



TRANSFORMING
YOUR HUMAN RESOURCES
DEPARTMENT WITH
DOCUMENT MANAGEMENT

 **REVVER**



Redundant processes are the bane to productivity and efficiency. They get in the way of getting real work done, and more often than not in the HR world, it's usually concerning document-based work. Staying organized and being an excellent record-keeper are a big part of HR, but it's not the only thing that matters. Your HR department's main focus should be people and not paper. When you want to focus your time and energy toward projects like training and development, improving employee relations, or setting up improved benefits packages, you get sidelined by filing documents.

Oftentimes we get stuck doing the same tasks over and over. When a new employee gets onboarded, a new file needs to be created and filled with the necessary documents, then filed into the correct spot in your filing system. Whether it's with physical or digital documents, you need to manually create the folder structure for every new employee.

It's also up to HR to ensure that employee records are being kept in a manner that's compliant with government and industry standards, and also makes employee privacy a priority.

It may not seem like that would take up much time, but whole workdays can be spent on making sure your filing cabinet is in order and that you're consistently using a standard filing system to organize by. Keeping your files in a uniform filing system is essential to being able to find things in the future. It's important to keep a standardized filing system so that everyone is on the same page.

The easiest way to do this is by using a document management system, which is a solution that does more than just store documents but employs intelligent organization and automation tools to streamline previous paperwork processes.

WHY TEMPLATES ARE IMPORTANT

Using a digital system gives you the distinct advantage of being able to copy documents and folders with just a couple clicks of the mouse. So making a template for your folder structures is a simple matter. You can create an empty structure of your most commonly used categories with all the correct subfolders and necessary files that you can then replicate as easily as right-clicking and applying it to the folder you want.

For example, you can apply a common folder structure for every new employee you onboard keeping your file structure consistent for every employee and removing the manual work of having to re-create a file structure every time you onboard a new employee. This structure can include folders for their benefits, payroll, PTO, as well as standard documents including the employee handbook.

However, there's still more work that goes into creating new folders for HR record-keeping. In order to stay compliant, certain records need to have permissions attached to them so only authorized users on the system

can access them. Furthermore, retention rules need to be set for records that need to be purged after an allotted period of time.

Fortunately, folder templates in Revver not only allow you to create ready-made folder structures with just a right click of your mouse, but it allows you to apply a number of settings, rules, and automation to your future documents, without having to do it more than once. These include permissions and retention.

This will save you a lot of time and make the task of organizing your HR records much more efficient. Furthermore, it will save you from potential issues that result from human error when working manually. Since you're applying the same standards you applied the first time, there's less of a chance of accidentally applying the wrong standard like attaching the wrong retention date.

CREATE YOUR TEMPLATE

The first step for your template is to lay out your preferred folder structure. You can do this in the template creation screen in Revver, and build it as you would on a file explorer interface.

Add as many folders and subfolders as you need, then add the documents you want to be copied and placed in each new folder structure. For HR, this can include documents and forms you want each employee to have, like the employee handbook.

The other component to folder template structures is predefined file names. These are stand-in names for files you can select whenever you add a new file to a folder.

TIPS FOR CREATING YOUR FOLDER STRUCTURE

When Labeling Folders, Don't Be Vague

Label your folders according to broad, yet clear categories that make sense to your work. Common labels include client, project, or department.

Use Dates

As most records are based on timed events, it'd be easier to find a document from a specific data when sorted into subfolders based on year and month.

Be Consistent and Intuitive

Whatever type of filing system you start to build, you need to be consistent and stick to your own rules. You need to create a system not just for yourself, but for everyone.

Don't Delay, File As You Go

Make it a habit to immediately file a document as soon as it comes across your desk or desktop.

With the folder structure built, it's now time to apply all the common settings and rules you want to be built into the templates as well. All these settings apply each time you use the template. Even if you had a folder structure template you could copy and paste whenever you want, still having to manually go in and apply your preferences each time you create a new folder defeats the purpose. This feature is what truly makes templates on Revver exceptional and is what prevents you from repeating work you've already done.

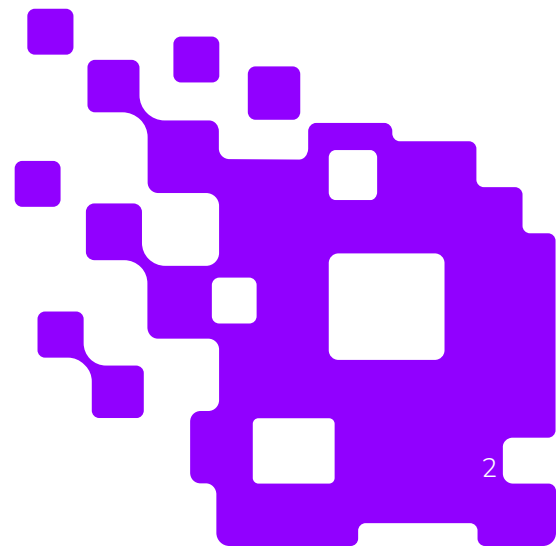
PROFILES

A document's profile is a set of metadata that helps the system find it even faster when searching for it. Profiles consist of keywords and text representing key information and what you'd likely input when searching for the document.

You can add profile fields to your templates which consist of common descriptors of documents you'd put in the folder. For example, for an employee file, the profile you'd want to add would likely include the first name and last name, department, employee ID, and any other information relevant to the folder.

