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CU I&E Submission: Using OnBase Workflow to Automate HR Documentation Collection [1]

Submission Highlights

Team Information

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What

As a part of the implementation of the OnBase document management system in the UCCS HR Office, I developed an integrated checklisting workflow to assist in the collection of required new hire documentation. This workflow uses custom built logic and runs timers to check the system for documents and actions in order to determine what is still missing from an employee file, or if the new employee is ready to be entered into HCM. Once the employee is hired, the workflow automatically indexes documents into the personnel file and sends a welcome email to the new employee. This tool eliminated a paper-based filing cabinet system in which required documentation was collected by hand and then checked manually, one file at a time, multiple times per day. The new process automatically places the file in a queue for data entry as soon as all required documents have been received. This means that new employees are entered into the system quicker, allowing earlier access to electronic resources, less stress for the hiring department and better customer service.

Why

Electronic records eliminated stacks of paper, but for new hire documentation, there was not a process to allow required documents to be collected electronically. This documentation was collected in hard copy with a paper checklist which was manually updated. During times with a large volume, it was difficult to know when a file was complete without checking each and every file multiple times per day. The workflow allows for the collection and storage of this hiring documentation and uses automated logic to identify missing documents or complete files in order to more quickly hire and on-board new employees.

When

The workflow process went live in July of 2019.

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Links

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