

Electronic HR files & processes

Doxis Human Resource Management



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The digital HR file was the first step in our company's digitalization strategy.

It gives us an efficient process structure so that we can save on time and costs in HR management.

Nina Orywal, HR Manager, HANSA-FLEX

Strategic tasks

Fast & secure HR processes –
the basis for efficient HR management

Finding – and, most importantly, keeping and nurturing – dedicated, skilled employees is fundamental to the success of your business. HR departments do so much more than manage countless documents: They are the first point of contact for employees and management and provide a wide range of services pertaining to HR topics: from recruiting and skills management to training, on and offboarding, and including fielding questions about billing, payroll, contracts and insurance. With Doxis you can be assured that you have all information at hand and can accelerate HR processes: In the HR

eFile you will find all employee information filed in a structured, centralized way and be rest assured that sensitive information is protected.

At the same time the HR eFile is the starting point for the efficient management of all HR processes: With automated workflows, you can work quickly and maintain an overview – also across departments, and thereby reduce manual effort. By making daily work easier, you have more time to concentrate on recruiting, personnel development and employee retention.



Your benefits at a glance

- Centrally manage HR documents & data anywhere in a structured way
- Uniform & quick HR processes with a seamless user experience
- Overview of all employee information, workflows & deadlines
- Less manual effort, more time for strategic tasks
- Protected personal data & documents & audit-proof archiving
- Better communication between locations & departments

Secure & efficient HR management as a strategic task

HR processes go far beyond the HR department: Departments need to be in the loop of applicant processes and further training, the legal team must help with contracts, IT and procurement assist with onboarding, external trainers support professional development, etc. Only when processes within and outside of the HR department are totally integrated and all information is readily available is HR management successful and efficient. And it's about so much more than the optimization of administrative tasks. Digitalization in HR creates the foundation for recruiting qualified personnel, nurturing and growing their skill sets, and therefore ensuring the success of the entire company.

What holds HR staff back from focusing on value-added work such as recruiting and employee development are time-consuming administrative tasks: filing, searching, forwarding, compliantly archiving documents – these tasks slow down daily work and, when lacking the right digital tools, can lead to mistakes. The digitalization of HR files and processes offers great potential.

3 things that an HR eFile should offer

More efficient HR processes

through structured
document management and
automated workflows

Compliance with legal requirements

such as data protection,
audit-proof archiving and
legal retention periods

Time for strategic tasks

such as recruiting and
employee development
thanks to fewer manual tasks

Best practice solution

Doxis HR eFile

The Doxis HR eFile is the basis for modern HR management. Whether your information arrives through letter, email, HR system or online portal, you can file all information centrally and in a structured manner for each employee. It doesn't matter if you are in the office, working from home or on the go: You can immediately access the right information and digitally manage all of your HR processes – without putting data protection at risk.

Get a running start in HR

The Doxis HR eFile solution is based on many years of project experience with HR departments in a wide range of industries. You'll find all of the functions you need most in your daily work, all of which helps you to work more productively and expedite HR workflows.

Preconfigured functions of the Doxis HR eFile

- Preconfigured folder structure for filing common HR document types
- Comprehensive search functions
- Integrate with SAP and other HR systems
- Extensive access and deletion management functions
- Secure archiving of documents subject to retention
- Automated workflows for document releases, reminders, granting personnel file access, applicant management and much more
- Automatic deadline and date monitoring



Good reasons for Doxis

01

Digitally manage HR documents

Digitally and centrally manage all HR-related documents (contracts, references, correspondence, insurance policies, etc.).

02

Maintain an overview

Systematically and consistently file all employee and applicant documents and retrieve them quickly at any time.

03

Be ready to provide information

Have all the information you need for applicants, employees, management and external partners (e.g. insurers) at your fingertips.

04

Securely store sensitive information

Doxis ermittelt anhand von Genehmigungsprofilen, welche Person eine Rechnung genehmigen kann bzw. ob diese an weitere autorisierte Personen weiterzuleiten ist.