Say if you put new or additional documents from employee John Doe in the John Doe folder, the system will automatically apply the profile information you set to that document for making later retrieval quick and easy because of the set tags you created to search by.

Profiles and profile items are made in the separate profile builder in the Revver admin screen. Individual document profiles can be filled out manually or automatically through Zonal OCR which utilizes scan templates to identify and match predetermined fields to profile items.



PERMISSIONS

Now it's time to apply some security to your templates. Employee records can't be open and available to everyone in the company, let alone everyone in the HR department. There's a strict hierarchy of access that needs to be enforced in order to stay compliant.

For companies using Revver that have multiple units, especially in separate departments, it's paramount to set-up boundaries between the different cabinets where documents are accessed. Revver does this through group-based permissions. Users are sorted into groups which can then be granted permissions to access authorized cabinets, drawers, and folders. Furthermore, different levels of permissions can be applied to users which allow them to perform certain actions such as viewing documents, but not downloading them. It also prevents users from deleting important documents.

Permissions can be set for individual documents in the properties window, but can also be applied to templates. When you have a certain type of folder and you already know who should have access to current and future folders of this type, the permissions will automatically be applied whenever you use the template.

GOVERNANCE AND AUTOMATION

Templates in Revver have the unique feature to apply governance and automation rules to the folders and documents created each time a template is used. These are simple rules that dictate certain actions to happen when specified conditions are met.

Governance is used to apply a selected action to take place after a certain amount of time. This is primarily used for retention rules, which is essential for compliance issues. If an employee leaves the company and you move their file into the archive folder, you'll need to apply retention dates to each document for when they're approved to be purged from your system. Governance is also useful for setting up notifications for users to take action on certain documents.

For example, employee review documentation can be set on an annual or semi-annual timer to remind you to conduct a follow-up.

Automation rules are applied to folders to perform actions when something in the folder changes, such as if a document is uploaded or downloaded. You can tell the system to perform an action such as notifying or emailing you or specified user when one of these occurs.

For example, if you create an updated employee handbook, it's possible to set the system to notify and email all employees when you upload it to the folder. Likewise, if you're waiting for a user to upload a form that you're waiting for, the system can notify you. Automation rules are also the key to automatically triggering workflows which can further automate certain processes for your company.

HOW TO USE TEMPLATES

Your template is complete. It has your desired folder structure, as well as the preferences that will make future documents secure and make your role as an HR specialist more efficient. There are several ways you can use your templates to save yourself from repeated work so you can get back to working with people.

Template Libraries

Revver is all about organization, and templates help you accomplish that, but it also helps you organize your templates. You can create different template libraries to categorize the many different templates you use. You have a near unlimited amount of templates you can create and save, so you can create different templates for different employee types, for payroll, for different departments, etc.

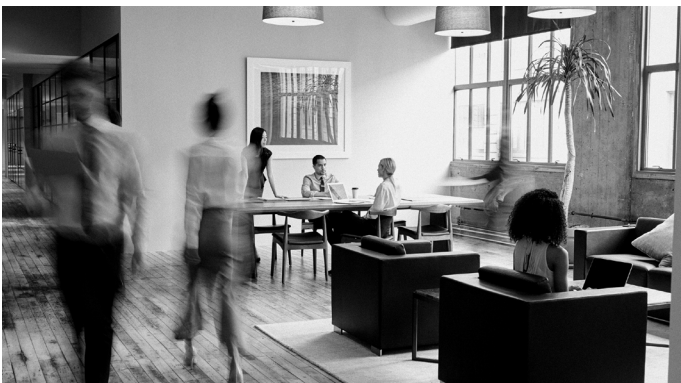
Mass Apply Templates

You can apply your templates to individual folders, but you can save time by using the mass apply option for a large volume of folders. You may have folders for each employee, but they lack the folder structure and permissions you require. Mass applying your template to the drawer for employees will apply your template to all of the folders currently in the drawer.

In Revver, you can mass apply templates by right-clicking the cabinet, drawer, or folder you want the template to apply within, and select "mass apply template." Select the template from your template library and refresh the page.

Sync Templates

One of the best aspects of templates is the fact that it sticks with the folders you apply it to. If you want to make an alteration to your template, you don't have to reapply it to your folders. Instead, you can make your changes to the template and sync it to the folders you've already applied the template to. Your changes will be reflected across every folder connected to that template.





CONCLUSION

When your job as an HR professional ends up becoming more about the paperwork than the people, it's time to start looking into better ways to deal with that type of work. As businesses grow and take on more people the paperwork is going to grow, and for many companies, it's not in the cards to take on more HR labor just to address the volumes of paperwork.

So it's imperative for businesses to come up with strategies and solutions to cut down on mundane work that doesn't contribute to the growth of the business. Businesses need to look toward tech to eliminate the redundant processes that take up so much labor such as maintaining paperwork. Something as simple as making sure employee files are organized, consistent, and compliant take up more time as the business grows, drawing resources away from more important HR functions such as employee retention.

Tools like folder templates save more time than you think. Being able to just do the work once keeps your schedule clear of those repetitive tasks so more of your focus and effort can go into true HR work.

If you want to see templates in action, as well as the rest of what Revver has to offer, let's talk. You can see for yourself how our document management service can improve how you do work.

Let's Talk >



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