can save her employee records as non-editable files and assign a retention schedule ("Destroy 10 years from the date of departure," for example). The system will keep track of those records and send an alert when they can be destroyed

Setting a retention schedule in an ECM system.

By keeping active and inactive records in the same ECM system, HR professionals (and workers in any other department, for that matter) don't have to worry about migrating documents into a new application or, even worse, printing out documents for the records manager.

Mobile Business Processing

Web access to documents gives HR the ability to keep processes moving, even when employees are out of the office. A recruiter can review new applications on his smartphone while working a job fair, or an HR director can monitor the onboarding process of a new employee while traveling between satellite offices.
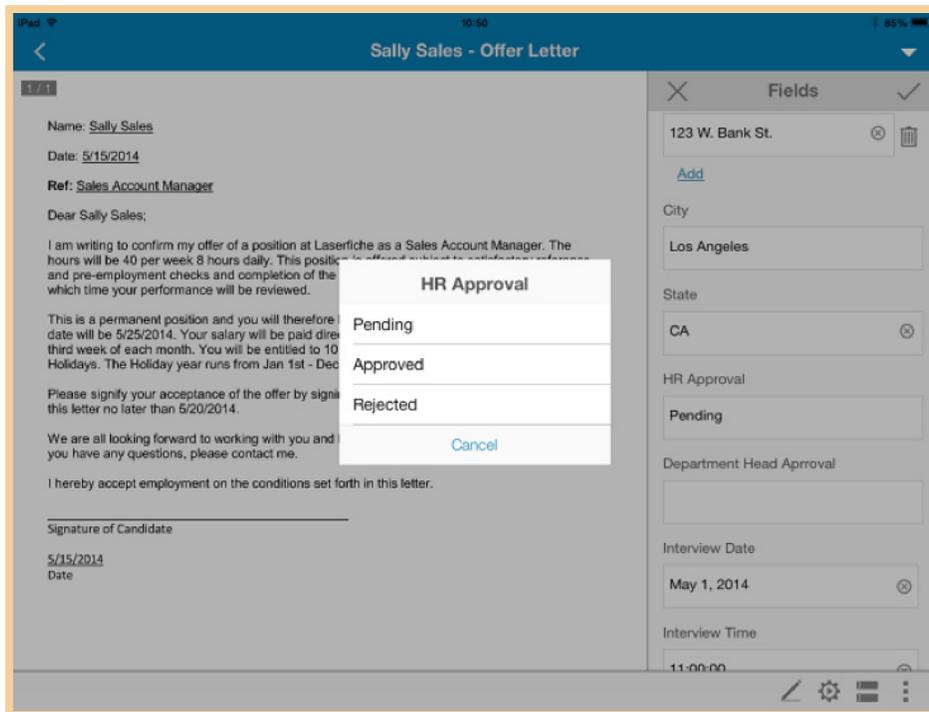
An offer letter viewed on a mobile ECM application.

For example, the HR director needs to review an offer letter before it gets sent to the candidate. Because job offers are time sensitive, the director must perform this task as soon as possible. Through an ECM mobile application, she can view the offer letter, instructions on how to approve or reject it and the document's history.

Electronic Records Management in Action

Personnel records demand a method of management that is secure, organized and easy to navigate. Here is how Franklin County, PA, and the City of Riverside, CA, use ECM to increase document security and build compliant repositories that are loved by employees and auditors alike.

Franklin County

John Aguirre has been the director of HR at Franklin County for the last 13 years. He notes that his department has nine employees who are charged with:

▸ Establishing, administering and effectively communicating sound policies, rules and practices that treat employees with dignity and equality while maintaining compliance with employment and labor laws, county policies and labor agreements.

▸ Providing services to the citizens and employees of Franklin County in order to secure, maintain and develop employment with the county government.

▸ Administering payroll and the county benefits program.

The first thing the HR department did after implementing ECM was to start scanning personnel files into the system. It took some time to develop an appropriate folder structure that separated employees' employment records from their confidential medical records and discipline files, and then it took about a year to get everything scanned in.

"We probably spent between 4-6 months in the planning phase, but getting those personnel files into the system properly has had an enormous payback for us," says Aguirre.

A few of the benefits include:

▸ **Reduced paper consumption.** "We used to photocopy hundreds of thousands of pages of job applications a year for review by our elected officials," says Aguirre. "We almost never make hard copies of documents anymore since our officials have access to everything they need in Laserfiche."