05

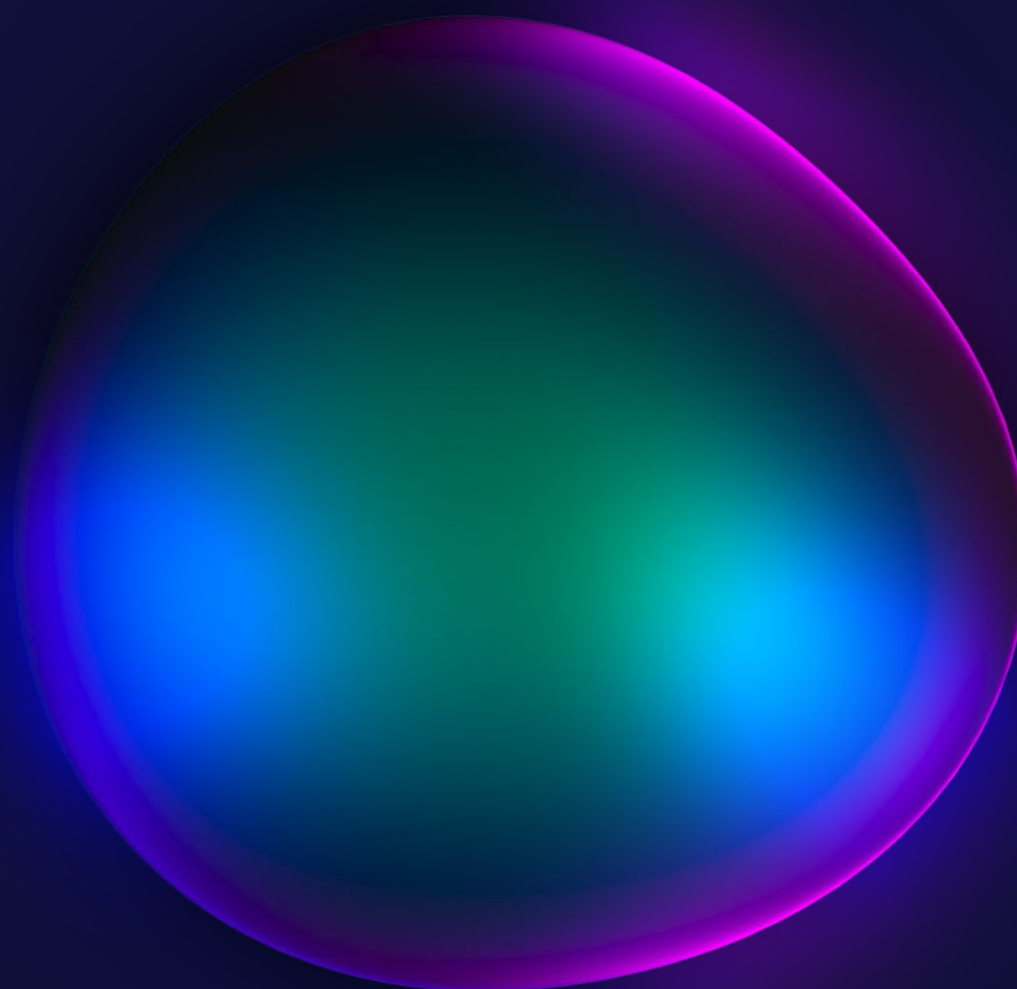
Automate workflows

Automatically manage routine tasks like creating new personnel files, requests to view personnel files, drafting references and contracts, etc.

06

Meet deadlines easier

For example, get automatic reminders to review applicant documents and expiring qualifications, extend employment contracts, etc.



Integrate HR applications

Securely integrate documents and data from HR systems (e.g. SAP), Microsoft Office applications and employee and applicant portals.

07

Make collaboration easier

Share and work on employee and applicant information regardless of location or language while also integrating external experts or partners into workflows.

08

Work remotely

Access documents, files and workflows from anywhere, e.g. during employee meetings at any location or while working remotely.

09

Streamline administration

With preconfigured functions, client-oriented data management & user admin functions.

10

Ensure traceability

Monitor open and closed activities and always know who is responsible.

11

Improve employee development

Keep track of employees' development, from application to skills management and employee evaluation, and initiate professional development measures, contract amendments etc. in good time.

12

The HR eFile

Centralized, structured, standardized

If you have to deal not only with current and former employees, but also hundreds or even thousands of applicants, keeping track of all HR documents can quickly get very challenging – especially when you require personnel files at different locations. With the Doxis HR eFile, you manage all HR information across all sites. Whether you receive documents via mail, email or your online portal, you transparently store applicant documents, employment contracts, insurance paperwork and much more in digital files and save space besides. Preconfigured folder structures help you file all documents to the right location – so everyone on the HR team knows exactly where to look, whichever file they access.

Searching for a new employee? You can find and manage their documents also with Doxis. Once the new employee is hired, Doxis adds the application documents of the person to their eFile. This helps you to maintain a complete overview of their career to date. A digital cover sheet displays the most important information contained within the eFile at a glance, including the employee's photo, name, personnel number, personal data and contract details. Jump from the file directly to your HR and payroll system quickly and easily at any time.

It's a huge help not having to run to the filing cabinet every time we need an HR document. Now, we access them digitally, directly from our workstations.

