



BUSINESS CHALLENGE

UK Greetings' HR team faced a number of challenges with its paper-based employee records management process. The company had switched to hybrid working during and post the pandemic and a paper based system did not allow HR to access employee information when working from home. Moreover, maintaining filing cabinets full of physical employee documents was inefficient, time consuming and did not fit in with the company's sustainability goals. Any new digital solution needed to help the team work more productively and provide HR with access to employee information at home and in the office. Personal data needed to be protected in line with the GDPR.

TRANSFORMATION

Macro 4 worked with UK Greetings' HR team to develop a GDPR-compliant online document store based on its Columbus information management software. To support hybrid working and allow the HR team to work more efficiently, authorized HR users now have remote and in-office access to all employee information, which is encrypted and stored as digital documents in a separate server within Columbus. New employee documents are saved as digital files along with scanned copies of the historical paper documents – everything is indexed and searchable using HR users' preferred search criteria.



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But even before this, we planned to go digital eventually – knowing that all the printing and filing we were doing was not the best use of HR's time.

Laura Roderick,
HR Manager, UK Greetings



GDPR-COMPLIANT EMPLOYEE RECORDS STORE SUPPORTS HYBRID WORKING SWITCH

UK Greetings is one of the UK's largest direct to retail publishers of greetings cards available through major supermarkets and independent retailers nationwide.

As part of its digital transformation strategy, the company enlisted Macro 4 to implement a GDPR-compliant digital document store to help its HR team manage the hundreds of thousands of employee records relating to its 2,700-strong workforce. A key requirement was enabling the HR team's switch to a hybrid working strategy in the wake of COVID-19.

BUSINESS BENEFITS

ENABLER FOR HYBRID WORKING STRATEGY

HR can access hundreds of thousands of employee records while working from home or in the office

SIGNIFICANT SAVINGS IN HR TIME AND COSTS

Replacing paper with digital documents has freed HR from the manual filing workload and dramatically reduced print and paper costs

COMPLIANCE WITH THE GDPR

Employee information is encrypted, with access restricted to authorized users and ILM rules help to ensure personal data is destroyed at end of life

THE PANDEMIC WAS THE TRIGGER

“The decision to go digital was triggered by the pandemic lockdowns when we couldn’t work effectively because all employee information was held in filing cabinets in the office,” said Laura Roderick, HR Manager at UK Greetings.

“Being able to access employee records remotely has become a priority as hybrid working is now the norm in certain areas of our business. But even before this, we planned to go digital eventually – knowing that all the printing and filing we were doing was not the best use of HR’s time.

“We needed a secure digital system for managing employee information to improve team efficiency and help us provide a more responsive service internally by driving out our paper-based processes. Removing our reliance on paper is also a key part of our corporate sustainability objectives.”

The new solution, which is based on Macro 4’s Columbus enterprise information management software, holds between 10 to 100 documents for every employee, such as contracts of employment and employee changes, all of which must be retained for seven years after someone leaves.

The HR team can now access employee records whether working from home or in the office, with information indexed to allow them to find documents easily using their preferred search criteria.

All documents are encrypted and stored on a separate server, isolated from UK Greetings’ main file server to protect employees’ personal data. Role-based access rules provided through the software ensure only authorized employees can view the information, in line with the GDPR.

DRIVING HR EFFICIENCY AND COST REDUCTION

Moving to a digital solution has delivered significant time and cost savings, explained Laura Roderick: “Now, if I need to email a document to someone, it’s done and dusted in 10 to 20 seconds, no need to look through a physical folder – which takes so much longer. Little things like this can make a big difference in making us more productive every day.”

The confidential nature of employee information meant HR had sole responsibility for maintaining the previous paper filing system – as well as for printing and posting documents to employees – all of which soaked up a significant amount of HR time.



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Major filing tasks used to be split across the team, with individuals potentially spending up to an hour a day during the course of a week. And as filing can be mundane and laborious there was always a chance of human error and documents being misfiled.

