MEMORANDUM

Date: November 18, 2020

To: Faculty & Staff

From: Office of Human Resources

RE: NEW File Management System Feature in UltiPro

Our HRIS (Human Resource Information System) Implementation continues with UltiPro® Employee File Management by PeopleDoc.

The Employee File Management (EFM) will enable HR to not only help to shift our focus from paperwork to people, but store and secure HR documents from a central location, providing compliance, security, and speed.

Once implemented in January 2021, our file management system will actively manage HR documents from a central location, allow digital storage, create retention rules, and provide efficient searching for HR documents.

Benefits/New Capabilities of EFM:

Produce, Access, and Send Documents with Ease
Create dynamic, logic-based digital documents from templates.

Increase Productivity and Accountability
Simplify daily HR tasks, such as sorting and searching for documents. Audit trails help us track who stored, moved, shared, or deleted files.

Proactively Manage HR Compliance and Increase Accountability
Quickly view missing documents or documents about to expire and request these documents from our employees.

Quickly and Securely Access Documents

Access files anytime, anywhere from a centralized file solution. Employee File Management provides a single source of information for HR and employees, saves time, and facilitates processes. Documents added to Employee File Management, HRIS, or other HR systems, automatically flow into the employee file. Paper documents can also be scanned and uploaded to an employee file.

Roll-Out Plans

In the coming weeks (2-months),

- ~~Ulti Migration – Data migration for onboarding module.~~
- Training – Weekly trainings through the completion of implementation.
- Implementation – Complete IT integration, Record Retention Policy, process for backing up files regularly.

Document Management Plan

- Organization – Internal audit of current files, sourcing files, separate by file type, organizing to:
  - *1. Upload a Document;*
  - *2. Scan a Document (Batch Upload)*
- Training – Record Retention policies and procedures, on-going EFM trainings
- Post Operation – Quality assurance, data recovery issues, plan of action for older records > 3-7-years.

We're excited to launch our new Employee File Management solution! **Have a moment? Watch this video for an overview of Employee File Management!**

Please continue to direct your inquiries and questions to the Office of Human Resources via email hr@fmuniv.edu and/or call (305) 626-3622 via Microsoft Teams Meeting: live chat, virtual sessions and/or virtual meeting appointments to accommodate our Walk-In Wednesdays.