Ralf Hilgenberg, HR Department, Westphalia Group

Automatic synchronization with your HR system, e.g. SAP

Know exactly where to look thanks to the uniform folder structure

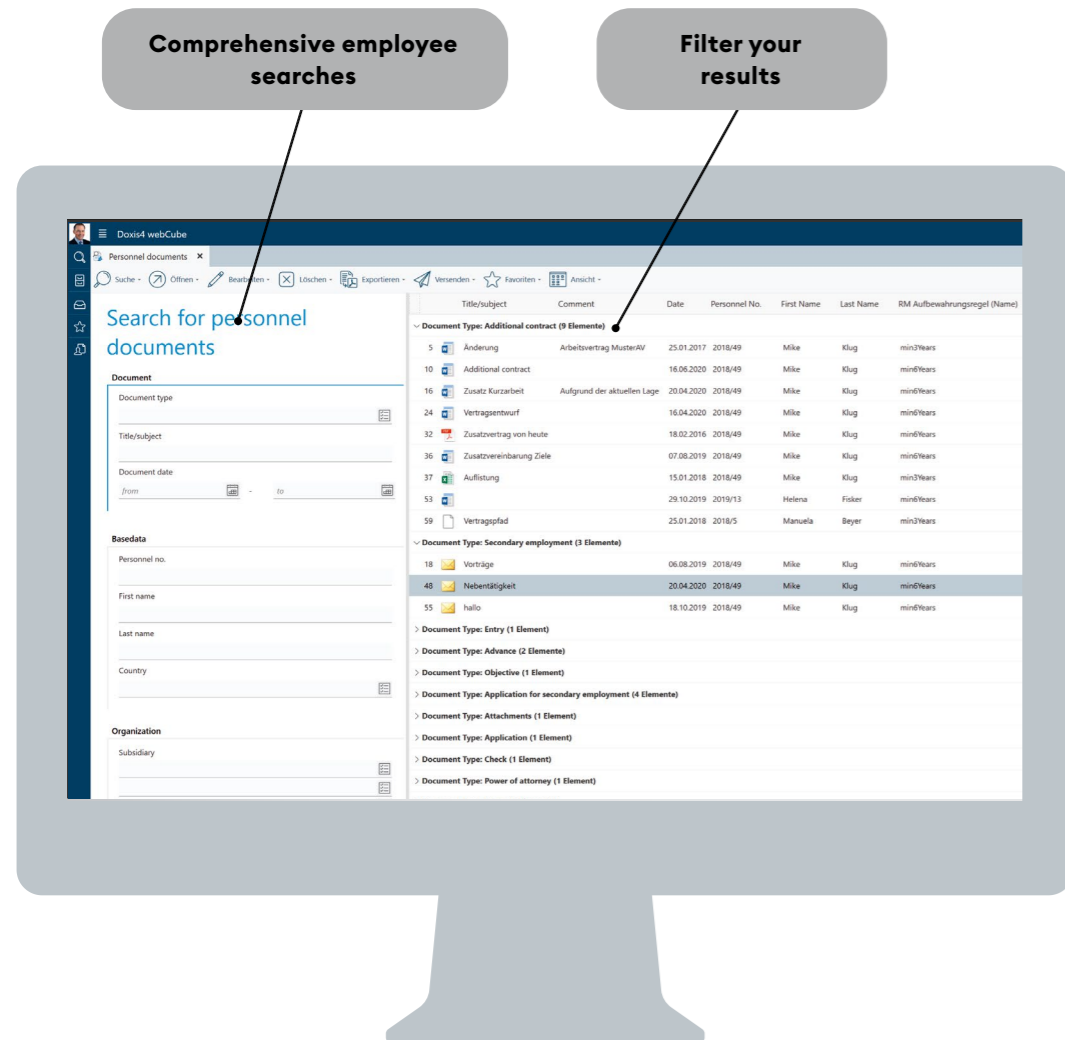
See all key data at a glance

The screenshot displays a web browser window with the Doxis HR eFile interface. On the left, a sidebar shows a hierarchical folder structure for document management. The main content area is titled 'Personnel record' and contains a form with various fields organized into sections: 'Personnel data', 'Contract data', 'Personal data', 'Address', and 'Bank account'. A callout box at the top points to the synchronization feature, another at the bottom left points to the folder structure, and a third at the bottom right points to the data fields. A small employee photo is visible on the right side of the record form.

Less searching, more finding

Find HR data quickly & provide information at any time

Having a clear filing system in place is crucial when searching for employee documents and skills. The Doxis HR eFile puts all information at your fingertips. Looking for all certificates of professional development from the last year? In Doxis, not only can you search for these documents across all files, but you also find the associated files and processes. The full-text search is particularly useful, for example if you can remember a specific passage from a contract or email. Use the preview function to quickly and conveniently browse the search results without opening the document first. You save precious time and can respond to requests for information without delay.



