



pwc

Document Tags

A PwC Product

**PwC's solution for efficient
document management
in Workday**

Content

1.	Your challenge	03
2.	Our solution: Document Tags	04
3.	Special features	06
4.	Efficient document management: Staying compliant more easily	07
5.	Use case: Long-term assignment abroad	08
6.	FAQ	09
7.	Contact	10

Your challenge

All aspects of the working world are changing – from the workplace through the workforce to the work itself. HR departments must constantly create and manage new documents. At the same time, employees are always obliged to comply with the requirements of laws and regulations.

In the life cycle of every employee's master record, countless documents are created – from recruitment to termination of employment. Therefore, effective handling of this sometimes very sensitive information is just as important as handling other master data. In addition, there are strict deadlines and a high organisational effort due to the work of several employees on many HR documents. Workday offers you a comprehensive HR management solution for these complex tasks – from remuneration and payroll to time recording and shift planning.

However, there are currently insufficient out-of-the-box document management capabilities in Workday. This leaves Workday users with the challenge of ensuring compliance and user interaction. But implementing external solutions is often costly and time-consuming.

With Document Tags, PwC has developed a Workday feature to facilitate interactions between users in HR departments and the review of documents, thus organising smooth collaboration.





Our solution: Document Tags

With **Document Tags**, your HR department can easily and efficiently manage, edit and automate all documents with functionality built into Workday – without buying an external solution. Additional document deletion check-ups and profile completeness checks help ensure compliance.

Your benefits

- All data and functions remain in one system.
- Compared to other solutions, Document Tags has 40-70% lower costs and less effort, as no additional custom integrations have to be created.
- HR departments can save time, meet deadlines and easily check documents for completeness.
- Improved reporting functions through additional detailed information from the documents.



Our solution: Document Tags

PwC's Document Tags solution extends the document management capabilities in Workday:

Manage documents as a team

- Documents that are uploaded as part of an HR business process can be provided with additional information – the so-called Tags.
- Provide documents with important information such as a deletion deadline, a date on which the document should be reviewed or in which business process the document was added.
- Define which documents must be present in an employee profile and identify discrepancies.

Automate Tags

- Tags can be added manually or automatically.
- With our powerful set of rules, we provide you with “Simple Rules” that you can activate with one click to tag your documents after uploading them to the system.
- In addition, you can add your own rules to automatically assign Tags to documents as you wish.
- Tags can include not only text, but also locations, organisations and dates.

Stay on top of everything

- Find documents and filter by Tags as well as the predefined attributes.
- Filter by individual employees or get an overview of all employees in your area.
- The existing authorisation system in Workday is used, so that authorised persons only have access to the documents they need.
- All Tags can also be used in your customer or standard reports to filter by criteria.

Special features

Document Tags helps you to find your documents quickly and easily as well as to edit them accordingly:

On a new overview page, your employees can see all documents and the corresponding document Tags. You can create the Tags yourself and assign a colour profile to them.

Trigger direct actions on the displayed documents – the drop-down menu provides these actions.



Use the filters to find documents directly and filter by one or more Tags with just a few clicks.

Use these actions in the single view mode or for all employees to whom you have access through your permissions.

Efficient document management: Staying compliant more easily

Currently, Workday customers have to rely on an external EPF (Electronic Personal File) system or complex solutions for efficient and compliant document management.

Due to the diversity of document types, companies face the challenge of remaining compliant in their HR document management. The degree of complexity increases due to globally diverging legal frameworks, such as different retention and deletion periods.

Document Tags enables users to automatically check the completeness of document sets. HR departments can thus quickly determine whether a document is missing and proactively take the necessary steps.

By creating and assigning various Tags (e.g. Tags for time, region and text), HR employees can obtain an overview of all their employees' documents at the touch of a button. Filtering by one or more Tags quickly displays the documents they are looking for and need.

Furthermore, monthly reports can be used, for example, to display an overview of documents for which an action is imminent, such as the deletion, renewal or review.

Document Tags is an add-on integrated into Workday. All documents and data thus remain in the Workday infrastructure. The synergy of the Workday functionalities and Document Tags enables, amongst others, a low total cost of ownership, a short implementation time and a high level of data security.

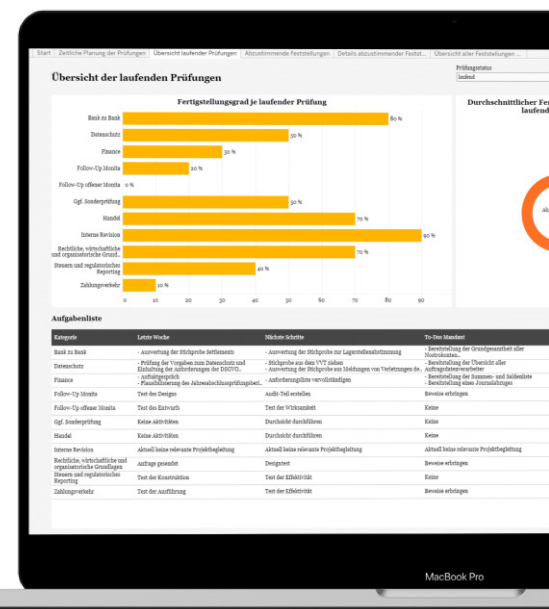
Use case: Long-term assignment abroad

When sending an employee abroad for a longer period of time, in addition to managing regular documents, it is necessary to ensure that all relevant applications have been made and, in particular, that the residence and work permit is valid for the host country.

With the help of Document Tags, the HR department can assign various criteria (Tags) to relevant documents, e.g. to set an expiry date for the visa or a review date for a document. Regular automatic reports enable HR staff to see at an early stage whether an application needs to be renewed. This may be the case, for example, for long-term assignments or extensions of working abroad.

If HR staff would like to view all documents related to the assignment, they can simply filter by “assignment” and receive a detailed overview of all documents at the touch of a button.

With Document Tags, companies benefit from the guarantee of an efficient check of the completeness of documents based on the definition of document sets. For example, HR staff can find out with just a few clicks which documents are still missing to apply for an entitlement insurance.



FAQ

Answers to the most frequently asked questions

How long does it take to set up the document management solution?

The implementation usually takes two weeks. During the implementation phase, the solution is installed in your tenant, a basic setup is carried out and your employees are trained on how to use Document Tags for efficient document management.

Is there an upper limit for tagging documents?

We have set an upper limit of 20 Tags that can be added to a document.

Which documents can I tag with the document management solution?

Our solution enables the tagging of documents from employees as well as documents uploaded as part of an HR business process. In the future, documents from the financial department can also be tagged.

Can I use Tags to identify the documents to be deleted?

Yes! Document Tags allows you to create detailed reports for your documents and thus, for example, add a Tag with a deletion period.

Does Document Tags change the way documents are stored and processed?

No! Our product is purely an add-on to Workday's standard functionality. If you decide to stop using our solution, this will not affect the documents added and how they are stored.



Visit our PwC Store!

Get the best out of your documents with our solution!

Contact us.



Sebastian Schmitz | Product Sales | PwC GmbH
sebastian.s.schmitz@pwc.com



Thomas Fritsch | Product Sales | PwC GmbH
thomas.fritsch@pwc.com



Daniel Mitschke | Product Manager | PwC GmbH
daniel.mitschke@pwc.com

