

# Five Ways to Unlock Enterprise Productivity with Employee Document Management

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## Why Employee Document Management is vital to the Employee Experience today

Managing employee documents can be a lot of work. Scanning, faxing, and searching for paper or electronic files across multiple systems can be highly cumbersome to an organization’s HR and IT teams, and can be high risk due to potential data and privacy breaches.

Searching for paycheck information from a payroll system, tuition reimbursement forms in a Core HR system, and an employee relocation form in another, results in a fragmented view for your employees and is far from a consumer grade experience. At the same time, businesses are faced with increasing stringency over global and local regulations covering employee data and security.



Our customers asked us to build a solution that would help centralize all of their employee documents in a secure, modern, and efficient way.

Senior Product Management leader, ServiceNow

Name	Topic detail	Topic category	COE	Employee access	Legal hold	Updated
Certificate of U.S. Citizenship	New Hire Documentation	Talent Acquisition	HR Talent Management Case [sn_hr_core_case_talent_management]	true	true	2022-04-14 12:12:45
Corporate Credit Card Request Form	Corporate Credit Card Request	Time and Expense Management	HR Payroll Case [sn_hr_core_case_payroll]	false	false	2018-03-14 14:53:02
Disciplinary Notices & Documents	Disciplinary Actions	Employee Conduct	Employee Relations Case [sn_hr_er_case]	false	true	2022-04-14 12:13:31
Education Agreements	Tuition Reimbursement	Benefits	HR Total Rewards Case [sn_hr_core_case_total_rewards]	false	false	2018-03-14 14:53:02
Employee Information Update Documentation	Profile Update	HR Operations	HR Workforce Administration Case [sn_hr_core_case_workforce_admin]	false	false	2018-03-14 14:53:02
Employee Verifications	Employment Verification	HR Operations	HR Workforce Administration Case [sn_hr_core_case_workforce_admin]	true	false	2021-03-25 01:57:57
Experience Letter	New Hire Documentation	Talent Acquisition	HR Talent Management Case [sn_hr_core_case_talent_management]	true	false	2021-03-12 09:52:52
I-9 Employment Eligibility Verification ...	New Hire Documentation	Talent Acquisition	HR Talent Management Case [sn_hr_core_case_talent_management]	false	false	2021-03-16 13:22:16

### Easier Document Management with HR Service Delivery

In ServiceNow, employee documents are often generated and captured across multiple cases and tasks. Our customers asked for an easier way to centralize these documents and provide a simplified way to retain, secure, and manage employee documents.

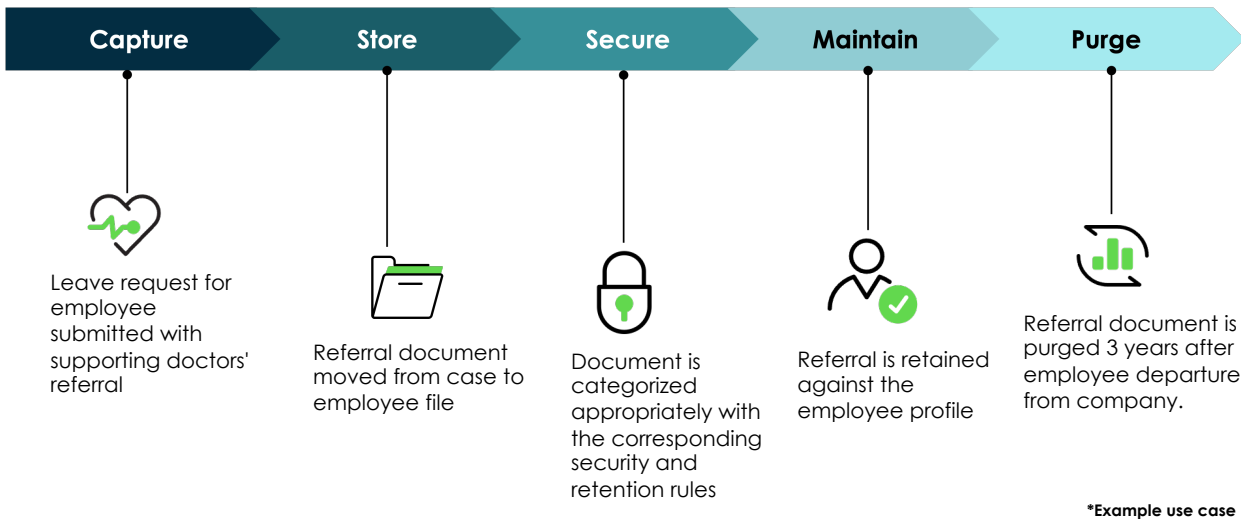
Therefore, ServiceNow launched our Employee Document Management solution in 2018 to provide a secure, paperless, and complete view of all employee documents, from hire to retire, all-in-one place.



