



Construction Document Manager Human Resources

ARCHIVING OF HUMAN RESOURCES DOCUMENTS

Construction Document Manager's Human Resources Application integrates efficiency in many areas. Diminishing the time it takes for document filing, searching, and reviewing are just some of the benefits HR personnel immediately notice when implementing CDM's HR Module. We can't talk about managing HR Documents without looking at securing documents and the quick and easy way to make documents accessible or inaccessible.

GETTING DOCUMENTS INTO CDM HR

Documents are easily brought into the imaging system in a variety of ways; scanning, importing, and drag-and-drop are three of the most common ways. Scanning is as simple as using the photo copier (without the mess of toner and paper jams) and quite often has better readability than the original. Importing and drag-and-drop allow you to take your current electronic files and save them in the HR Database with a click of the mouse.

FILING DOCUMENTS

Document archival using the CDM interface gives users a quick way to store documents using functions such as

Apply the Benefits of CDM to Human Resources:

- Quick Filing using Drag & Drop
- Route Documents
- Robust Searching
- Lookup Fields
- Dropdown Fields
- Dynamic Fields
- E-mail & Export Capability
- Paper Trail of Document's History
- Document Level Security
- Database Functionality

All the above allows for quick archival of HR Documents!

lookup, user defined and dynamic fields. Lookup fields such as Employee #, Employee Name, Department and Status, display the employee information by typing what you already know, their name or their department and clicking a button. A table of corresponding information appears after selecting the appropriate information from the corresponding data list. This eliminates the hassle of keeping up with employee numbers or other information impossible to

Lookup fields allow for integration with 3rd party data files that contain information such as; Employee Number, Employee Name & Status.

memorize and keeping employee information updated. Lookup fields are often "Set it and Forget it" ready, which means – once the integration has been set with your current employee data, keeping it up-to-date is no problem at all because each day it can be refreshed, which keeps your CDM lookup information current. User defined fields are controlled by a button that reveals a list of data values that can only be used for that field. This control reduces variation and ensures that all users are entering the same information for that field. Instead of clicking the control button for a user defined list, users can simply start typing the value in the field and when it finds the match, hitting enter selects & inserts the appropriate value.

The screenshot shows a software window titled "CDM - HR" with a menu bar (File, Edit, Document, Tools, Help) and a toolbar. Below the toolbar are tabs for "Index Info", "Routing Info", and "Search". The main area contains a form with the following fields:

EMPLOYEE NAME	<input type="text"/>
EMPLOYEE #	<input type="text"/>
EMPLOYEE STATUS	<input type="text"/>
DEPARTMENT	<input type="text"/>
DATE OF HIRE	<input type="text"/>
DOCUMENT TYPE	<input type="text"/>
EFFECTIVE DATE	<input type="text"/>

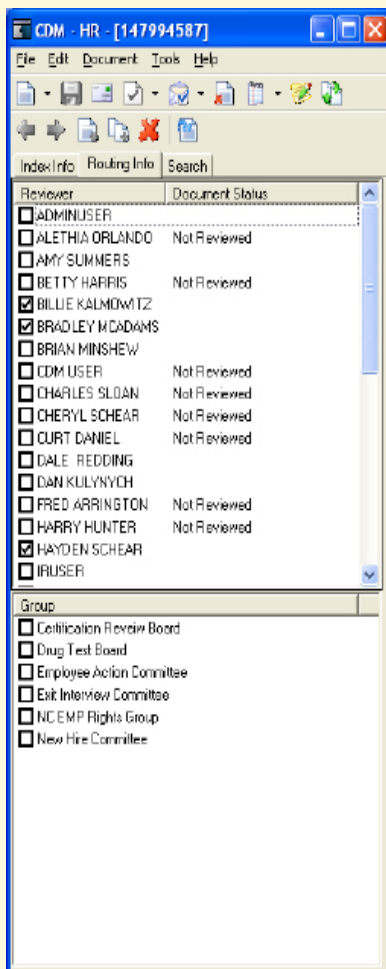
ROUTING DOCUMENTS FOR REVIEW

Not only are documents archived with multiple data values, which greatly reduces misfiling, you also have the ability to route the document for review to individual users or group(s). The "reviewed" status of the document is noted next to each recipient's name – making it simple to see who has reviewed the document. CDM HR users can search on documents that were routed by them or others and check the document's status and review the document for notes or redistribution.

Routing documents for review and monitoring who has reviewed the document is as simple as a mouse click.

SEARCHING FOR HR DOCUMENTS

Searching for documents in filing cabinets or documents that may be lying on your desk can be cumbersome and sometimes exhausting. CDM Document searching is a huge benefit with



for documents, such as documents that need to be reviewed, signed or simply distributed outside of the company. Dynamic

values searching allows you to search by data fields that are specific to a certain document type. Selecting the document type from the dropdown list will display the field's specific for that document, i.e. Selecting the document type "Application"

Benefits of Database Searching:

- Finding common documents thru one or more data values
- Wildcard Searching
- List of Values Searching
- Search Expressions
- Exporting a Search Result Set to Excel

would display the following fields: "Applicant Name" and "Position #". Users also have the option to save a search, saved searches can save you time if you search for the same document frequently. When saving a search you have the option of sharing it with others in the HR Group or making it private.

SECURING SENSITIVE DOCUMENTS

Many, if not all, Human Resources documents are sensitive and should be secure from the majority of imaging users. Application and document level security can be applied and easily managed, allowing accessibility and inaccessibility to documents archived in the HR Application. Another layer of security gives those who can access the documents restricted privileges for printing, exporting or e-mailing archived documents.

