



# DocSavi™



*Expert Solution for Human Resources Automation*

## Human Resource Challenges

Employee lifecycle management is a core process within any business, large or small. And in most businesses today, managing the various Human Resources transactions remains heavily dependent on exchanging paper documents:

- Job Descriptions, Recruiting, Advertising
- Resumes, References, Applications
- Credential Verification, Background Checks
- Policies, Procedures, Training Materials
- Transfer, Promotion, Layoff, Recall
- Disability, Retirement, Termination
- Performance Evaluation, Disciplinary Action
- Payroll, Compensation and Benefit Updates

Effectively managing and retaining this plethora of content is critical to the long-term success of the firm. The HR team is pressured from many directions to constantly assess their ability to meet legal and HR compliance regulations, including: HIPAA, the Privacy Act, OSHA, FICA, the ADA and other EEO laws.

Human capital, the most critical and valuable business asset is the foundation of a productive and creative workplace, and organizations recognize that they must become increasingly efficient in managing the HR process to improve and maintain competitiveness.

## DocSavi Introduction

Recognizing that document management is a primary bottleneck and source of inefficiency within the HR department, CM Mitchell Consulting offers you a way to streamline your HR processes with our proven DocSavi solution.

DocSavi integrates the Oracle E-Business Suite (EBS), including the Oracle Human Resources Management module, with your Enterprise Content Management (ECM) system. DocSavi provides process efficiency by attaching images of the documentation to the employee record within Oracle EBS.

## DocSavi Human Resources Process

1. The various HR documents and forms are scanned immediately as they are prepared and received within the HR department
2. Using industry leading capture software equipped with Optical Character Recognition (OCR) technology, we configure the capture software to extract key data from the various documents, such as: employee name, employee number, document date, etc.
3. We use the extracted data to query Oracle for matching records. This serves to validate the extracted data. In addition, we can use this data to retrieve additional fields from Oracle for use in indexing within your ECM system. For example, using an extracted and validated employee number, we can retrieve the Oracle division or department coding. That coding can then be passed through to your ECM system and used to search and retrieve documents, as well as to apply the required security policy.
4. The complete set of metadata, extracted from the document and/or retrieved from Oracle, is presented to an operator where they have the ability to apply any required updates before release to the ECM system.
5. DocSavi monitors the create event within the ECM system, and uses the released metadata to attach the image to the corresponding employee record within EBS.
6. The imaged documents are then linked to the EBS record, and can be viewed from within EBS using standard Oracle attachment functionality. Processes for HR staff and authorized line managers are simplified because the relevant employee documentation is linked to, and directly accessible from the employee record.
7. Paper storage costs are eliminated, regularly compliance is ensured, and required audit processes are more efficient. In addition, the full ECM feature set becomes available to manage the HR content (version control, access control, annotation, audit trail, retention policy, etc.).



# DocSavi™

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## Expert Solution for Expense Report Automation

### Value Proposition

*Cut HR document management costs in half...*

- **Process Efficiency:** DocSavi improves the productivity for HR staff and reduces cost by streamlining employee administration. It is no longer necessary for them to leave their desk in search of the physical documents required to complete an HR transaction or respond to a manager or employee inquiry.
- **Data Integrity:** The check and balance between a) the data on the documents, b) the data in Oracle, and c) the data in the ECM system improves accuracy and reduces occurrence of the common errors which create audit findings, compliance risk, and otherwise impact job satisfaction.
- **Storage Costs:** For large corporations, the cost to store and maintain physical employee records can run in to the millions of dollars. Both on-site and off-site storage solutions incur the cost of filing, retrieving and re-filing. The cost of the physical office space alone is enormous in larger markets.
- **Lost and Misfiled Documents:** Industry statistics tell us that, on average: 7% of paper documents are lost, 3% are misfiled, and an average document is replicated 20 within the organization (printed, saved locally, emailed, etc.). These costs and inefficiencies are eliminated by the ECM system with DocSavi linkage to Oracle.
- **Approval Management:** Many HR forms require review and approval by managers outside the HR department. The DocSavi solution creates the ability to manage these processes without routing the physical document. The paper inefficiencies are replaced by the automated workflow and approval routing capabilities provided by Oracle any many popular ECM systems.
- **Regulatory & Legal Issues:** DocSavi enhances regulatory compliance, simplifies audits, reduces audit findings, and reduces

the cost of an inevitable legal discovery exercise. All employee records are protected by the security settings and retention schedule within the ECM system, and are available for viewing by authorized users directly from within Oracle EBS.

### Intuitive for Oracle Users

Leveraging the right tool for the task is important when looking for efficiency gains. DocSavi is designed to utilize the native functionality in Oracle E-Business Suite such as Oracle Approval Manager workflows and attachment functionality.

The intuitive nature of the solution means that users continue to use features they are already familiar with, without having to learn new systems and screens. The image viewing interface allows users to quickly see multiple files at once, and by placing the cursor over a thumbnail, view the entire image on the screen.

### Configurable

Configurable architecture ensures a short implementation time and a quick return on investment. DocSavi is based on standard Oracle interfaces to avoid costly upgrade and supportability issues.

In addition, DocSavi provides a web-based Administrative Console to easily view and maintain the configuration settings.

### CM Mitchell Company Description

C.M. Mitchell Consulting Corporation (CMMC) has provided expert consulting services to Oracle clients since 1992. The company's content management experts have assisted many companies around the world to deploy enterprise capable ECM solutions. CMMC's philosophy is to bring together the best technology, strategy and resources to its client project.

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