▸ **Instant search and retrieval.** "The ability to locate documents quickly is great for me," explains Aguirre. "Not a day goes by that I don't get a request from one of our directors for material from an employee's personnel file for various purposes. Our ECM system makes it easy for me to satisfy their requests and quickly email them exactly what they need to see."

▸ **Higher staff productivity.** "With ECM, we can do more with less and accomplish more functions with the remaining staff, which is important in this economy. When one of our part-time HR reps left the county, we didn't need to find a replacement because ECM makes everybody more efficient. Retrieving documents is as easy as opening a web page."

▸ **Reduced need for document storage.** "Prior to implementing ECM, we had a large 'Electreiver' file cabinet in the office that stored approximately 1,500 files and rotated them on chains. It was always breaking down and causing us headaches. Once we started digitizing our documents, we were able to get rid of that monster, along with five standing file cabinets. We now use that space for our receptionist's desk and our scanner, so our office is much less cramped," says Aguirre.

▸ **Easier audits.** "Auditors love Laserfiche because it's so fast and easy to use. It's also clear to them that we're meeting compliance mandates with regards to our folder structure and the security surrounding confidential medical records, etc. In addition, my department no longer has to stop working in order to organize for the audits."

Aguirre notes that in addition to managing personnel files in the ECM system, the HR department has also added recruitment documentation and union and arbitration files to the system, which has led to quicker resolution of some grievances. In addition, HR is currently most of the way through scanning employees' benefits files and leave of absence documents into the repository, and it has recently started on payroll documentation.

"Laserfiche is so secure in terms of access rights and privileges that we're comfortable using it for everything we've got," Aguirre says. "For example, I'm the only person in the HR department who can view the union files, and I'm also the only one with deletion rights. I know that unauthorized staff can't see confidential information, and I know that no one's going to tamper with our files. The role-based security provides real peace of mind."

City of Riverside

Although Riverside's HR department consists of six different divisions—Safety, Workers' Compensation, Benefits, Recruitment, Training and Administration—the department's 25 employees function as a united team. "Many people have expertise that spans multiple divisions," says Rhonda Strout, Human Resources Director. "Our goal is to find, train and retain the best talent for our city, and we work together to achieve that goal."

The department implemented ECM in 2002 to help reduce the volume of paperwork it produced, and to eliminate the need to store documents offsite—and time spent driving to the facility to retrieve them.

According to Mylene Daniels, Business Systems Support Analyst, she tightened up the system's security when she joined the HR team in 2006. Using the security features inherent in the city's ECM system, Daniels grants HR employees rights and permissions based on their role within the department. This means, for example, that an employee who does not work on administering employee benefits cannot see benefits-related documents, and an employee who only needs to review a certain type of document cannot move it from one folder to another.
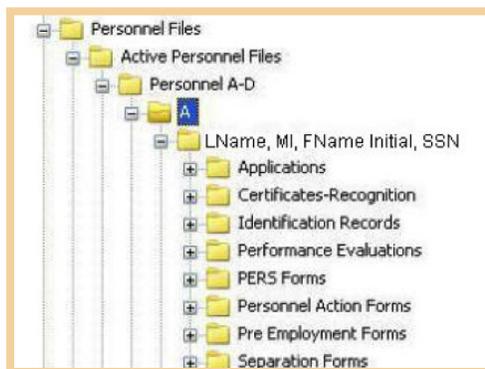
Strout notes that the folder structure of the department's three repositories—Benefits, Workers' Compensation and General HR—is clean and easy to navigate by topic. "Laserfiche makes it easy for all our employees to find information quickly and it keeps us organized."

In the future, the department plans to explore options for integrating its ECM system with the city's SharePoint intranet, and is also looking forward to using ECM to automate the leave request process. "It would be great to get the system set up so that it would automatically email people when they need to review a document, and then allow them to approve or deny requests right from the request form in Laserfiche," says Strout.

The Future of HR: Insight from Experts

The smartest technology investments align with the evolving needs of HR professionals and their parent organizations. Here are insights from two HR thought leaders on how technology and HR will interact in the future—so you can determine what tools are essential, today.

Chris Brablc is marketing manager for SmashFly Technologies, a Boston developer of human resources software. He discusses how automation facilitates recruitment and intelligence gathering.

Technology will help facilitate any strategy you're doing. But the strategy comes first. You have to understand how you want to interact with candidates. Then finding the technology that will help you do that and will measure those processes becomes really important.

