



Streamlining HR Shared Services Processes at OpenText

OpenText digitizes thousands of global employee files and documents

Industry

Software provider

Customer

OPENTEXT
THE CONTENT EXPERTS

Business Challenges

- Inefficiencies from managing a paper-based filing system
- Large amounts of files of varying quality from acquisitions
- Seeking more efficient, less risky, easier to audit records management
- Needed to enable business continuity even in emergencies
- Compliance with worldwide data retention and document management standards

Business Solution

OpenText Employee File Management for SAP® Solutions

Business Benefits

- Improved customer service
- Reduced paper usage and administrative burden
- Reduced storage space and costs
- Created better audit trails
- Compliance with Data Protection Act
- Quicker integration of acquired companies with easier compliance checking of legal documents

OpenText is a world leader in Enterprise Content Management (ECM) software, helping companies get the most out of their content. Over 4,500 employees in 57 offices and 23 countries work toward this goal every day.

As a strategic business partner, the OpenText Human Resources department works to keep the company agile and delivering best-in-class service to its employees. HR Shared Services are centralized in three locations—Waterloo, Ontario, Reading, England, and Munich, Germany. They have employees, managers, and 40 HR managers as customers. It is a complex network of people who need access to employee files at any time of the day, regardless of time zone or office hours.

The challenges of managing files in a paper-based system

The HR department constantly works to improve and automate its processes and systems. With a paper-based system in place, staff had to deal with the tedious and time-consuming tasks associated with managing paper files. Plus, employee files squeezed staff into cramped workspaces or forced them to work offsite just to make room for all the filing cabinets.

In the case of an acquisition, the accuracy of an acquired company's files often differed, and so the quick assimilation and audit of these files into a larger, company-wide filing system were a compliance and legal priority. If there was a subsequent reduction in force, it was also a priority to be able to access these files quickly and in any location.

Maintaining business continuity was also a concern. "Getting access to files in an emergency used to require waking people up in the middle of the night to physically go into the office and retrieve the necessary files. In addition, if something were to happen in Waterloo, Reading, or Munich, we would lose every single file for that area. So for the purpose of disaster recovery, we wanted something that would enable us to get to a business-as-usual state as soon as possible," says Tracy Sinclair, Director, Global M&A and HR Systems, OpenText.

Storing and managing paper documents became costly, inefficient, and unsustainable in light of the company's tremendous growth. A choice needed to be made—increase spending on new resources and infrastructure or invest in technology solutions that could directly address these challenges.

OpenText's own product provides a ready solution to HR challenges

With the depth and breadth of OpenText ECM Suite, the HR team easily found a solution to meet their needs. OpenText Employee File Management for SAP Solutions (EFM) centralizes and displays HR master data and statements, along with original, worker-related paper documents for employees in the SAP ERP Human Capital Management solution. HR staff can process personnel tasks faster with fewer errors, reducing time spent on labor-intensive, administrative tasks.





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Tracy Sinclair, Director, Global M&A and HR Systems, OpenText

Implementing EFM involved streamlining the documents managed by HR Services, creating a single picture view of their information, rebuilding reminders, and shifting old processes to new, paperless ones. A folder structure was created based on the employee life cycle. “It helped us to actually have a preset format to say, ‘Okay. Here are your folders. Here are your sub-folders. Here are the document types that you should be looking to file and here are all the columns that you need to fill in, here are the security access roles and who needs access to what folder. Here are all the document retention periods for each document, and the info type they relate to. It was basically one spreadsheet that had absolutely everything on there and was invaluable to us moving forward,” says Sinclair.

The initial implementation rolled out over approximately five weeks and focused on new documents, managing this change within Human Resources, and altering the filing practices. Historical information was reviewed to see what was necessary to retain, and then entered into the system. In phase three, guest access will be implemented.

Currently, the system is used across 15 offices in eight countries. Worldwide rollout via the online Employee and Manager Self Service system is expected in the next fiscal year. This will include full integration with payroll, which is expected to further reduce the use of paper, time spent filing, and streamline audit processes. To assist with the input of historical information, particularly from previous acquisitions, the solution team is looking at other OpenText products.

Quick and easy personnel processes

OpenText Employee File Management *for SAP Solutions* saves time for everyone on the HR staff, primarily by reducing the administrative burden. “Some of the immediate feedback I hear from the team is how great it is that they no longer have to spend so much of their time filing and sorting through piles of paper documents and copying files for distribution. So this has an immediate impact on their daily jobs and among other things allows them to focus on more value-added activities. The engagement of the team has definitely increased as a result,” says Sinclair.

EFM has helped HR introduce more standardization regarding file management. “Previously, some of our field associates were copying files and maintaining their own filing record system. We’ve been able to standardize and introduce more controls in the process to help eliminate duplications and errors that can crop up when people are maintaining their own filing systems,” says Sinclair.

More than an eliminator of filing and facilitator of streamlined file controls, Employee File Management *for SAP Solutions* also shifted employee behavior. As the implementation began, HR employees examined existing processes and offered input on how to improve the way the department worked. EFM and its seamless integration with SAP ERP systems helps the staff break free of their administrative roles and take a more strategic approach to their jobs, whether they are dealing with pay change requests and approvals or auditing employee records.

Enhanced reporting processes and audits

Having easy access to all pertinent information in an employee’s file has made reporting and audits much easier for HR staff.

Employee File Management also works to prevent files from going missing or getting left behind. Its Tamper-Proof Archiving and Documents, and Approval for Deletion of Documents functions augment the manual controls already in place, creating more security for sensitive employee information.

The new solution also helps the team ensure the security of their files. With EFM, which is compliant with the Data Protection Act, access to confidential information is controlled and secure—only people with the right permissions can access certain data.

Conclusion

By taking control of its employee files, OpenText Human Resources helped to reduce redundancies and waste, increase security, and streamline records for all 4,500 employees, all in a pain-free implementation process.

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