# Five ways to unlock enterprise productivity with Employee Document Management

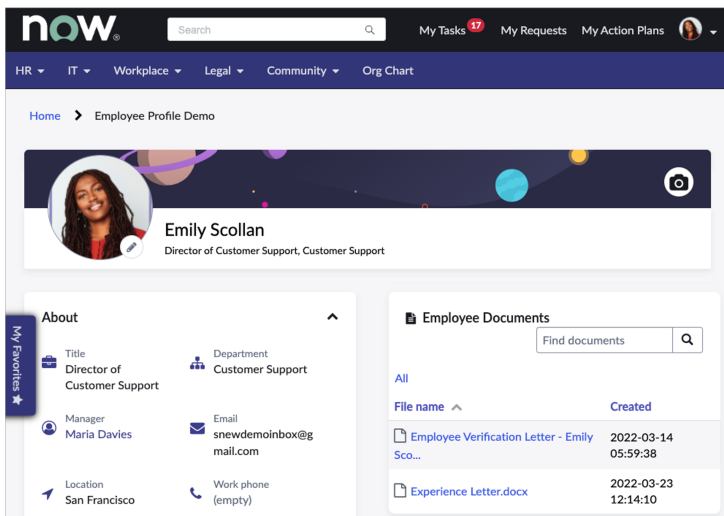
At ServiceNow, we've identified five ways our customers can leverage our Employee Document Management solution, to make it easier for organizations to unlock enterprise productivity.

Here is an example of how a leave form could be managed in our solution today:



## 1. Capture employee documents quickly and easily

There are two simple ways to quickly capture employee documents within a case. HR Agents can choose to manually identify documents from within a case and push them to the employee profile. Alternatively, ServiceNow can automatically move attached documents within a case to the employee profile, based on the nature of the case. By centralizing the retention of documents in the employee profile, organizations can reduce the time and effort required to build custom integrations with third-party enterprise document management solutions.



Organizations with legacy documents retained in another system can utilize the [bulk upload feature released in 2019](#), to quickly import documents from a local file server or from 3<sup>rd</sup> party systems.

## 2. Store documents securely, all-in-one place

By using a central location to manage and store employee documents, organizations have the:

- Ability to move documents automatically from cases to employee file
- Ability to upload documents directly to the employee file (if desired)
- Ability to categorize documents and add additional metadata to make it easier to search for documents
- Gain visibility of an employees entire profile and document history
- Maintain security of employee data
- Purge data where required, in line with compliance requirements

HR Agents have a single view of all documents captured against an employee profile, including visibility of the type of documents, the corresponding case and when it was created. In addition, audit trails provide complete visibility into the history of the document.

## 3. Configure retention and security policies

Global and local jurisdictions have different requirements on the length of time that employee documents must be retained for. Potential breaches of sensitive employee data can often result in legal action, at a high cost to the business. The ability to set retention policies by country, location, and document type using ServiceNow's out-of-the-box capabilities can help protect organizations from significant business risk and avoid potential fines from global regulators.

In more complex cases, a legal hold can be applied to certain types of documents or to employees to ensure that documents that are used in ongoing investigations or legal activities are not purged.

File name	Document type	HR case	Purge hold	Created
<a href="#">EducationAgreement_MaraRineheart_Fall201...</a>	Education Agreements	HRC0001047	Legal Hold	2018-03-15 14:23:42
<a href="#">UniversityInvoice_FallSemester2017_MaraR...</a>	Tuition Receipts	HRC0001047	Legal Hold	2018-03-15 14:27:00
<a href="#">University_Transcripts_MaraRineheart.pdf</a>	Transcripts	HRC0001047	Legal Hold	2018-03-15 14:32:44

**Add legal hold on this profile** ✕

Reason: Litigation

Comments: Adding a legal hold for this employee as per communication received from Kate Darcy from the legal team.

Cancel
OK

#### 4. Maintain documents with integrity and audit controls

Access to employee documents can be defined by role or document type, making it possible for employees to view documents from their own profile or employee service portal.

In addition, ServiceNow provides the ability to audit each employee document from the time the document is created or uploaded in our system to the time it is purged. This enables organizations to track changes made to files and identify when documents have been accessed and by whom.

The screenshot shows the ServiceNow interface for an Employee Document. The form includes fields for Document name, Description, Employee, Document type, Effective date, Purge hold, Payroll country, File size, File format, Created on, and Created by. Below the form is an 'Employee Document Audit Trail' section with a search bar and a table of audit events.

Document	Action	User	Purge hold	Created
Sample Education Agreement - Emily Scollan.pdf	Record Updated	System Administrator		2022-04-14 12:08:25
Sample Education Agreement - Emily Scollan.pdf	Document Uploaded	Harry Taylor		2022-04-14 12:06:18

#### 5. Purge employee data and proactively manage compliance

Purging and deleting documents manually can be a time-consuming activity that may be prone to error. Using ServiceNow, HR administrators can proactively manage compliance by automating the purge and deletion of certain employee data within a set period of time.

#### Additional information on how ServiceNow secures the NOW platform

- ServiceNow Trust and Security [webpage](#).
- View this [e-book](#) to understand how ServiceNow securely manages our customer data