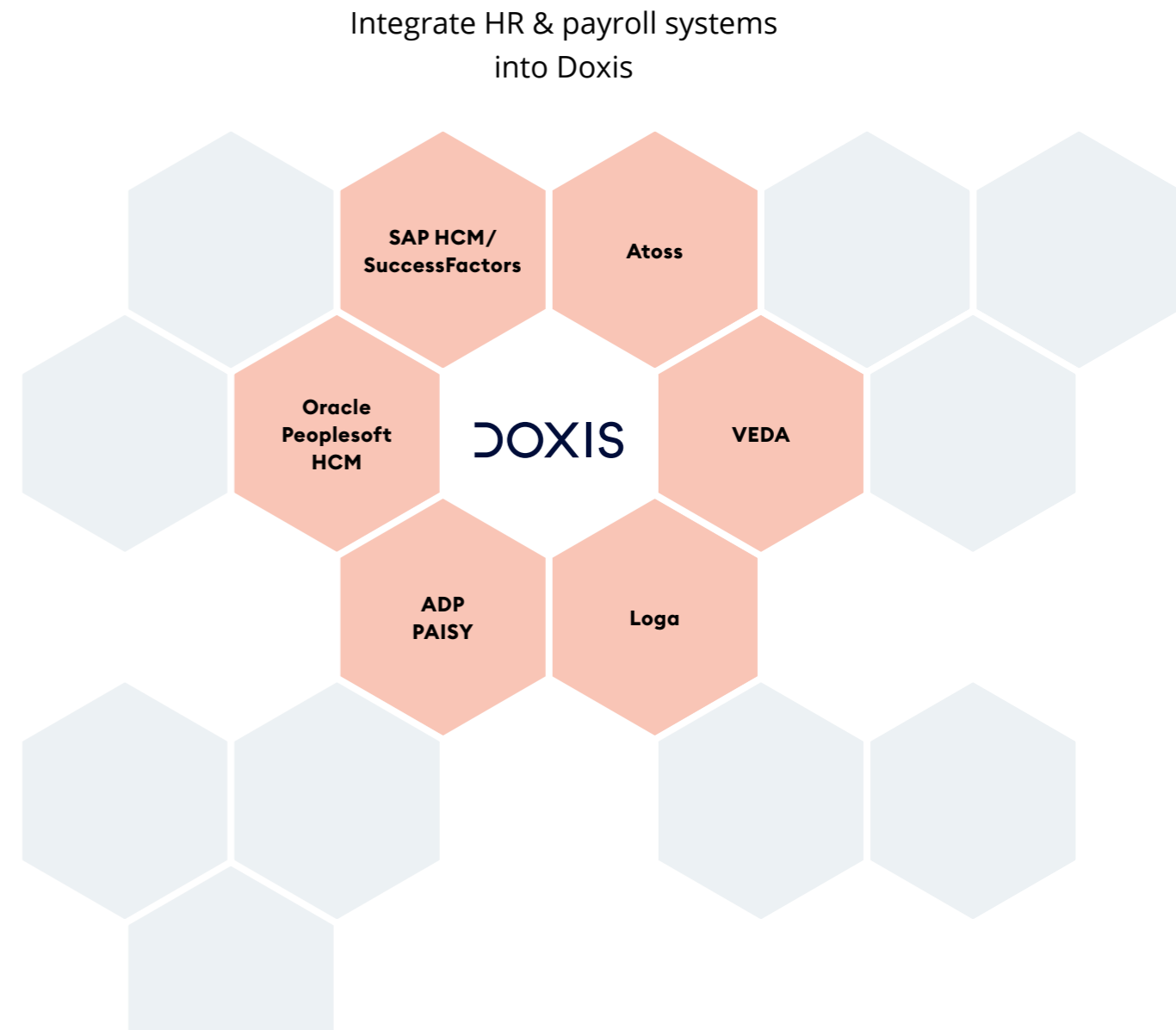
Integrate with business applications

HR & payroll systems

Most companies use various applications for recording working hours, payroll accounting and travel expense accounting. If you've already had to manually transfer data between multiple systems, you'll know how complicated, time-consuming and prone to error it can be. Doxis makes this a thing of the past: The Doxis HR eFile transfers all data collected by these systems and updates it automatically when changes are made. When you add a new data set in your HR system, Doxis automatically creates a new digital HR file for you.

The big advantage? You keep all information from your systems secure in Doxis and perform searches directly from whichever application you are currently using – Doxis, your HR system, even from Microsoft Office programs.

What the experts say: Integrate your applicant and employee portal – and manage job postings, inbound applications, staff news and much more directly with Doxis.



Protect sensitive information

Audit security, EU GDPR compliance, retention and deletion requirements

Personal data needs special protection. It is only intended for certain employees. In Doxis, you say exactly who can use which files, folders, individual documents and processes and how – even if your requirements vary between different companies.

The Doxis HR eFile brings together all relevant personal data, which means you can be sure that information from other business applications is also being compliantly stored: For example, emails from Microsoft Office, SAP data, pay statements, etc. are archived securely and in compliance with external and internal guidelines and laws. They can also be retrieved at any time.

Demonstrable data protection

Does your company already have an authorization concept in place, e.g. in SAP? Simply transfer it to Doxis. And because exceptions are almost always necessary – for example, if managers need access to personnel eFiles in connection with disciplinary matters – in Doxis you can set up one-time rules specifying how long certain documents are available. Doxis keeps a full log of who viewed, updated and deleted which information, ensuring you meet legal requirements and can produce the necessary evidence in the case of legal disputes.



Certified protection

- Data protection (EU GDPR)
- Audit-proof archiving
- Certified interfaces to SAP
- Secure connection to Microsoft applications



Comply with automated retention & deletion periods

The next tax or social security audit is never far away. With Doxis, you archive all relevant documents in line with audit requirements. Doxis also complies with legal retention periods, so you never delete information too early – or too late: It reminds you about upcoming expiry dates and even automatically deletes documents for you. The following retention periods are preconfigured:

2 years: minimum for written warnings, overtime sheets, etc.

6 years: for income tax-related data & documents

10 years: payroll documents relevant for profit reporting

You can also manually assign other individual retention periods as necessary.

In addition to upholding legal retention periods, you must also ensure that, for example, applicant data can be deleted once the hiring process is complete in accordance with the EU GDPR. With Doxis, you can automate and document compliance-relevant activities and avoid penalties for non-fulfillment.

Automate & optimize processes

Fast, transparent and uniform

Whether you're planning employee meetings, professional development measures or onboarding/offboarding, your HR processes involve countless documents, many of which change hands multiple times in multiple departments, such as Purchasing, IT, Legal and more. Instead of using emails, circulation folders or mail, with Doxis you can digitize and implement these workflows and steer documents and all associated tasks directly towards the right colleagues. Doxis gives you a clear overview of who completed which task and informs you automatically when a colleague has not responded on time. In this way, you create transparency across all tasks and activities and ensure that they are completed in a timely manner.

