THE 2018 ULTIMATE AUTOMATION TOOLKIT

HUMAN RESOURCES EDITION

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FOREWORD

What's the current state of your Human Resources department?

Do you face challenges related to:

- High Employee Turnover
- Undocumented or Inconsistent Processes
- Excel Spreadsheet Overload
- No Plan for Disaster Recovery
- SharePoint Confusion

In this handpicked collection of articles, you'll discover how an Enterprise Automation Platform can help your team solve your most pressing problems, while becoming more organized and consistent in your daily processes.

Are you ready for automation? Schedule a meeting with one of our automation experts to see if an **Enterprise Automation Platform** is right for you!

SCHEDULE A MEETING

WHAT HR AUTOMATION MEANS FOR THE HUMAN RESOURCES WORLD

In the world of Human Resources, you're probably bogged down with a slew of responsibilities: paperwork, training, hiring, firing, payroll, and regulatory compliance between employees. Your world, unfortunately, largely consists of manual tasks and work, and as a result, it is slow.

You may find yourself limited when trying to reach your department's full potential due to iterative, manual tasks that don't bring in revenue or provide actual value to your business. This can make any budgeting or additional resources for HR difficult – it may even feel like no one's on your side.

Don't let HR be a drag. Let's explore some ways you can enlist automation tools to help solve the setbacks brought on – and perpetuated – by manual tasks.

THE AMENITIES OF HR AUTOMATION

HR Automation eliminates the need to do things you'd otherwise have to do by hand. Filling out paperwork and entering line items, one by one? Gone. Checking your inbox repeatedly (and maybe obsessively)? Say goodbye. Notifying your manager that something's done and needs to be approved? No longer an issue.

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WHAT HR AUTOMATION MEANS FOR THE HUMAN RESOURCES WORLD

An automated system means:

More done in less time: Recurring tasks, such as payroll, take a long time to do every week, especially with PTO, taxes, and any other garnishments to consider. Free up your HR staff to do more in less time, and you'll start seeing the results.

Profitability: Getting more done faster means you'll be more profitable as a business. This also allows staff to focus more time on training new hires and setting them up for success.

Minimized human error: With less spreadsheet entry and paper pushing, you won't have to worry about a wrong number or misspelling from someone's name going through. Being able to scan documents and have software pull the information means it's automatically indexed, without the filing and stress.

Access for everyone: If employees need to submit requests for PTO or sign new hire documents, they can get to where they need, without the hassle. Signing digitally makes processing more convenient than ever, making processing updated W-4s, tax forms, and health insurance that much easier.

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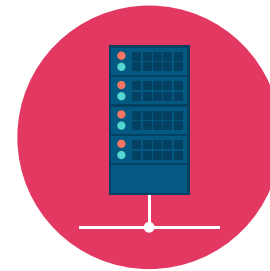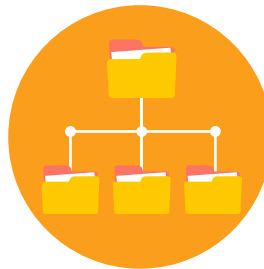# WHAT HR AUTOMATION MEANS FOR THE HUMAN RESOURCES WORLD

WHAT THIS MEANS FOR HR

For many industries – and HR especially – automation eliminates the need for dusty file cabinets and storage rooms. The system enables work and doesn't inhibit progress; it secures sensitive employee data and legal issues. You'll be free from the confinement of manila envelopes and paper forever.

HR Automation provides an open window to facilitate communication and improve the quality of work you're doing on a day-to-day basis. You're able to accurately capture, store, and secure incoming information that circulates in an organized and controlled way.

This is especially true for onboarding, when new hires are required to fill out a plethora of documentation and sign non-compete agreements, non-disclosures, tax forms, and more. Simplifying this process means HR staff can use this time to train instead of spending it on onboarding, which is tedious in and of itself for everyone.

Adding employees to software, authorizing them with IT, getting their email booted up, all of that can be automated, and the time cut down considerably with automation technology.

WHAT HR AUTOMATION MEANS FOR THE HUMAN RESOURCES WORLD

As we've mentioned, HR Automation helps simplify tasks such as:

- Employee hiring and training
- Onboarding
- Payroll
- Employee benefits, such as 401(k) and health insurance
- Tax documentation
- Document storing, organizing, and filing
- Securing sensitive information
- Storing data, such as photos and all file types

Are you ready to simplify your workplace, and make it easier to get the important things done in HR? A lot's riding on hiring, training, and everything that comes after.

LEARN HOW HR AUTOMATION CAN HELP YOUR ORGANIZATION

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HR DOCUMENT MANAGEMENT SOFTWARE: IT'S HERE

HR departments are widely known for having too much work and not enough qualified people to do the work. It's also a common misconception that the HR department derives little value and instead is costly to the business.

So, you may be asking yourself (as many of us are in this day and age), how can I enlist software to overcome these common problems with management, HR, and costs? Document Management software is a direct antidote to the time-consuming tasks of HR – i.e. evolving technology roadblocks, recurring data entry in multiple systems, paperwork, and even hiring/retaining productive workers to get the job done.

By leveraging software, you can eliminate common problems and bring considerable value to your organization by freeing up HR's time for higher-level tasks. Let's explore how that can be accomplished.

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HR DOCUMENT MANAGEMENT SOFTWARE: IT'S HERE

UNDERSTANDING HR AUTOMATION SOFTWARE

As we mentioned before, there are lots of bottlenecks in HR departments, many that consist of time-consuming tasks that eat up the work day over and over again. The root of the problem lies in numerous projects that require manual or duplicate data entry, or simple, iterative processes that are much better off automated.

Wouldn't it be nice not to have to compile paper forms every single time there's a new hire, for example?

At the end of the day, HR Document Management software is all about improving processes and making the daily grind of HR easier and more manageable.

ARE YOU READY FOR AUTOMATION?

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HR DOCUMENT MANAGEMENT SOFTWARE: IT'S HERE

Here's the rundown of how it's done with a Document Management System:

- Electronic forms allow you to collect and share information for employees internally with one click
- Software integrates with ubiquitous business applications like SAP and Oracle, so there's no need for duplicate entries
- Robotic Process Automation & Robotic Workflow Automation automatically deliver all the necessary paperwork (W-4, NDA, etc.) to new hires to catalyze the process of getting them started
- Ongoing workflows can be established for annual reviews and promotions, so no employee gets left behind
- Task routing enlists Workflow Automation – designed by decision-makers – to ensure all common HR processes follow the same framework
- Security operates through permission-based access, so there's no risk of prying employee eyes where they don't belong

Paper shuffling and lost documents rob valuable time from HR, but as you've gathered, it doesn't have to be that way any longer. With Document Management, you have access to a digital library where everything you need is only a quick search away. No thumbing through manila envelopes or sending an email to find out where Becky put the emergency contact information; it's all right there, indexed and all.

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HR DOCUMENT MANAGEMENT SOFTWARE: IT'S HERE

REAL-WORLD SCENARIOS, SOLVED

Let's take some concrete problems from HR departments and explain how Document Management solves them:

Problem: Hiring and retaining talent

Solution: One of the hardest tasks often routed to HR is hiring and retaining workers. Turnover can cause a riptide of problems, as training new employees takes time away from the all-star talent on your team, and paperwork climbs and climbs as a result. One of the biggest incentives to keep employees (especially Millennials) is the opportunity for more challenging work, and the chance for more responsibility.

