



# What HR Leaders Need In a Document Management Solution

**HR operations generate a lot of documents, which need to be tracked, stored, protected and kept up to date. Tangentially, they need an effective document management solution to help them be more secure, compliant and efficient.**

Many HR leaders assume that their spanking new human capital management (HCM) application provides effective document management. But after spending hours chasing down and aggregating file attachments and paper documents for an audit or legal discovery, they learned it doesn't. The truth is, even the most sophisticated HCM solutions can't do everything. According to Gartner, "By 2020, 30% of global midmarket and large enterprises will have invested in a cloud-deployed human capital management (HCM) suite for administrative HR and talent management, but will still need to source 20% to 30% of their HCM requirements via point solutions."<sup>1</sup>

OK, so what about adopting the enterprise content management (ECM) or content services solution the rest of your organization uses? Unfortunately, none of these general-use applications fully meet the rigorous demands of HR, so it makes sense to look for specific features that will satisfy your organization's needs. Simply put, a system should handle most of the daily document-management tasks automatically and streamline processes, allowing HR to focus on work that drives tangible value for the business.

**In this quick-hit guide, we'll discuss what capabilities you should look for in an HR document management system and how they fit into your organization's overall tech stack.**



# Planning Your HR Tech Stack

Smart HR departments are implementing comprehensive cloud-based human capital management (HCM) suites that bring speed and efficiency to just about every aspect of HR.

But, as sophisticated as they are, HCM systems aren't built to handle the documents that HR organizations manage every day. The question then becomes: *When should you implement document management as you build out the HR tech stack?*

**There are three answers to that question, depending on where a company is on the digital transformation path:**

## 1 Lagging behind

The HR team has not migrated to a cloud HCM solution or even selected one to implement. This delay can turn into an opportunity to get HR's document management house in order. Implementing a cloud HR document management system at this stage will help the organization achieve efficiency, be more compliant and secure employee documents in a digital repository. When the team is ready to implement a cloud HCM solution, the best HR document management solutions will easily integrate with the new system.

## 2 On the verge

If the team is close to making an HCM decision, implementing a cloud document management solution prior to doing so will smooth the transition. Rather than launching the new HCM with HR documents in different formats scattered among multiple physical and virtual locations, the team can "clean house" to get the most out of its new HCM solution. Best-in-class HR document management systems are HCM-agnostic and will easily integrate with any solution once live.

## 3 Leading the pack

If the team has implemented a cloud HCM in the past one to three years, it's likely identified a serious gap in the application's document management capabilities. Perhaps the HR team had to devote time and resources to manually gather documents for an audit or legal disclosure, or maybe its document retention processes fell out of compliance. A good HR document management solution can fill that gap, helping the team achieve its goals.

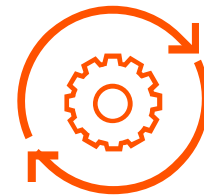
# What to Look for in an HR Document Management Solution

No matter how far along you are in your HR tech stack deployment, you've likely identified the need for a better way to manage your HR documents. But what capabilities should you look for in a solution? General document management systems can typically meet one or two of the criteria below, but to meet your HR function's complete requirements, you need a tailored solution that provides them all.



## ACCESS

A good HR document management system can serve as a central repository for all documents no matter their origin. It can handle digital and paper documents alike and integrate with your HRIS/HCM and HR point solutions to access documents stored within them. The solution should allow for easy digitization of paper documents without specialized hardware. It should be based on cloud technology, so your HR documents are available to authorized viewers wherever they are, whenever they need them and on all devices.



## EFFICIENCY

A central requirement of digital transformation is to make organizations more efficient, and the same goes for whatever HR document management solution you choose. Look for process automation, such as automatically indexing documents by metadata configurable to types, employees and other criteria. The system should automate repetitive workflows as well as provide self-service e-form creation and document uploading for employees and managers in order to free your staff up for more strategic work.



## COMPLIANCE

Falling out of compliance with data governance regulations can cost your company in fines, lawsuits and reputational damage. Your HR document management solution should help your organization remain in compliance by automatically enforcing document-level retention policies and flagging incomplete files or outdated documents. It should also simplify the job of securely gathering and sharing documents for an audit or legal discovery by allowing users to pull specific documents across all employee files without searching for them across systems and physical locations.



## SECURITY

The best HR document management systems will secure your employee data. Your solution should let you restrict access at the role, feature, geography and document level, as well as permit customized access. When sharing documents inside or outside the organization, you should be able to set an access expiration date and restrict printing or downloading to minimize risk. For temporary auditor and attorney access to multiple documents, you should have the ability to create secure virtual review rooms. The system should encrypt data at rest and in motion and generate a complete document-level audit trail.

➤ **HR has specific needs when it comes to document management, so it's important to choose a solution with these requirements built in.** CartaHR offers fast, secure compliant access to all your employee documents in the cloud. Spend more time on your organization's strategic initiatives, including employee experience and process improvement, and less time on back-office administration.

A man with short dark hair and a beard, wearing a blue textured sweater, is looking down at a laptop screen. He has a slight smile. The background is a blurred brick wall. The image is overlaid with a dark blue diagonal shape on the left side containing text and a button.

To learn how CartaHR  
can complete your  
HR organization's  
digital transformation,  
schedule a demo with  
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<sup>1</sup>Gartner, Hype Cycle for Human Capital Management Technology, 2019  
Published 23 July 2019 - ID G00371398.

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