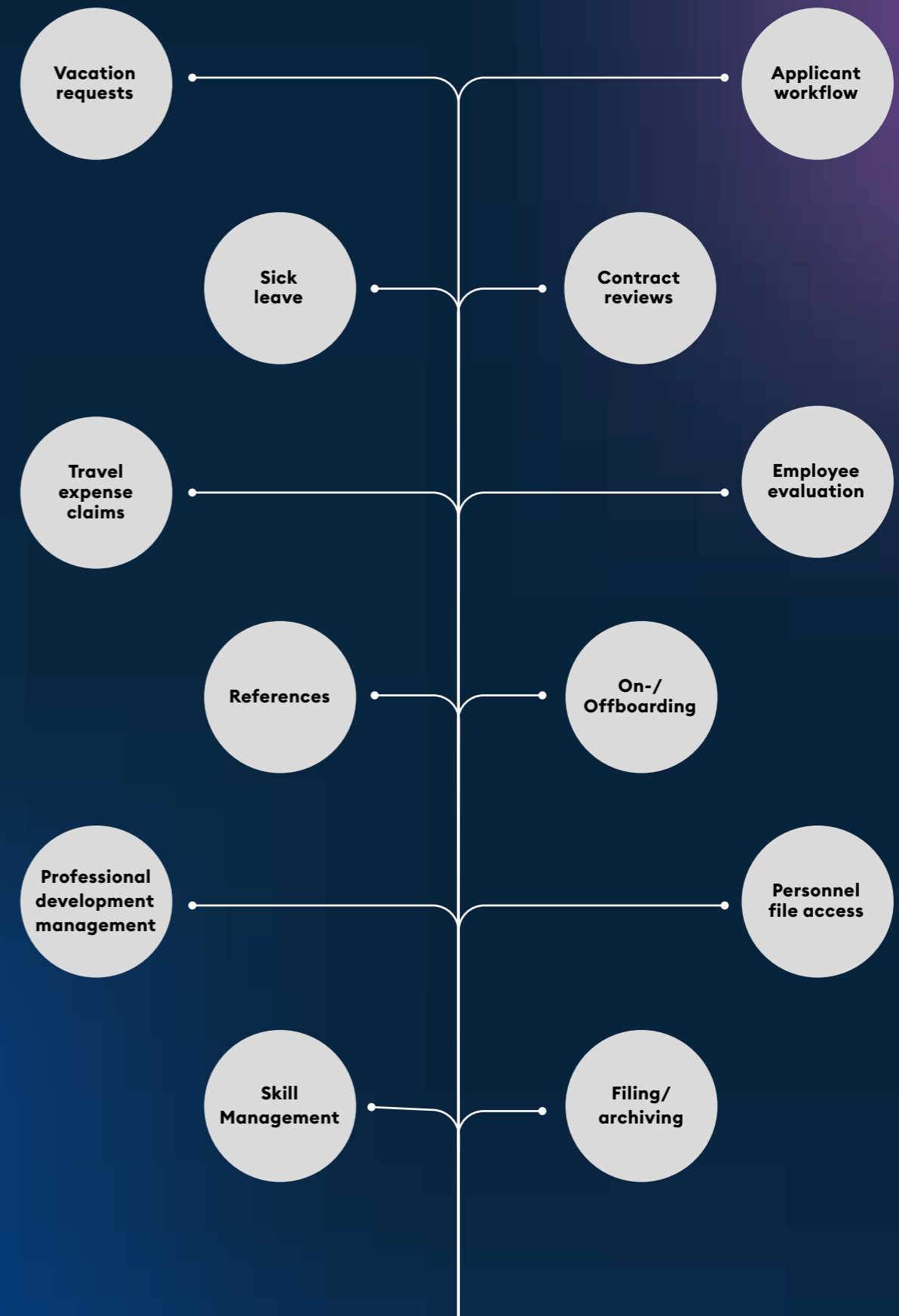
Automate HR processes

Processes like document filing, creating new files or transferring data from HR and payroll systems are incredibly time-consuming. This is where Doxis can help. It directly assigns inbound and new documents to the correct eFile or creates a new one, and supplements as well as updates related data.

You can also automate recurring tasks and many workflows, like drafting references and contracts, processing vacation requests and expense reports or even the entire onboarding process. And these are just a few examples of what automation can do for HR. With Doxis, you can automate these kinds of processes and not only save time, but also ensure that everything runs uniformly and transparently.

Collaborate securely with people outside your company

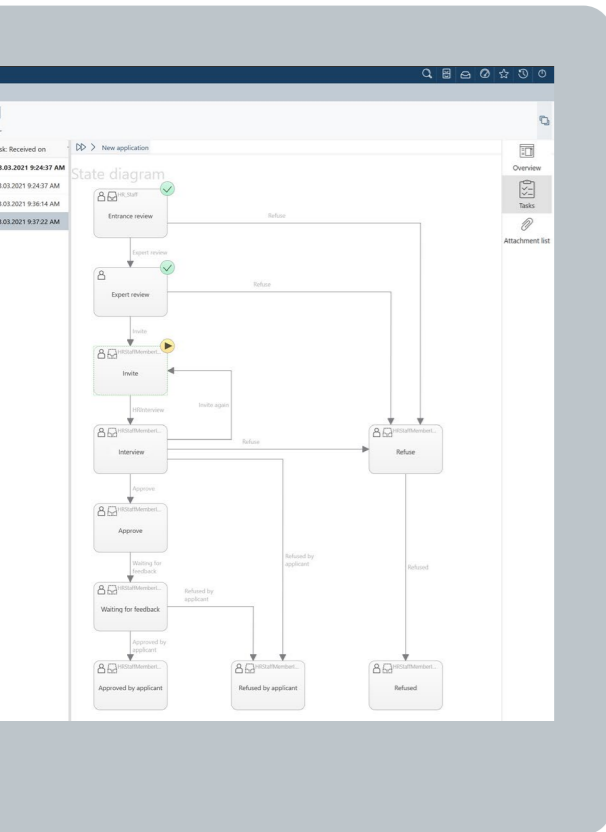
When posting a new job opening, do you work with external recruiters? What about working with a lawyer on a contract termination? Or an external trainer? The Doxis HR eFile enables you to integrate these partners and experts into a secure and virtual workspace where you can securely share documents, organize tasks and automatically document all workflow steps. This streamlines communication and speeds up collaboration.