With Workflow Automation, all of the core housekeeping tasks are accounted for; you just need to monitor and review the documents that are going through. Not only does this make the internal review process better, but it also gives your HR team more time to focus on higher-level tasks and work that's fulfilling and valuable for the organization. Keep in mind, not all incentives need to be financial – with software, you can keep your employees' satisfaction and ongoing growth top-of-mind.

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Problem: Constantly evolving technology

Solution: Between payroll and other computer-based technology implementations, it's hard to decide what will work best in your organization. You need a software solution that will integrate well with other common applications, has a quick training period for employees, and has a painless implementation process – not to mention one that will show a substantial return on investment (ROI).

Document Management often shows ROI in less than 12 months for businesses, not to mention that updates are automatic and don't require on-premise hardware or equipment. While the software is particularly helpful for HR for onboarding purposes and other iterative processes, Document Management is relevant for everyone, since it makes finding the right invoice or employee information seamless. With a reputable vendor, you'll never have to worry about the downtime or a considerable gap in understanding when you upgrade the software, either! Many have learning libraries and other opportunities for continuing education to help you make the most out of your software package.

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HR DOCUMENT MANAGEMENT SOFTWARE: IT'S HERE

BE THE OFFICE HERO, AND RESCUE THE HR DEPT. FROM THE DEPTHS OF HELL

Are you ready to solve all of your organization's constant problems and bottlenecks? It's time to take back your time, and enhance your employees' collective happiness. Get a customized demo or feel free to watch our most recent webinar on a Document Management buyer's guide here!

USE TECHNOLOGY TO IMPROVE YOUR EMPLOYEES' WORK EXPERIENCE

These days, many companies are trying to improve their culture by providing employees with special perks and benefits. As the new generation is entering the workforce, Millennial-friendly companies are getting creative, some of them going as far as having game rooms and kegerators (that's a fridge for a keg).

While it's important to be conscious of your employees' work experience and level of satisfaction, there are other options. For example, investing in technology can improve your employees' work experience while also providing a nice return on investment.

Here are some ideas for using technology to improve your employees' work experience without breaking the budget.

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USE TECHNOLOGY TO IMPROVE YOUR EMPLOYEES' WORK EXPERIENCE

KEEP THE COMPANY ORGANIZED

Document Management software: There aren't many things that are more frustrating than working at a disorganized company. It's difficult to find the supplies and documentation you need. Even worse, communication suffers. All of this makes it hard for people to do their jobs. A good Document Management software solution can help with your company's organization by allowing documents to be stored in one place, filed appropriately, and accessible remotely from anywhere with an internet connection. This means employees don't have to sit and wait for documents to be retrieved by file room clerks. With the click of a button, they can pull up the documents they are looking for.

Using Document Management software also shows that your company is up to date on the latest technology available. The most Millennial-friendly companies have already caught on to the fact that Millennials expect this kind of technology to be used in the workplace.

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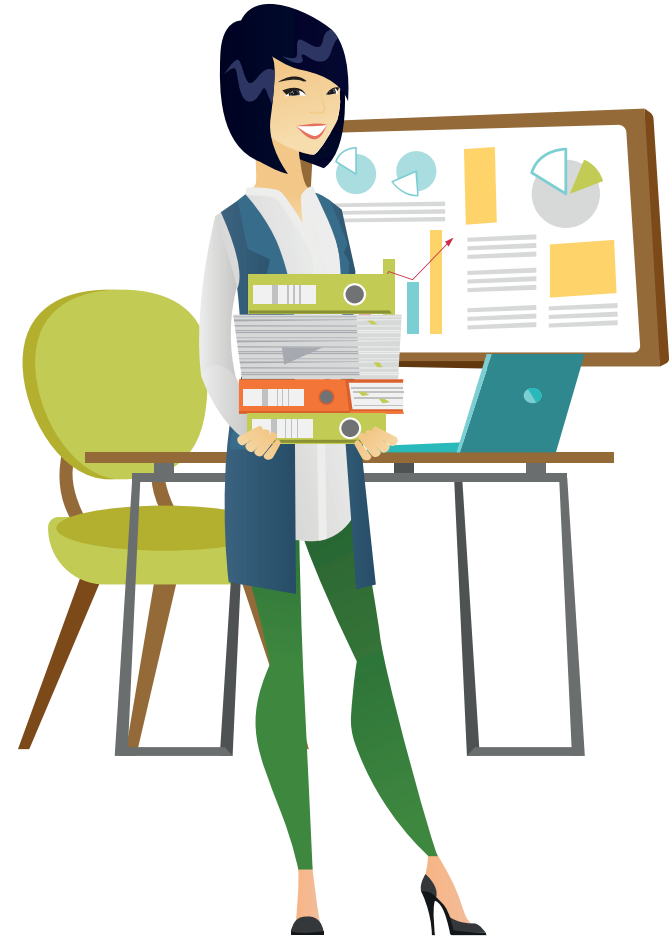
USE TECHNOLOGY TO IMPROVE YOUR EMPLOYEES' WORK EXPERIENCE

MINIMIZE THE TEDIUM

Robotic Process Automation: Do you have employees who spend most of the day doing tedious tasks like entering data, sending reminder emails, or delivering documents? We're talking about the kinds of tasks that just require a body, but not much brain engagement. What if you could automate these tedious tasks and free your employees to do higher value work? This is exactly what Robotic Process Automation can do for your company.
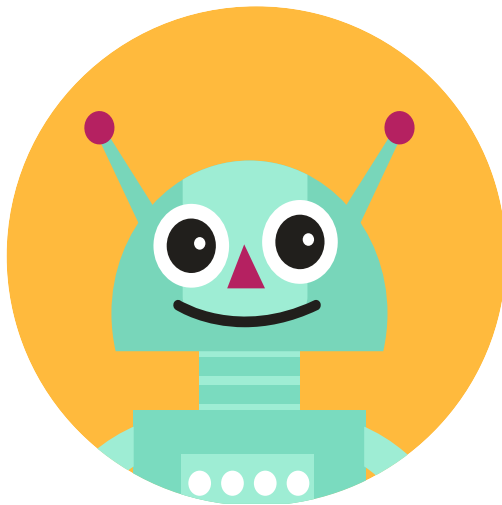
Let's take a look at a specific example of Robotic Process Automation within the accounting world. It's called Robotic Accounting Automation. Companies that use Robotic Accounting Automation enjoy automated data entry, Document Management software, automated GL coding, and automated 3-way matching. This is a huge reduction of manual work for accounting employees. Additionally, Robotic Accounting Automation allows teams to assign bots (software robots) to monitor email accounts for electronic invoices, and it can send out automated notifications. Basically, Robotic Accounting Automation means that employees are presented with high-value work when it's ready to be completed, without having to do the tedious, backend tasks to prepare the work items. This frees them to focus on real priorities!

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USE TECHNOLOGY TO IMPROVE YOUR EMPLOYEES' WORK EXPERIENCE

BE FLEXIBLE

Today's workers are looking for a workplace with flexibility. Millennial-friendly companies tend to be those that offer relaxed dress codes, flexible schedules, and the possibility of working from home. Here are some strategies for using technology to increase your company's flexibility:

The cloud: Whether they're using Robotic Process Automation, Document Management software, or another solution, many companies are storing documents and processes in the cloud. This allows team members to access them whenever they need to, and it helps companies better manage their local storage capacity.

