Human Capital Management Demo

# Scenario

This demo begins with a person submitting a job application at Solution Services. The person can apply directly online (Forms) or fill out a paper application (Quick Fields). Once the application has been received, it will get routed to the recruiting team for initial screening. If the applicant passed the initial screening, the application will get routed to the manager for review and hiring decision.

Notifications

Performance Review

Offer Made

Job Application

Recruiter Screening

Hiring Decision

Manager Review

# Preparing the demo­

Open the following applications:

* **Outlook**
* **Laserfiche Desktop Client / Web Access:** Laserfiche / password: l
* **Forms**
  + Sign in as username: Laserfiche / password: l
* **Quick Fields**
  + Open HR Applications
* **Solution Services Career Page**
  + Google Chrome Bookmark Bar – Human Resources Folder > Careers

# Running the demo

## Job Application and Recruiter Screening

There are two ways to submit a job application, choose your own adventure:

### Forms

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open Career Website from Human Resources folder in bookmarks bar | Forms can be embedded in existing websites |
| 2. | Choose a position to apply for and click on it. |  |
| 3. | Fill out job application and upload pre-existing resume located at C:\Demo Files\Uploads\Human Resources | Introduce benefits of Forms in streamlining information capture  Show FAQ pane |
| 4. | Submit and **Return to Forms Inbox** | Customized Thank You message |
| 5. | Open Task – “Application Screening” | Talk about Teams in Forms  Application is read-only |
| 6. | Leave comments and select “Screened” |  |

OR

### Quick Fields

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open **HR Applications** Session | Introduce Quick Fields |
| 2. | Click Scan | Talk about what QF is doing: scanning, identifying document type, extracting info, indexing, document revision, dynamic folder path, redaction |
| 3. | Click “Store All Documents” | Laserfiche will take care of routing the documents to the right place |
| 4. | Close QF |  |
| 5. | Open **Outlook** and read emails | Laserfiche automates dynamic notifications |
| 6. | Click on desktop client shortcut or Web Access link | Employment Application opens up in the document viewer  Talk about   * Metadata * Security * Business Process Pane |
| 7. | Change the Application Status field to “02 Screened” and save. | Laserfiche will take care of routing the documents to the right place |

## Manager Review

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open **Outlook** and find email that was sent to Matt Manager | Dynamic email pulls information from the form and makes the notification more informative |
| 2. | Click the shortcut or Web Access link to open the submitted application. | Application has been automatically routed to \Human Resources\Onboarding\1. New Applicant  Applicant folder is automatically created |
| 3. | Open Business Process pane | Talk about business process instructions |
| 4. | Change Application Status | If you want to speed up the demo, go directly to 05 Hired:   * 03 Approved * 04 Offer Made * 05 Hired * 06 Rejected   Applicant folder will be routed to Human Resources\Onboarding\2. Under Consideration\Applicant Name |

## Hiring Decision

Depending on what you set the hiring decision to earlier, you’ll receive different notifications.

### 03 Approved

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open **Outlook** and find email that was sent to Matt Manager  Return to application and change application status to move on | Includes Interview Schedule and Interview Questions |

### 04 Offer Made

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open **Outlook** and find email that was sent to applicant | Offer Letter is automatically generated  Copy is filed in applicant folder |
| 2. | Open **Recruiting** PHP Site (this is not Laserfiche!) and select profile for the applicant and click “Application Profile” | Application has been automatically routed to \Human Resources\Onboarding\1. New Applicant  Applicant folder is automatically created |
| 3. | Hit Connector button – Import Signed Offer Letter | Document is located at C:\Demo Files\Uploads\Human Resources\Scans  Connector uses information about the document |
| 4. | Hit Connector button – Open Applicant Folder | This will run a search in LF and open the applicant’s folder |
| 5. | Change Application Status to 05 Hired | Sets off other notifications and processes as noted below  Moves applicant folder to Employee Files and creates records |

## Notifications

Check Outlook for notifications (3 emails)

* Notify IT to prepare for employee onboarding
* Notify manager to conduct performance review
* Notify employees to fill out benefits enrollment after probationary period

## Performance Review

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Open notification in Outlook |  |
| 2. | Fill out performance review task and submit | This process has been started since we know that 90 days after someone starts, we give them a performance review |
| 3. | Open Task – Employee Acknowledgement | Completed form is saved in the employee folder |

## Records Management

|  |  |  |
| --- | --- | --- |
| Step | Clicks | Talking Points |
| 1. | Login as Ralph Records |  |
| 2. | Show 0H1 Human Resources record series  Show Retention Schedules and Cutoff Instructions in the column data. | Application files have been stored here, being governed by the appropriate retention rules.  Talk about Transparent Records Management: The Records Management view and the HR view exist at the same time, in the same repository, allowing multiple different users to access a single copy of a record from views specifically tailored to their needs |

## Forms Reporting Tools

Navigate to the Reports Page or use links in the Human Resources bookmarks folder.

* **HR Application – Performance Dashboard**, shows recruiter performance during initial applicant screening
* **Performance Review – Operational Dashboard**, shows how many managers still need to complete performance reviews and how many employees still need to acknowledge