Use Case 1

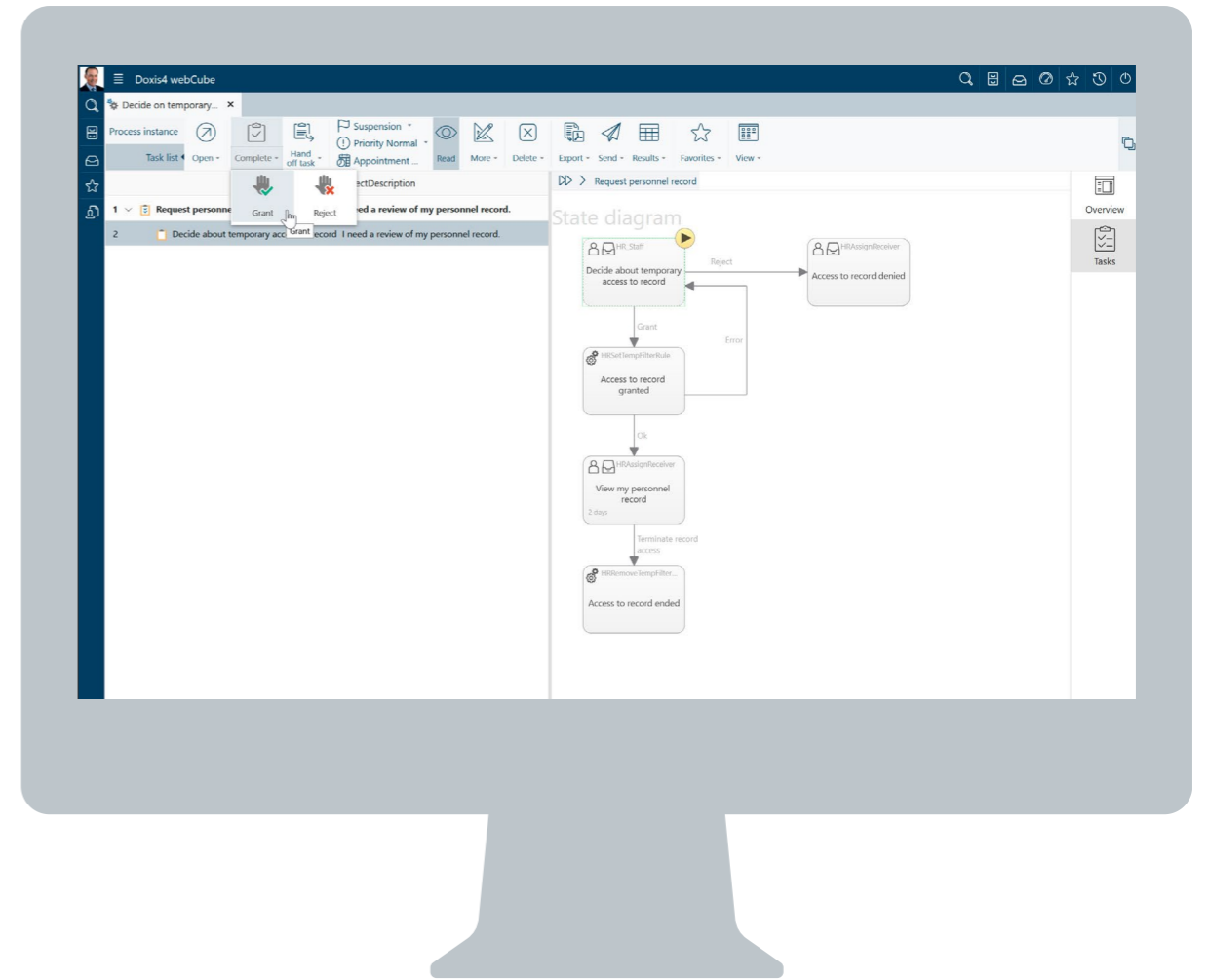
Automated applicant workflow

When applicants send their CVs, references or other documents, you can file them in Doxis in the context of the job posting, view the applicants and then integrate the departments into the workflow. Once you've found the right candidate for the job, Doxis automatically transfers the application documents into a new personnel file, where you have a complete overview of the career path of this person in your company. With Doxis, you can delete unneeded applicant documents once the hiring process is over – in compliance with EU GDPR.



With the employee entry workflow based on Doxis BPM, we are confident that new employees get the right software access, hardware and chip for building entry on time.