Working remotely: All of the technology discussed above can help you allow your team members to work remotely. This will make your team happy, and it will also help you free yourself of geographical limitations when hiring. Just make sure that you clearly define the rules for employees working from home.

Millennial-friendly policies: The more you keep up with technological advances, the more Millennial-friendly your workplace will be able to be. You don't have to go as far as providing your employees with a fleet of on-demand cars (like Google did), but consider that the Millennial generation (those born between the early 1980s and the early 2000s) grew up with computers in their bedrooms and cellphones in their hands. Investing in workplace technology can help companies who are trying to recruit new talent and train up the next generation of business leaders.
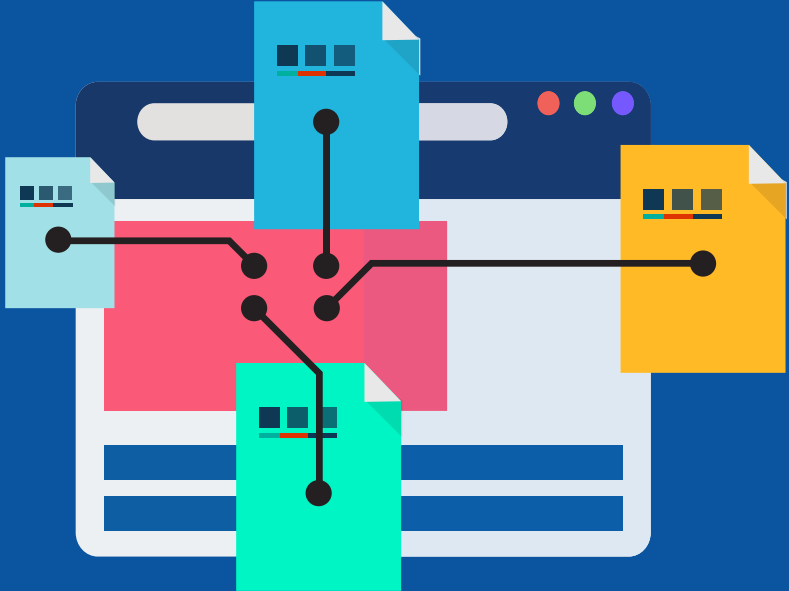
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USE TECHNOLOGY TO IMPROVE YOUR EMPLOYEES' WORK EXPERIENCE

As you consider your company's future, think of investing in technology as a way to improve not only your employees' work experience, but also your business practices as a whole. What it boils down to is this: technology will allow your team members to save time and to do higher level work. This is a win-win because it makes your employees happier while also improving your bottom line.

Here at DocuPhase, we use our own platform, which includes Robotic Process Automation and Document Management solutions. Our employees enjoy the flexibility these solutions bring, and we enjoy doing higher level work.

In fact, there are no administrative assistant jobs here at DocuPhase. We have the bots for that!

To see a custom demo of our platform (Robotic Accounting Automation and Document Management software), sign up here. Your employees will thank you!

SCHEDULE A CUSTOM DEMO TO LEARN HOW HR AUTOMATION CAN HELP YOUR ORGANIZATION

SCHEDULE A MEETING

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10 HUMAN RESOURCES TASKS YOU SHOULD BE AUTOMATING

Where do you see automation in your daily life? It's everywhere! Each time your order a pizza online, run your Roomba vacuum, or use your smart phone to adjust the temperature or lights in your home, you're using an automated system that does work for you.

What about automation in the workplace? Maybe you're fortunate enough to work at a company where paperwork, filing, and notifications are all automated. These are all great candidates for automation, along with other repetitive tasks that eat up so much of our time at work.

Today we're going to look at ten Human Resources tasks that you can and should be automating. These are tasks that cause unneeded stress and, when done manually, can lead to potential errors, compliance issues, and data loss.

According to Forbes.com, "most HR processes can now be automated." It's time to stop accepting HR as a department that is full of manual processes, mind-numbing repetition, piles of paperwork, and other stressors, and start enjoying the benefits of HR Automation.

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10 HUMAN RESOURCES TASKS YOU SHOULD BE AUTOMATING

1. UPDATE BENEFITS SELECTIONS

If you've ever worked in or around an HR department, you know all about the horror of Open Enrollment. This is the hectic window of time when every employee in your organization must assess his or her benefits, and make whatever changes are desired.

As if understanding the benefits themselves isn't difficult enough, you must also manage all of the paperwork and data entry involved in making changes. When employees wait right up until the deadline, or even beyond it (as they often do), you're left burning the midnight oil, trying to meet your own deadlines.

With an automated benefits process, employees can access a self-service portal and make their own selections. Since the process is electronic, there's no need for you to enter the data in any other system, especially when the portal can be integrated with whatever HR software you already use.

Use a Workflow Automation platform to automate email notifications.

LEARN MORE

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10 HUMAN RESOURCES TASKS YOU SHOULD BE AUTOMATING

2. PROCESS PTO REQUESTS

If you're still using Outlook to submit and approve paid time off requests, you're behind the times. For a more consistent PTO request process, you can set up a workflow within your Enterprise Automation Platform, kicking it off with a customized electronic form that employees fill out whenever they want to take time off. From there, the system automatically reviews their available PTO and routes the request to the appropriate manager for approval or denial. Both parties are reminded when the PTO date arrives, and payroll is automatically notified of the difference in hours and pay codes.

3. UPDATE EMPLOYEE DATA ONCE, ACROSS ALL OF YOUR SYSTEMS

When an employee has a change of address or any other update, it can be requested through a self-service employee portal. From there, the data can be pushed to any other systems you wish to connect to the portal. That way, information is entered only once, and administrative errors are avoided.

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4. SEND REMINDERS OF EMPLOYEE REVIEWS

It's a common problem – employee reviews fall through the cracks when more pressing matters require the attention of management. From there, they're forgotten about for weeks, or maybe even months. HR Process Automation tools can help you keep track of these important dates, even allowing you to "snooze" reviews and other related tasks in the event that you aren't quite ready and need to postpone briefly. Without fail, you'll continue to be reminded, which will help you stay on top of your employee review schedule.

What's more, an Enterprise Automation Platform can provide you with the analytics you need to be able to assess your team's performance. You can see how much work is being done, along with how long each task takes to be completed. Over time, these analytics can show improvement or declines in performance, and they can be used to set goals.