As well as allowing HR to use its time more productively, the removal of physical files has allowed the wall separating the HR office from the adjoining filing room to be knocked through, creating space for the expanding team. Savings have been made through the dramatic reduction of paper and print, with HR also doing away with the expense of running a dedicated printer, choosing instead to use a shared device in a different part of the building.

Site-wide audits, which can be instigated multiple times a year by UK Greetings' customers, the major retailers, are less time consuming now as HR can quickly lay their hands on the required documentation in Columbus rather than trawling through physical folders.

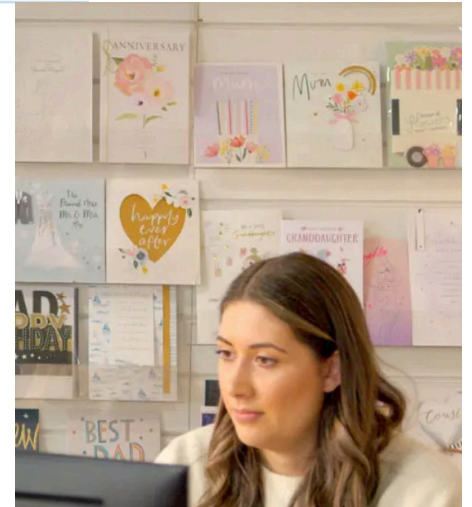
"Auditors usually request checks of employee information such as employment contracts and documents to determine compliance," said Laura Roderick. "Handling this digitally has made things so much easier. On the last audit I was able to pull all the documents up on screen with the auditor sitting next to me."

INFORMATION LIFECYCLE MANAGEMENT

Macro 4's software applies information lifecycle management (ILM) rules to ensure employee data is managed according to the GDPR. For example, the system identifies all documents related to people who have left the company so they can be moved to a separate archive within Columbus. And as leavers' records and other documents approach end of life, they are automatically marked for deletion, awaiting a final authorization by HR.

Previously when an employee left the company, HR moved all their physical documents into a separate filing cabinet. At the start of the new year, the leavers' records were sent to a scanning bureau after which the digitized information was archived.

"We no longer have to go through the time-consuming process of boxing up and checking physical leavers' files ready for scanning – or verifying all leavers' records are included in the scanned archive files when they come back, and we've also been spared the expense of using the third-party scanning service," Laura explained.



There was a lot of data to review, but Macro 4 was brilliant at sorting through it. The HR team is happy as the software does exactly what we want it to. Throughout the process Macro 4's been very responsive. And if we've needed extra support post-deployment, it's always been there.

Laura Roderick,
HR Manager, UK Greetings



WORKING WITH MACRO 4

As a trusted supplier which had already implemented an enterprise information management solution for the UK Greetings finance department, Macro 4 was recommended to HR by the company's Information Systems team.

"We're not IT people, so when Macro 4 first came in, they provided easy-to-understand explanations and demos. They understood our needs and planned a solution to meet all our criteria – including making it easy to manage and access information while ensuring security and compliance and allowing us to work more productively without the flow of paper."

The success of the project relied on Macro 4 ensuring that information from multiple sources was correctly imported into the system, ending up exactly where required so it could be easily accessed whenever needed. Scanned versions of paper documents from the old filing cabinets had to be tagged with precisely the right metadata so each one was recognizable to the system.

Additional analysis was performed by Macro 4 to classify and index the employee records the HR team had been forced to save digitally on the UK Greetings file server when the office was not as accessible during the pandemic – as well as several years of leavers records held in electronic archives. All information was classified quickly, despite documents being saved in a variety of formats.

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NEXT STEPS

After the success in HR, UK Greetings can see the potential to drive more value from Macro 4's technology, said Laura Roderick: "Macro 4's software has proved itself and we're open to the possibility of extending it to other departments that need to improve the way they manage information."



THE NEXT STEP

Read about other companies who have used Macro 4 software solutions to transform their organizations macro4.com/resources or contact us to learn more.

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