GLOBAL UTILITIES COMPANY TRANSFORMS HR MANAGEMENT WITH DOCUFLOW FOR SUCCESSFACTORS

OVERVIEW

A global utility with a unique business model of acquiring power generation companies around the world, this organization continues their journey to transform and streamline its global Human Resources (HR) with VersaFile's docuflow for SuccessFactors.

The outcomes were streamlined HR processes that boosted efficiency while reducing compliance risk across recruiting, onboarding, employee lifecycle management, performance tracking, and learning initiatives.

Navigating Challenges and Paper Piles: Unraveling the HR Document Chaos

With thousands of employees spanning multiple continents, the client encountered a pressing challenge of inconsistent HR document management across its global operations.

Using SAP SuccessFactors as their global HR system, HR Business Partners across different companies and locations were using various methods ranging from paper files and local file shares to storing documents in the SuccessFactor's database. This decentralized approach led to inefficiencies, inconsistent processes, scattered content, and compliance concerns.

Bridging the Gap: The Vision to Complete the Transformation

Committed to optimizing operations and fostering innovation, the client recognized the critical need for a comprehensive HR document management solution.

Utilities being a heavily regulated industry, the strong compliance and adherence to global standards was non-negotiable. They envisioned a unified system that would integrate with SuccessFactors, automate manual processes, ensure compliance, simplify document management, and enrich user experiences.

The client aimed to empower employees, business managers, and HR business partners with easy access to authorized documents while adhering to strict data privacy and protection regulations.

After careful consideration, they chose a cloud-based Content Management platform to globally centralize the secure storage and retrieval of their HR documents.

What remained was a way to integrate this ECM system with SuccessFactors so manual file tasks and processes could be automated to save HR Business Partner time.

The Perfect Fit: Turning Chaos into Order

In their search, the client found VersaFile's docuflow, a software platform for large organizations running SAP SuccessFactors that fully integrates with various ECM platforms as a central repository for employee files.

Through strategic collaboration and the integrated no-code low-code docuflow solution offered by VersaFile, the client achieved their vision:

⊘ CENTRALIZED DOCUMENT MANAGEMENT

All documents are uploaded, reviewed, and approved in SuccessFactors but get automatically stored and archived in the ECM platform, creating a centralized repository. This eliminated the scattered content, streamlining the process and saving valuable time.

⊘ ROLE-BASED PERMISSIONS

Leveraged SuccessFactors' Role-Based Permissions to ensure appropriate access to documents, enhancing data security.

⊘ UNIFIED ACCESS

The "My Documents" application from docuflow enabled employees to access and manage their documents within SuccessFactors. This ensured an efficient user experience with easy access to documents, and less HR requests.

⊘ AUTOMATED TAXONOMY CREATION

At the outset, each employee's folder structure is systematically created in the ECM platform eliminating manual tasks and inconsistencies. This is maintained as new employees are added or shift across divisions and geographies.

⊘ EFFICIENT APPROVAL WORKFLOW

Uploaded documents went through an automated workflow for review and approval before committal in the ECM platform. This ensured that only relevant and approved documents were stored.

⊘ FLEXIBLE SEARCH CAPABILITIES

The "Document Search" application from docuflow provided HR and business managers with flexible search options to locate specific employee documents based on role-based permissions.

STRUCTURED ARCHIVING

Archived documents were replaced in SuccessFactors with the "Link Cards" capability of docuflow, facilitating quick access to files stored in the ECM platform without duplicating storage in SuccessFactors.

COMPLIANCE AND SECURITY

By centralizing documents in the ECM platform, the client ensured better compliance with data protection regulations and the security features enhanced the protection of sensitive documents.

METADATA INTEGRATION

The system automated metadata transfer from SuccessFactors to the files in the ECM platform, reducing the need for manual data entry and ensuring consistent categorization of documents.

CONTENT GOVERNANCE

Termination dates are automatically transferred to the files in the ECM platform when an employee departs the organization, providing systematic, consistent, and auditable retention and disposition of HR records.

Efficiency Redefined:
Optimizing Operations and Enhancing User Experience

Deployed through SAP's Business Technology Platform (BTP), docuflow for SuccessFactors integrates deep into and extends SuccessFactors to modern content management platforms like Box, MicroSoft365, and IBM for centralized HR document management and governance.

ENHANCED USER EXPERIENCE

Empowered employees, business managers, and HR professionals gain streamlined and secure access to relevant documents.

TIME SAVINGS

Document management became more efficient, saving time for HR and employees while enabling self-service, faster approval cycles, and eliminating redundant processes.

CONSISTENT ACCESS

The role-based permissions ensured that users could only access relevant documents, maintaining data security.

ENHANCED SECURITY

Leveraged secure cloud content management platform to safeguard sensitive information and ensure data protection.

COMPLIANCE ASSURANCE

The structured system for secure document storage and streamlined access mitigated the risks associated with non-compliance to global data privacy standards.

HOLISTIC SOLUTION

The implemented applications provided the client with outbound attachment archiving, inbound attachment linking, and task/process automation capabilities.

The Road Ahead

As the client continues their journey toward operational excellence, their next step involves transitioning historical documents into a streamlined system. With a robust solution now in place, and a structured folder system in the cloud-based ECM Platform, the client is migrating historic content to the new structured system, which will then be automatically indexed and linked back to SuccessFactors. This will further enhance document organization, access, and governance.

This success story showcases how seamless integrations and modernization can result in transformative outcomes in complex HR environments.

About Us

docuflow was founded 15 years ago by a team of seasoned SAP & ECM developers. Tired of custom solutions, the team extended docuflow beyond ERP to now integrate content with SuccessFactors.

docuflow for SuccessFactors helps HR Professionals, Business Managers, and Employees save time by providing instant access to documents they are permitted to manage all within SuccessFactors. docuflow also helps the HR business unit save costs by leveraging your existing Content Management systems and since docuflow is no code – low code, you can avoid further costs associated with expensive custom software development & sustainment.

Our promise is outcomes that make a difference and implementations that add value, even if it costs us!

Ready to get started?

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