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5. ORGANIZE, INDEX, AND FILE NEW HIRE PAPERWORK

What does a new hire packet look like at your organization? Is it a binder full of forms to be filled out, signed, and filed manually? Aside from the unnecessary manual labor involved, how much money is your organization wasting on all of that paper? The time and money spent on onboarding has a concrete impact on the bottom line, especially if you're in an industry with a high turnover rate.
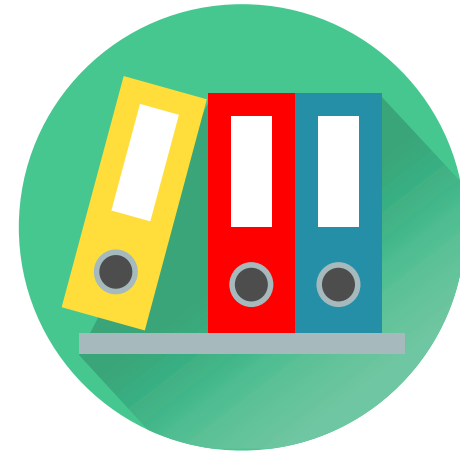
These expenditures can be minimized through automated HR onboarding. With an automated step-by-step process, HR managers can dramatically cut onboarding time, all while ensuring consistency in each new hire's onboarding experience. Training materials can be standardized. Benefits packages can be always at-the-ready, without the need to print out a large packet of varying documents. Better yet, each step in the process is signed off on by the person responsible for completing it, so nothing falls through the cracks.

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6. ENSURE COMPLIANCE

According to an article on benefitspro.com, "I-9 compliance is an area with significant potential financial risk for employers because ICE is reaching settlements for technical violations (completing the form incorrectly). For example, Abercrombie & Fitch, which uses an electronic system, recently reached a $1.04 million dollar settlement with ICE for technical violations."

With such stringent requirements around I-9s and other HR-related documentation, it's more important than ever to have HR Document Management software that can organize your files.
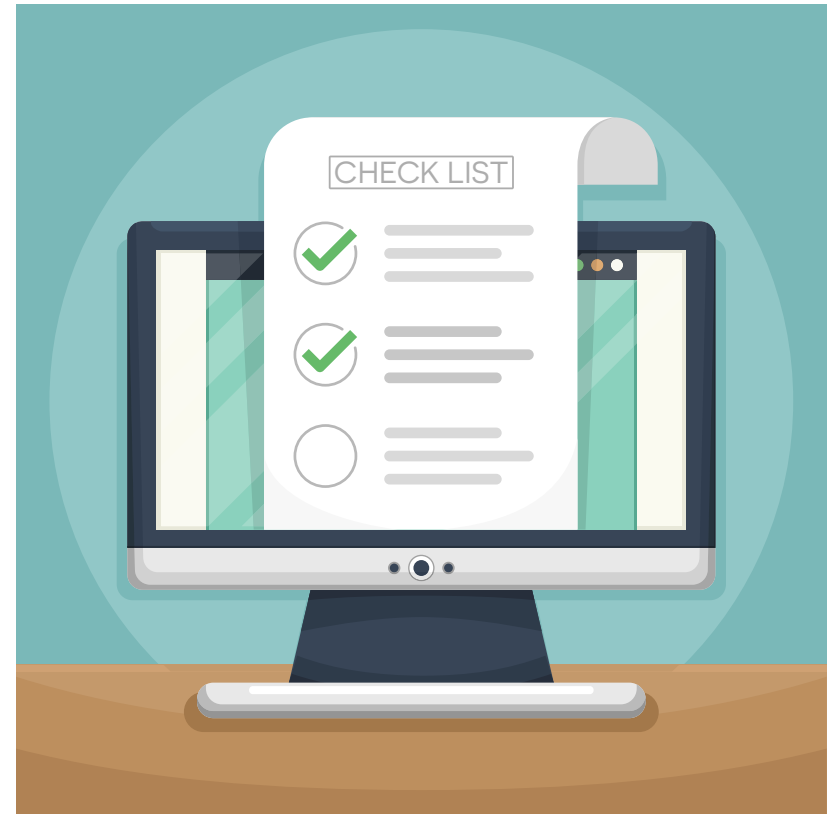
In fact, you can even set up your automated HR onboarding workflow so that it requires certain documents to be present before moving on to the next step. If an I-9 hasn't been submitted to the system, you will be notified so that the missing file can be submitted.

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7. BE PREPARED FOR AN AUDIT

Audits aren't just a threat to accountants. They also can loom over the heads of HR professionals. In fact, benefitspro.com lists I-9 compliance audits as one of the top 5 compliance concerns for HR managers: "The Department of Homeland Security's Immigration and Customs Enforcement has been conducting record numbers of worksite enforcement investigations, criminal prosecutions, audit notices of inspection and administrative fees."

How can HR Document Management software help you in the event of an audit? That's easy. Having all of your documents in one place means that they are organized and ready to be handed over to auditors, without you having to recall banker boxes from offsite storage, or dig through thousands of pages in an on-site file room. With one targeted search, you can recall all the documents you need to provide, without wasting your resources or stressing about what might be missing from your records.

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8. SECURE SENSITIVE DOCUMENTS

HR managers handle all manner of sensitive files, from medical records to pay records, and most of these contain employees' social security numbers and other identifying information that is not intended for public view.

Employees trust you with their private information, and it's important to be responsible with that data. HR Document Management software allows you to configure exactly who can view each type of document, and you can even redact information that should be kept private. With these guardrails in place, you can be sure your HR department is HIPAA compliant.

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SCHEDULE A MEETING

9. BACK UP YOUR DATA

If you're storing all of your records in an on-site file room, what happens if your city falls prey to a natural disaster? Do you have a plan in place for disaster recovery?


Here's how disaster recovery works with an HR Document Management System: You store your electronic documents in the cloud, which means that they're stored at a secure off-site facility. Even if disaster strikes your area, your files and data will be safe. Once your team is able to reach a safe location, they will be able to access those documents from anywhere with an internet connection and resume business as usual.

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10. STANDARDIZE AND AUTOMATE THE APPLICATION AND HIRING PROCESS

If you're a hiring manager, you know how grueling the hiring process can be. The job posting is the easy part. From there, you've got to go through stacks of résumés, forward them to others for secondary reviews, schedule phone and in-person interviews, and more. No matter how urgently you'd like to fill the position, it's difficult to get through all of the steps in a timely manner. It seems like new employees are never hired soon enough.

All of these hurdles are reasons to invest in HR Automation for your onboarding process. Once the hiring process is set up, each step is delivered to your work queue for you to complete. Tedious, repetitive tasks are completed for you, leaving you with the tasks that require a human touch. The best applications can even be automatically routed to others for review. And custom automated emails can be sent to applicants at each step of the process, depending on whether they will be continuing to the next stage or not.
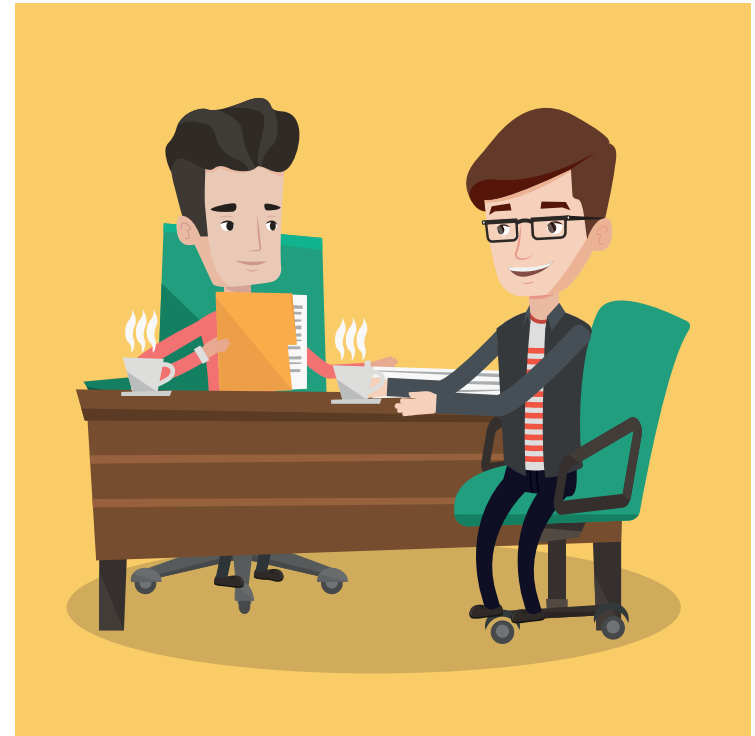
When it comes to HR Process Automation, it's not just a matter of efficiency. There's a lot more involved – compliance, auditability, visibility, security, consistency. To explore with our team how HR Automation can transform your organization on all of these fronts, contact us to schedule a demo and discussion.