Sandra Nee, IT department,
Bernard Krone Holding SE & Co. KG



Use Case 2

Automated file inspection

When an employee asks to view their personnel file, you don't need to send the paperwork by regular mail or wait until you have the opportunity to pay a site visit. Your employees can request to view their file in just one click through Doxis. You receive an automatic notification and can specify the window of time that the eFile is open to the employee for viewing. Once this time period is over, access is automatically blocked again. This saves on time and effort. What's more, you can also continue working on the documents during the document inspection, which means you don't have to postpone work.

Mobile working

Work with eFiles from anywhere

Whether it's an employee talk in the office, a recruiting event in a different city, or a day working at home – as an HR Manager you need access to documents from anywhere. With the Doxis HR eFile, the age of carrying around stacks of paperwork and heavy files is over: Search, access and process all the HR documents you need digitally from your current location – even offline. Scan applicant details, signed contracts and much more directly on your mobile device, file them in Doxis and get the process underway from wherever you happen to be. It's fast and easy.

Electronic file management with Doxis makes working from home so much easier. If employees had to take home files in paper form, we would be far less flexible in our service.

Lars Hübchen, Head of Human Resources and Legal
Regional Association Westfalen-Lippe



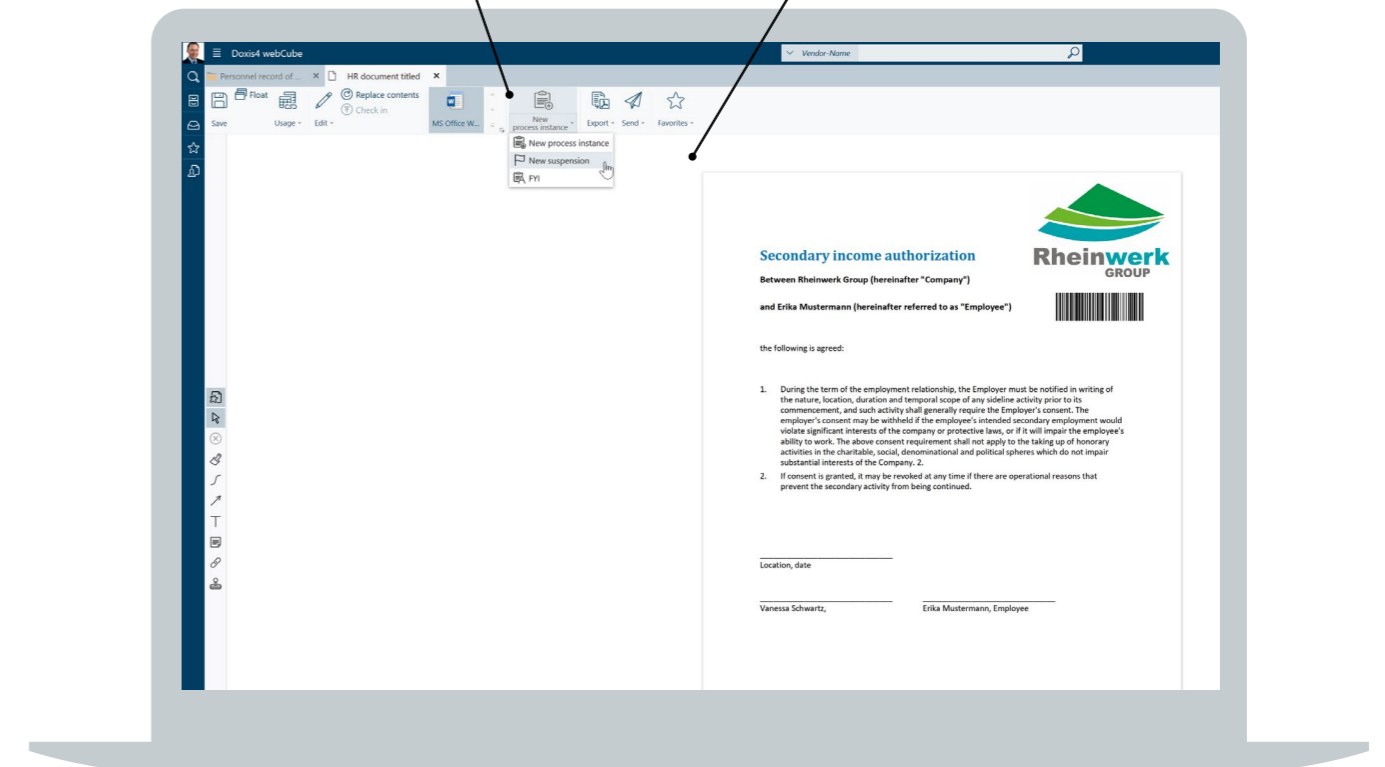
Deadline & date management

Never miss a deadline again

Trial periods? Time limits? Residence permits? Are the company vehicle leases already up for renewal again and have the driver's licenses been checked? Which company jubilees are coming up? The Doxis HR eFile keeps you apprised of all this and more, so you never miss a date or deadline again. The automatic reminder function not only keeps you on top of things, it also supplies all the documents you need – in good time – to deal with the matter at hand.

