

Advanced HR Automation

Employee Records in Laserfiche Walk-Through

Beau Lollar
Senior Chief Engineer
DocuNav Solutions

Background & History

Beau Lollar

❖ Career

- ✓ Senior Chief Engineer
- ✓ 25+ years working in IT
- ✓ 20+ years working with Laserfiche & other ECM's
- ✓ 11+ years with DocuNav Solutions

❖ Personal

- ✓ Born & raised in Denver Colorado
- ✓ Married & 1 daughter
- ✓ Rescue & Foster Dogs (200+ so far)



What Are Employee Records

Employee Records Repository

- Stores records relating to an employee: HR, Benefits, Payroll, Risk Management, Fleet, ...
- Creates a single folder for each employee but limits access at the document level
- Requires data to be available from HRIS system to fill fields & provide logic for links
- Filling fields, folder structure, & security built/applied by Workflow when the document is filed

Document Questions

- What types of documents are being stored?
- What fields need to be collected for each to be able to file & link documents?
- What folder structure & naming convention should be applied?
- Who should be able to access each document & what levels to apply?
- What retention should be applied & who should be able to perform Records Management actions?

Automation Questions

- What 3rd party applications do we need to connect to query the various template data?
- What connection methods are available from the 3rd party vendor/application for backend automation?
 - Direct database connection, API, Data dump, ...
- Is front-side integration needed & if so, what?
 - Direct access via 3rd party application
 - Linked via toolbar/Connector
- Where will new documents be brought in from?
 - Scan/Snapshot, ImportAgent, QuickFields, Forms, DocuSign, API, SDK, ...

Advanced Options

- Automate import of documents from 3rd party sources
 - Determine access options provided by 3rd party
 - Create SSIS package, Workflow, ImportAgent, QuickFields, or other process to schedule import
- Allowing Employees direct access to their documents
 - Permanent Access: Securing for employee's account & providing access via WebLink
 - Temporary Access: Post documents to employee via Direct Share

Advanced Options

- Validate employee folder contains all necessary documents based on job type
- Automate expiration of documents to notify managers/employee & trigger Forms
- Write data collected from Forms into HRIS
 - Determine data to write & 3rd party tools option to interface (e.g. staging tables, API, ...)
- Forms Processes
 - Employee On-Boarding, Contracts, & Off-Boarding
 - Personnel Action Form, Payroll Calculation, & Account Creation/Maintenance

Laserfiche® Demonstration

DocuNav Solutions



Advanced HR Automation

Questions?

THANK YOU!

COMPANY NAME