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CAN RPA SOLVE YOUR PROBLEM WITH HIGH EMPLOYEE TURNOVER?

The stability of your workforce can be impacted by many things, including stress levels, repetition of tasks, and skill requirements. According to an article on marketwatch.com, the highest turnover rates are in stressful and underpaid jobs. Not surprising, right?

While there's more involved in the big picture, it's a known fact that certain industries have a higher turnover rate. For example, the repetitious nature and low pay associated with fast-food jobs gives quick-service restaurants the highest turnover rate of all. A similar scenario brings retail jobs in at 2nd place on the list. Other jobs with a recipe for burnout and a high turnover rate include meter reading, nursing, and childcare.

In jobs where there is a revolving door and nearly the entire staff is replaced on an annual basis, Robotic Process Automation tools may hold the key to reducing the high turnover rate. Not only can RPA tools help you manage the documentation involved in the application and hiring processes, but RPA can also assist with some of the menial tasks that have workers heading for the door.

Here are the top ways that HR Document Management and HR Process Automation can help managers reduce turnover and efficiently onboard new staff.

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CAN RPA SOLVE YOUR PROBLEM WITH HIGH EMPLOYEE TURNOVER?

PERSONNEL RECORD STORAGE

A foundational tool that comes with any Robotic Process Automation platform is Document Management software. When a company is experiencing a high turnover rate, they produce a lot of paper. This can lead to high costs for storage, as well as time wasted filing applications, new hire paperwork, terminations, and more. Having HR Document Management software can make a huge difference because documents can be automatically "read" by an OCR tool and filed in the system electronically according to key data on each document.

Goodwill Industries saved $100,000/year switching to HR Document Management software

VIEW THE CASE STUDY

For example, **Goodwill Industries** of Middle Tennessee has a turnover rate of 35%, meaning that more than a third of their workforce is replace annually. Before implementing HR Process Automation, Goodwill was juggling a surplus of paper and engaging in time-consuming, paper-based processes. After they switched from a paper-based system to HR Document Management software, this non-profit company found that they'd reduced time spent on paperwork by 25%, and they were saving about $100,000 per year.

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CAN RPA SOLVE YOUR PROBLEM WITH HIGH EMPLOYEE TURNOVER?

HIRING WORKFLOWS

Gone are the days of manual hiring processes. Nowadays, job postings are found online, and prospective employees fill out applications that are actually customized electronic forms. From there, a specially designed processes dictates who will receive the application and what the next steps will be. HR Process Automation cuts down on the stacks of paper applications and résumés waiting for a hiring manager's review.

Further, when a person is hired, a workflow can be depended upon to make sure that person has all the information he or she needs, and also that the company has received all of the required documentation from him or her, including I-9 forms, W-4s, direct deposit forms, and more. The use of electronic documents in the hiring process can help eliminate data inconsistencies, and save time and money.

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CAN RPA SOLVE YOUR PROBLEM WITH HIGH EMPLOYEE TURNOVER?

TRAINING CONSISTENCY AND AUDITABILITY

Once the hiring process is complete and a new employee is onboarded, he or she will have to go through on-the-job training. You might be wondering how something as human-centered as training could possibly be automated. Don't think about it in terms of the delivery of actual one-on-one training. Human interaction cannot and should not be automated. What can be aided by Robotic Process Automation tools is the actual large-scale process. Imagine that a new hire, based on her department, has to go through general company training as well as 6 different sessions for her 3 major job duties. A specific workflow can be created that will prompt her at each new stage of her training. Further, as she completes each session, she can mark it as complete, creating an audit trail for her training.

Or consider industries where employees have to be certified and complete steps each year to maintain their certification. If a nurse in your state is required to complete 30 hours of continuing education each year in order to maintain his certification, RPA tools can assist by sending reminders and other notifications, and the Document Management component can store proof of the completion of the continuing education courses. This also allows employees to take initiative when it comes to their own training and certifications.

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CAN RPA SOLVE YOUR PROBLEM WITH HIGH EMPLOYEE TURNOVER?

THE MOST REPETITIVE TASKS, AUTOMATED

Repetitive tasks can lead to higher turnover. Imagine the person who tears your ticket stub at the movie theater, or the person who checks parking meters all day. These repetitive (and solitary) tasks quickly lead to burnout. Unfortunately, not all of them can be automated, but some can.

Perhaps it will surprise you that accountant made the list of jobs with the highest turnover. Mountains of paperwork and hours spent on data entry each day can crush an employee's morale. This is especially disheartening when you consider that these tasks can be automated! Accounting Automation can make all of the difference when it comes to automating transactions and approval rules, syncing data, and automatically filing documents. Plus, with everything stored electronically, you can be audit-ready instead of dreading the possibility of being audited.
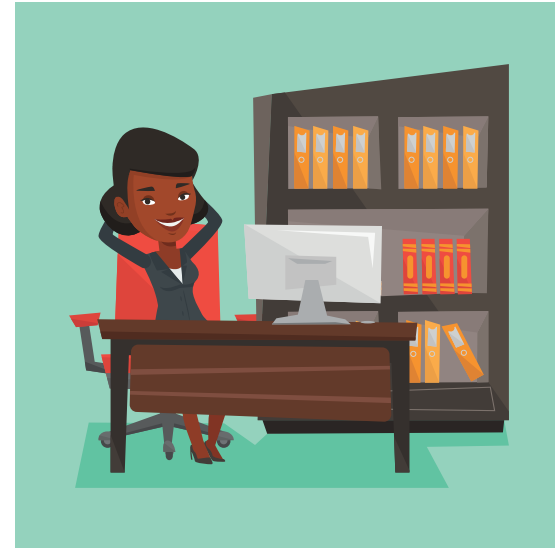
If you're in an industry with high turnover, consider how HR Process Automation can help you manage the turnover rate while also reducing the weight of some of the tasks that lead to burnout. Get your new team members onboarded quickly and easily, and allow them to focus on high-value work that will give them a greater sense of accomplishment. To learn more about HR Automation, click here to sign up for a demo and discussion with one of our business consultants.

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5 REASONS YOUR BUSINESS NEEDS DOCUMENT MANAGEMENT BEYOND SHAREPOINT

No matter the industry, every business has documents that need to be filed away somewhere so that they can be easily accessed later – whether those files are invoices, personnel records, patient records, or legal documents. But how should they be stored? As paper copies in filing cabinets or at an offsite storage facility? And if a company decides to go paperless, this brings up more questions, like whether the electronic documents should be saved in a file share or a DMS (Document Management System). There are a lot of options to consider.