The organizations that find true value in automation are making sure their jobs are promoted to the right channels. When a new job requisition comes along, you automatically have that job for that discipline go out to certain channels they have already pre-identified. Knowing what types of candidates you're looking to attract and distributing intelligently to sites they use is a good way to save recruiters' time, instead of actually posting to all these sites. You can look at candidates and better screen all those candidates and find the best one.

You can't automate everything, especially from a recruiting standpoint. You need one-on-one interaction. Automation should help you get to that goal, but it won't totally fulfill everything you do for that function. For a lot of clients—especially for technical talent—the skills are so diverse that screening those people and evaluating them is a little tougher.

The big thing overall is making sure you're measuring everything you're doing and attracting these folks and bringing them into the organization. Take a step back and say, for everyone we hired or moved to a new position, what has the success been of that employee? What tools and channels are we using to attract these folks? How have we been spending our money and what has the success been? Understand all the levers you're pulling from a requisition standpoint and be able to repeat them and hopefully improve.

Catherine Reynolds is principal recruiter and owner of OnBoard Recruitment Advisers, which specializes in analytics, insights and recruiting in the big data area. Analytics Week named her one of the Top 200 social media thought leaders in big data and analytics. She shares her thoughts on HR's technological past, present and future.

I started recruiting in October 1998. For the first six months of my recruiting career, I used a fax machine to send resumes. Job boards were in their infancy. Newbie recruiters were sent to a closet of filing cabinets where we mined paper files to gather contacts for our call lists.

Technology has changed, and will continue to evolve. Instead of mining data in the closet, we have open access to information through sites such as LinkedIn. By "we," I mean hiring managers, recruiters and candidates alike.

Yet all that data can be overwhelming. Sometimes it takes a call from a recruiter to tell a company's story and to engage a candidate in a specific opportunity. At its core, recruiting is storytelling. I tell a candidate's story to a company and a company's story to a candidate.

In the future, I see more companies creating virtual workforces for hard-to-find big data skills. The market will require it. Hiring the best talent will not be limited by geography. I also see data analytics applied in recruiting to predict points in time in which individuals are more likely to consider other opportunities. I am not a data scientist, but with my industry insight, I would love to participate in such an endeavor!
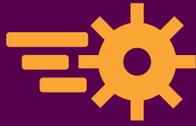
Conclusion

> " Organizations believe that investments in core HR functions are instrumental in enabling the strategic goals of the business, if they can overcome the tactical barriers of manual administration and lack of access to critical data. "

—Aberdeen Study: The Future of Core HR

A changing landscape in both technology and talent means HR must frequently seek out better tactics, processes and tools for performance. HR departments that rely on manual, paper-based processes are reexamining their infrastructures and finding that automation technology leads to many benefits, including better productivity, cost containment and compliance, awareness of employee and candidate talent and chances for strategic contribution to the organization.

As you begin to identify opportunities for HR automation, remember that automation is a means to an end. HR will always be about the people, and automation technology should serve those people, not replace them. As such, not every single aspect of HR can or should be automated; rather, automation should help HR professionals find and retain more talented individuals, collaborate with the organization and spend more time evaluating their workforce.
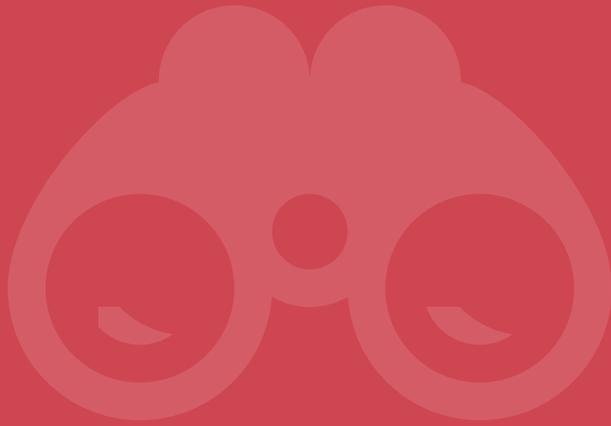
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Thanks for reading The Ultimate Guide to HR Automation.
We hope it helped answer some of your most pressing
questions and point you in the right direction.

Still, there's nothing like speaking to an expert and seeing a solution in action
firsthand. That's why we're happy to offer you a free 30-minute demo.

This 30-minute demo will get right to the heart of your document management
challenges and demonstrate the many Laserfiche features that will enable you to
cost effectively meet your organizational goals.

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This demo is, of course, free of charge and without obligation.

THE ULTIMATE GUIDE TO

HR
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