Work on documents directly in Microsoft Word

Timely reminders of open tasks



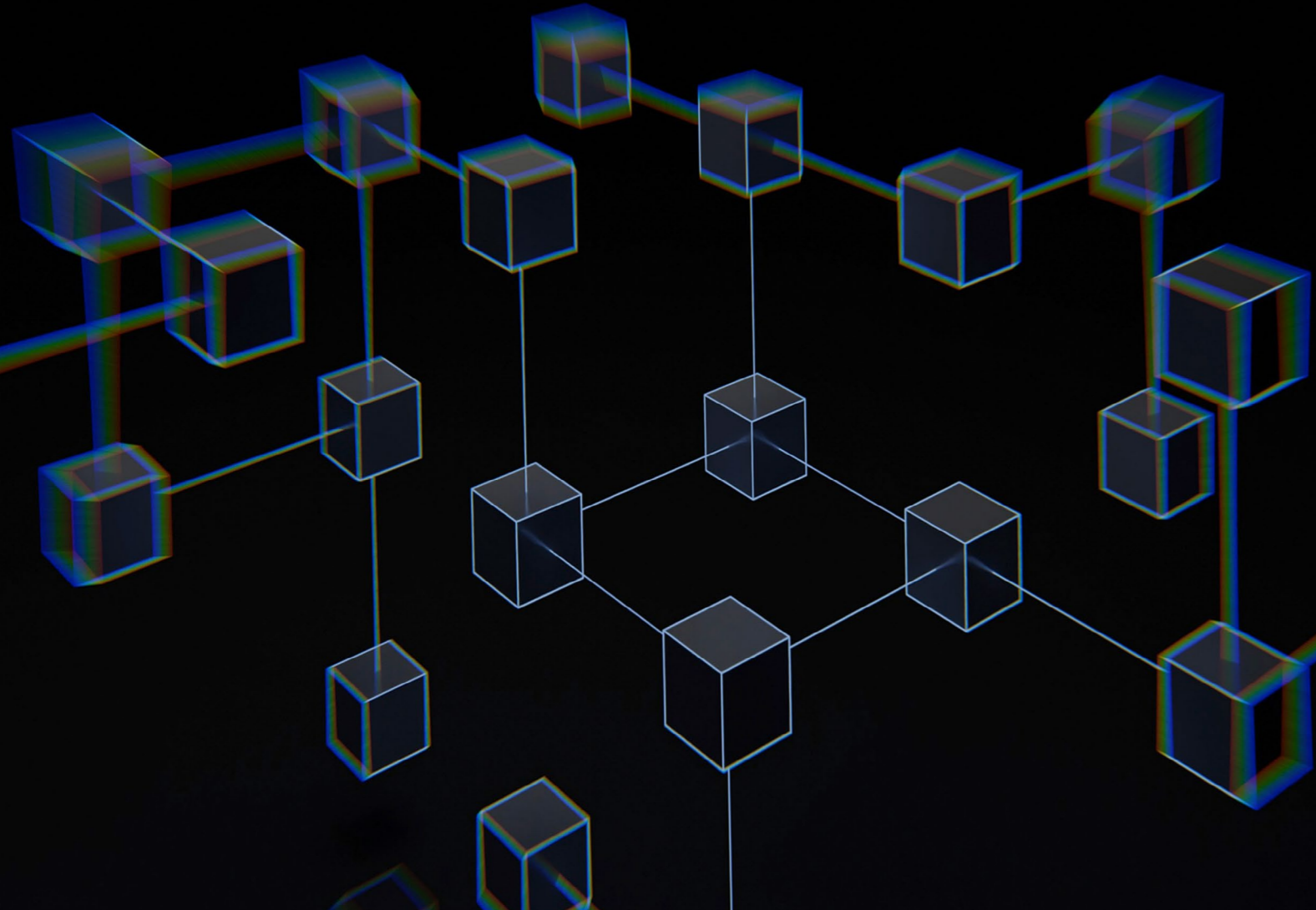
ECM strategy

Collaborate better, grow together

The HR eFile is just the first step: With secure access to all relevant personnel information, HR processes run in a structured, traceable and fast way – also across departments. So why stop here? Departments such as Purchasing, Accounting or Legal can also streamline their daily work with eFiles, e.g. for suppliers, contracts and invoices. With a foundation of digital files, it's possible to automate countless processes and thereby reduce processing times and manual work. When processes seamlessly flow through other departments, e.g. onboarding or

the purchase-to-pay process, this means your entire company is getting one step further on its digital transformation journey.

Doxis offers over 40 ready-to-run solutions for your company all based on one platform. Add components as needed – for all departments and locations – and grow them dynamically with rising user numbers and document volumes. Your company will be ideally prepared to handle any challenges that come its way.



Doxis's value added for your entire enterprise

Electronic files

For all company departments

Invoices & mail

Automated processing

Contract management

Across all departments

Digital processes

Across all locations & departments

Virtual project rooms

For internal & external partners

Company-wide archive

Secure & uniform access

12 languages

Worldwide information management



Why choose SER?

What motivates us

At SER, we believe people can achieve great things together. With Doxis, we want to help you achieve your goals. Your information forms the basis for this. Share it with colleagues and partners to streamline collaboration and facilitate smooth-running communication. Experience this return on information for yourself, with Doxis.

go.sergroup.com/HReFile

The full potential of knowledge can only be unlocked when as many people as possible benefit from it. That's why we want to share our experience with you and shape your digital future – together!

Want to learn more? Please feel free to contact us or write an email:
info@sergroup.com

We are happy to advise you!

As a vendor with over 35 years of experience in consulting and implementation, we offer the know-how and software suited to your company and its challenges.

Contact us.

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