Faced with this decision, many businesses opt to use SharePoint for their document storage needs. But is it really the best choice? Is it better than using a paper system or a file share? And how does it stack up against a full-fledged Document Management System? These are all great questions to ask! In this article, we're going to answer some of them and clue you in on some reasons why you might want to explore a Document Management System beyond SharePoint.

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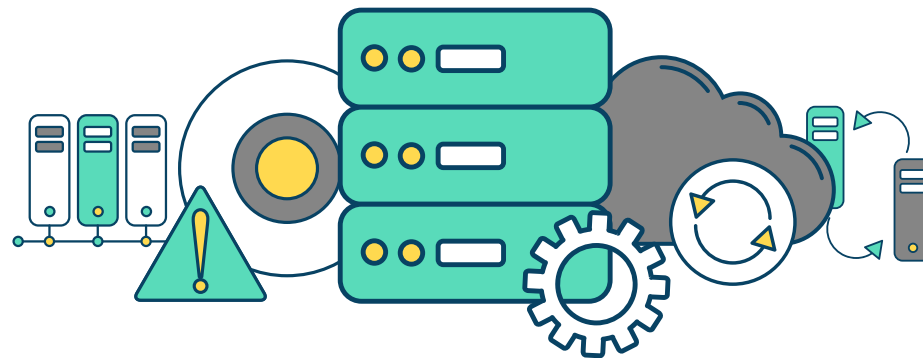
5 REASONS YOUR BUSINESS NEEDS DM BEYOND SHAREPOINT

1. PROCESS IMPROVEMENT EXPERTISE

One of the benefits that comes along with selecting a Document Management solution is business process consulting. When you select a software vendor, one of the first steps they will take is examining your processes and determining how they can best be adapted to the Document Management System, which may also include a workflow solution. This is a great opportunity for your business processes to undergo a facelift. After all, if we're honest about our business processes, we can all admit that they're not always the best way to do things.

When you decide to use SharePoint as a file storage system, you miss out on this very important piece. Generally, processes stay the same as they've always been. It takes just as long to complete your tasks, and work remains just as needlessly tedious as ever. Your business misses the opportunity to have fresh life breathed into its dated processes.

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5 REASONS YOUR BUSINESS NEEDS DM BEYOND SHAREPOINT

2. LIMITS

SharePoint puts a critical limitation on file storage. For any folder you create, you can only store 5,000 documents within it. This means that the organizational structure you set up may work just fine in the beginning, but it can quickly become inadequate, forcing you to make adjustments and create a series of subfolders to accommodate all of your documentation.

Compare this to a scalable Document Management System, which is built to support your company's growth. In fact, DocuPhase allows large-scale organizations to store their files on multiple servers if their volume is high enough to warrant it. Regardless of where the documents are stored, they are still all available through one centralized browser-based repository.

Don't allow this limitation within SharePoint to rob your business of a well-organized, scalable file storage system.

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3. ADMINISTRATIVE REQUIREMENTS

If your company is going to use SharePoint, you will need an internal expert – someone who will take the time to learn how to create everything you will need and to maintain the system. In fact, companies that use SharePoint generally have a full time SharePoint administrator on staff. It is a labor-intensive system to use, and it's easy for things to become disorganized.
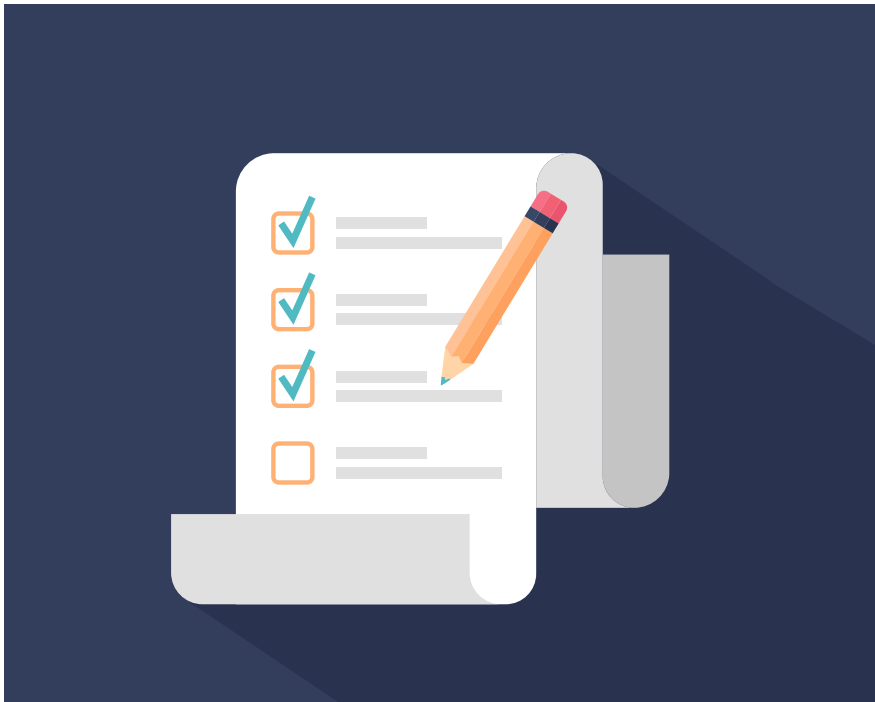
Alternatively, a Document Management solution can be set up for you by the software vendor – someone with experience and expertise. While you will want to have someone on your staff who is cross-trained and can do some basic troubleshooting, the bulk of the support will be handled through your maintenance contract. If something breaks, the vendor can fix it for you. If changes need to be made, you will have the option of hiring the software vendor for consultation and to make technical adjustments.

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5 REASONS YOUR BUSINESS NEEDS DM BEYOND SHAREPOINT

4. DUPLICATION & VERSION CONTROL

In some ways, SharePoint is a good platform for collaboration with your team. Surely, it can offer more than a traditional file share. Still, it falls short of what a Document Management System can offer. Document Management software should include a revision control feature, which allows users to check out a document, make edits to it, and then check it back in as a new version (or revision). Further, users should have the option to view previous versions and to promote previous revisions when appropriate.

When you don't have this kind of functionality, you can end up with duplicate documents, and you can also find yourself spinning your wheels, doing the same work someone else has already done. Again, the organization you will get with SharePoint is not as robust as that of a Document Management System. The lack of version control serves as only one example of this fact.

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5 REASONS YOUR BUSINESS NEEDS DM BEYOND SHAREPOINT

5. PEOPLE DON'T LIKE IT

In business, as in life, resistance to change is par for the course. While some people are excited for new opportunities, others loathe being forced to adjust to new standards and expectations. When a manager makes a decision about file storage, the bottom line is a very important consideration, but so is the solution's level of adoptability.

A quick internet search will reveal that many SharePoint users simply do not like it. In fact, there are some surprisingly profane hashtags on Twitter that express this distaste. And when users don't like something… they quickly cease to be users, choosing instead to store their files as paper copies or within the file shares they were accustomed to.
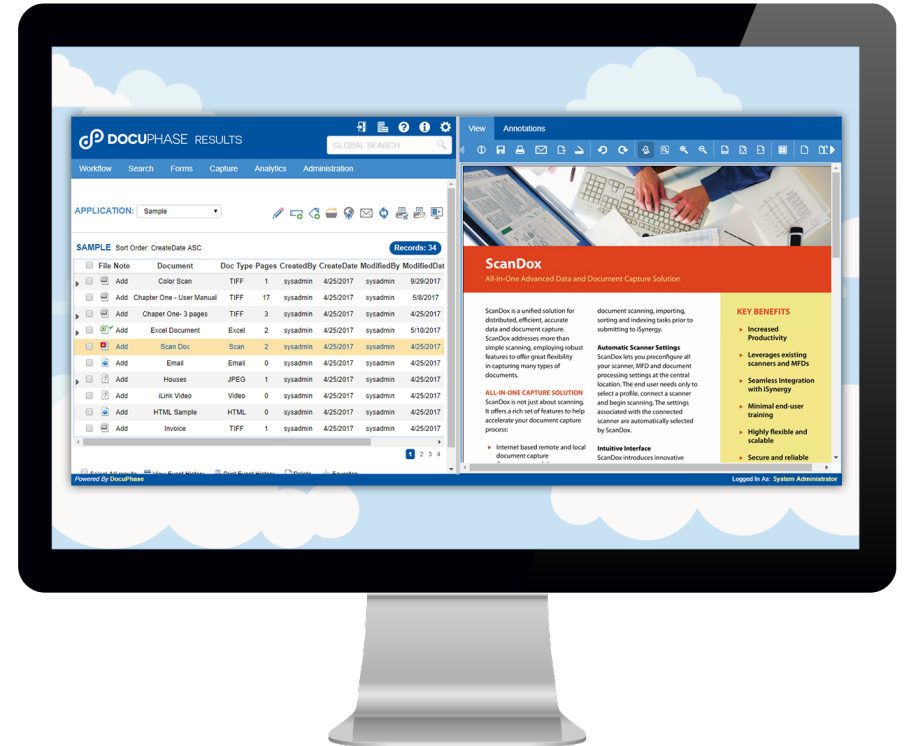
On the other hand, a business manager that chooses a Document Management solution with a sleek, intuitive interface can expect that his or her team will be more amenable to the change. Before choosing a document storage option, a business leader should check out the interface his or her team will be working within and determine how adoptable it is.

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5 REASONS YOUR BUSINESS NEEDS DM BEYOND SHAREPOINT

SELECTING THE BEST OPTION

Once your business has done an honest assessment of what it needs from a document storage solution, hopefully you'll be in a good place to choose the best option. For many companies, a Document Management System can make files easier to manage and can reduce overall effort, alleviating the strains caused by lost documents, process bottlenecks, and endless email reminders.

## SCHEDULE A CUSTOM DEMO TO LEARN HOW HR AUTOMATION CAN HELP YOUR ORGANIZATION

SCHEDULE A MEETING

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WHY ENTERPRISE AUTOMATION = THE END OF SPREADSHEETS

Not only is working in static spreadsheet documents outdated, it's plain inefficient. It'd be like stirring cake batter by hand, rather than using a mixer. A better way to work is right in front of you – are you ready to embrace it?

THE ISSUE WITH SPREADSHEETS

So, without going off the handle immediately, understand that not all spreadsheets are bad. Some are effectively used for family budgets or schedules. Even with innovations in Google Sheets, which updates automatically, these innovations only eliminate some of the doom and gloom. They do not, however, alleviate all the challenges that come with spreadsheet errors and back-and-forth communication.

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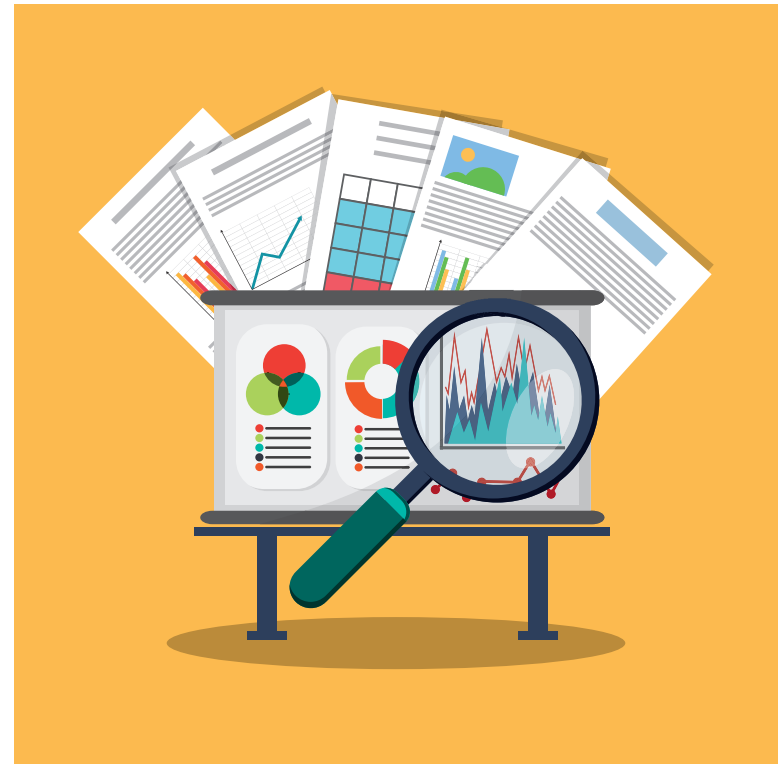
WHY ENTERPRISE AUTOMATION = THE END OF SPREADSHEETS

Between sales, manufacturing, and even healthcare, imagine the repercussions of a spreadsheet being emailed to and from different workers. With security breaches happening left and right, you definitely don't want to trust your business's security to an Excel sheet.

Did you know that up to 88% of spreadsheets contain errors, according to Market Watch? Those errors can translate into costly mistakes and miscalculations, especially if there are hundreds or even thousands of cells. In this case, human error cannot be overlooked.

Often, the issue lies in the fact that there aren't enough internal reviews and checks in place to monitor possible errors; it's just taken for granted that everything's been inputted correctly.

Also, spreadsheets don't analyze data – a spreadsheet is simply a place for you to data dump information. You have to make the insights and determinations yourself. You have to manually add in new data and information.

Cue the headaches and annoyance. You don't need that in your life.

Are you ready for automation? Schedule a meeting with one of our automation experts to see if an **Enterprise Automation Platform** is right for you!

SCHEDULE A MEETING

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WHY ENTERPRISE AUTOMATION = THE END OF SPREADSHEETS

WHY ENTERPRISE AUTOMATION?

Think of Enterprise Automation as that new friend that has her s@%$ together. She's more agile, more auditable, and, best of all, more efficient. Leveraging Business Process Workflow Automation means your business has more opportunities for getting things done and less for opportunities for human error.

It's largely considered the next level of IT, where basic processes and tasks are automatically routed based on your business's workflows – all while maintaining security and compliance.

For example, let's take an invoice. That invoice in Accounts Payable comes from the customer and is sent to an account administrator. From there, it must be indexed and routed to the proper person, and the recipient needs to be notified of said invoice in order for it to be approved and adjusted into the business's financials. Rather than doing all of this manually, with Enterprise Automation, you can create this workflow with the necessary people involved, and they're pinged through the system once the invoice is ready for them to look at/approve/etc.

Alimera Sciences was able to reduce invoice processing time by 93% with DocuPhase's Enterprise Automation Platform.

"Our AP Clerk has found that the program itself has been somewhat of a God-send in the fact that it's lessened her workload tremendously. We're now able to look at other areas and processes and see where we could benefit." - Phil Jones, VP of Finance

READ THE CASE STUDY HERE

93% REDUCTION IN INVOICE PROCESSING TIME

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WHY ENTERPRISE AUTOMATION = THE END OF SPREADSHEETS

In most cases, Enterprise Automation has a variety of benefits, including:

- Integration with your existing systems, so there's no need to overhaul what you have or backtrack
- Quick ramp-up and implementation
- Highly customizable features for convenience, efficiency, and high adoption rate
- Ensured security and compliance with encryption
- Helping usher in a uniform workflow system for every task
- Eliminating the need for added human resources
- Advanced analytics for increased visibility into operations

THE FUTURE LOOKS BRIGHT

Technology is continuing to innovate and transform the way we do business. It's ultimately up to you whether or not you want to join in, increase efficiency and boost your workforce's happiness. Either way, trusting your valuable company data to a spreadsheet could very well lead to a costly error or mistake that takes months, or even years, to reverse.

You can mitigate human error with Enterprise Automation, and get all your tasks routed to the right place without the guesswork or pointing the finger. With some upfront planning and foresight, you can craft a customized business solution that works best with your industry and workforce.

It's a no brainer that we're going into a world where we need to be more efficient and productive than ever before. If you'd like to learn more about how Enterprise Automation can solve your specific business needs, we invite you to download this free resource: What is Robotic Process Automation?

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DISASTER RECOVERY: HOW A DOCUMENT MANAGEMENT SYSTEM CAN HELP YOUR BUSINESS SURVIVE A NATURAL DISASTER

How likely is it that your business will experience a natural disaster, and if you do, how likely are you to recover? According to NFIB, 30% of small businesses will experience a natural disaster at some point. What comes next is even more frightening: Of the businesses that experience major data loss, 70% of them are out of business within a year!

What does this mean for your small (or large) business? It means that you've got to have a plan in place, so that you'll be ready if disaster strikes!

Imagine the worst case scenario. Depending on where you live, you might be imagining a hurricane, a tornado, a wild fire, or another unexpected disaster.

Despite our hurricane shutters and best intentions, sometimes the infrastructure of our city block fails. What then? Does your business have a plan for recovering data and documents? Will you be able to keep your business processes cranking, even if from a remote location?

These are all questions that must be considered. Luckily, a Document Management System can help you address all of these concerns.

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# DISASTER RECOVERY: HOW DM CAN HELP YOUR BUSINESS SURVIVE

WHAT IS DISASTER RECOVERY?

Simply put, disaster recovery is "the ability of an infrastructure to restart operations after a disaster."

This involves:

- Preventing the loss of data and documents
- Resuming typical business operations as soon as possible

There are some simple ways to prepare your business for the unexpected, all of which can be provided by a Document Management and Workflow Automation Platform. What's the key to getting back on your feet ASAP? It's a combination of these three things: having a backup plan, automating your workflows, and enabling mobile access.
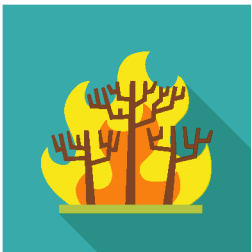
HAVING A BACKUP PLAN

You've seen the stats. Almost 1/3 of small businesses will experience a natural disaster! You've got to have some kind of a backup plan. And when we say "backup," we mean, you've got to back up your documents and data. This doesn't mean manually making copies of each page in your file room and storing them all in a second offsite file room. No, it means keeping digital copies of your documents and data, so they won't be lost, even if your physical office building is damaged.

How does this actually work? It's pretty simple. You'll store your electronic documents in the cloud, which means they'll be hosted at a secure facility. Even if disaster strikes your area, your documents will be safe. The alternative is hosting the documents on your own server, locally, while keeping backups of the data at a remote facility. Either way, your data and documents will be protected from the elements, should disaster strike.

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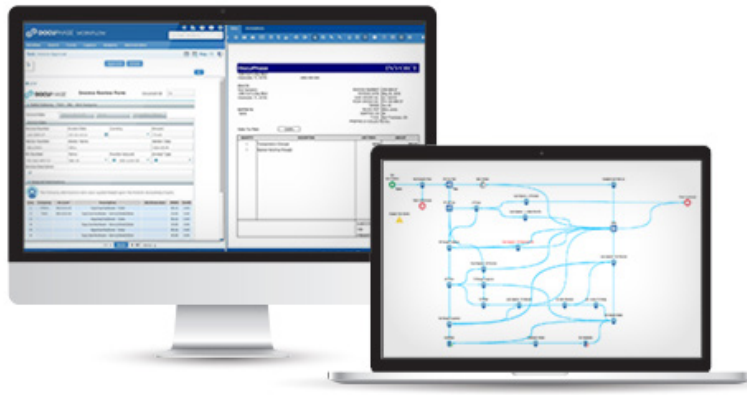# DISASTER RECOVERY: HOW DM CAN HELP YOUR BUSINESS SURVIVE

AUTOMATING YOUR WORKFLOWS

Workflow Automation can help you keep your processes moving, even if your staff has to evacuate temporarily. That's because many of the steps in your processes can be automated. Software robots don't take vacations, and they don't evacuate. They keep on humming along, no matter what's going on in your city.

As for tasks that can't be automated, they'll be waiting in your team's work queues when they return to work. No processes get abandoned. No loose ends are left dangling. Everything gets done, even if there are some unavoidable delays.

ENABLING MOBILE ACCESS

In the best case scenario, your team is able to relocate to a safe area with an internet connection. It's a good idea to designate this location beforehand, as part of your disaster recovery plan. Once your team is safe and sound, this is when a Workflow Automation and Document Management System work to help your team continue to conduct business as usual. You see, even if your team isn't at work – even if they're out of the city, or out of the state – they'll be able to access the data, documents, and other work items that they need, all online. Mobile access will allow your staff to keep business processes moving from a safe, secure location.

Use a Workflow Automation platform to keep your processes moving.

LEARN MORE

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DISASTER RECOVERY: HOW DM CAN HELP YOUR BUSINESS SURVIVE

It's always a good decision to be prepared for the unexpected.

If your business has these three bases covered, you're more likely to be one of the 30% of business that survive the first year after a natural disaster strikes.

LEARN HOW HR AUTOMATION CAN HELP YOUR ORGANIZATION

With HR Automation, you can reduce costs and increase productivity – all without increasing the number of employees. That's because those annoying paper-pushing tasks such as onboarding and healthcare can be completed and routed quicker and more efficiently with automation.

SCHEDULE A MEETING

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Your Platform for Healthcare Automation

Document Management
Go paperless and increase efficiency with Document Management software

Web Forms
Collect information externally and connect your company internally

BPM Workflow
Take control of your business processes with Workflow Automation software

Data Capture
Efficiently and easily convert the data needed to power your business processes

System Integration
Integrate with your existing systems to keep your data accurate and up to date

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