

Hyland Care for Employee File Management Solution Requirements

Status	Use Case # Requirement #	Business Process	Functional Area	As the	I shall be able to	So that	Full User Story Text
Draft	HR-CAP-001	HR EFM	Capture	HR Analyst	Import an email from my Outlook inbox or a shared inbox to add to an employee's electronic file	so that the email is stored electronically in the system for the employee using the defined taxonomy	HR-CAP-001 - , the HR Analyst shall be able to Import an email from my Outlook inbox or a shared inbox to add to employee's electronic file, that so that the email is stored electronically in the system for employee using the defined taxonomy.
Draft	HR-CAP-002	HR EFM	Capture	HR Analyst	Selectively import attachments to an email from my Outlook inbox or a shared outlook box to add to an employee's electronic file	so that the attached documents are stored electronically in the system for the employee using the defined taxonomy	HR-CAP-002 - , the HR Analyst shall be able to Selectively import attachments to email from my Outlook inbox shared outlook to add to an employee's electronic file, that so that the attached documents are stored

							electronically in the system for employee using the defined taxonomy.
Draft	HR-CAP-003	HR EFM	Capture	HR Analyst	Bulk scan Employee file documents with a multi-Function Device	so that the document(s) is(are) stored electronically in the system for the employee using the defined taxonomy	HR-CAP-003 - , the HR Analyst shall be able to Bulk scan Employee file documents with multi-Function Device, so that that the document(s) is(are) stored electronically in the system for employee using the defined taxonomy.

Draft	HR-CAP-004	HR EFM	Capture	HR Analyst	Import a single electronic document to add to an employee's electronic file	so that the document is stored electronically in the system for the employee using the defined taxonomy	HR-CAP-004 - , the HR Analyst shall be able to Import a single electronic document to a to an employee electronic file, that so that the document is stored electronically i the system for employee usin the defined taxonomy.
Draft	HR-CAP-005	HR EFM	Capture	HR Analyst	virtually print a single electronic document to add to an	so that the document is stored electronically in the system for the	HR-CAP-005 - , the HR Analyst shall be able to virtually print a single electror

					employee's electronic file	employee using the defined taxonomy	document to a to an employe electronic file, that so that th document is stored electronically i the system for employee usin the defined taxonomy.
Draft	HR-CAP-006	HR EFM	Capture	System	capture documents and metadata exported from as needed	so that documents exist in the employee file for day forward processing (e.g., New Hire Process with docs originating in HRIS)	HR-CAP-006 - , the System I sl be able to capt documents an metadata expc from as neede that so that documents ex the employee i for day forward processing (e. New Hire Proc with docs originating in HRIS).
Draft	HR-CAP-007	HR EFM	Capture	System	capture an initial HRIS	so that all employee data	HR-CAP-007 - , the System I sl

					data feed from that contains employee data	exists in the system and end users can be assisted with fully indexing an employee document with the most up to date information	be able to capture an initial HRIS feed from that contains employee data, so that so that all employee data exists in the system and end users can be assisted with fully indexing an employee document with most up to date information.
Draft	HR-CAP-008	HR EFM	Capture	System	capture a regularly scheduled HRIS data feed from that contains updates to employee information	so that the employee's data can be updated on documents and the folder view	HR-CAP-008 - , the System I si be able to capture a regularly scheduled HRIS data feed from that contains updates to employee information, so that so that the employee's data can be update documents and the folder view

Draft	HR-MNG-009	HR EFM	Manage	HR Analyst	Utilize the Employee Data feed using a reverse lookup on AFKS based on Employee Name	so that HR users can index the document from the employee name if they do not know the unique Employee ID for that employee	HR-MNG-009 - the HR Analyst shall be able to Utilize the Employee Data feed using a reverse lookup AFKS based on Employee Name so that so that users can index the document the employee name if they do not know the unique Employee ID for that employee
Draft	HR-RTR-010	HR EFM	Retrieve	HR Analyst	retrieve individual documents for an employee	so that I can view a desired document	HR-RTR-010 - the HR Analyst shall be able to retrieve individual documents for an employee, so that so that I can view a desired document
Draft	HR-RTR-011	HR EFM	Retrieve	HR Analyst	retrieve all employee documents based on Employee ID or Name	so that I can view all related employee documents for a single employee	HR-RTR-011 - the HR Analyst shall be able to retrieve all employee documents based on Employee ID or Name, so that so that I can view related employee documents for

							single employe
Draft	HR-RTR-012	HR EFM	Retrieve	HR Analyst	retrieve employee files through a foldering view	so that I can view documents within a virtual file cabinet	HR-RTR-012 - , the HR Analyst shall be able to retrieve emplo files through a foldering view, that so that I c view documen within a virtual cabinet.
Draft	HR-RTR-013	HR EFM	Retrieve	HR Analyst	retrieve employee documents while in on	so that I can quickly and easily access information on documents	HR-RTR-013 - , the HR Analyst shall be able to retrieve emplo

						needed for decision making while staying in LOB application/system of record for employee	documents w/ in on , so that : that I can quick and easily access information or documents needed for decision making while staying in LOB application/sy of record for employee.
Draft	HR-RTR-014	HR EFM	Retrieve	HR Analyst	enter words/phrases for searching across collections of full-text indexed documents	so that documents containing those words/phrases are returned	HR-RTR-014 - , the HR Analyst shall be able to enter words/phrase: searching across collections of text indexed documents, so that documents containing the words/phrase: returned.
Draft	HR-RTR-015	HR EFM	Retrieve	HR Analyst	view individual	so that I can take	HR-RTR-015 - ,

					missing documents in a specific employee's digital file	action to get missing documents imported in the system	the HR Analyst shall be able to view individual missing documents in specific employee's digital file, so that so I can take action to get missing documents imported in the system.
Draft	HR-MSR-016	HR EFM	Measure	HR Analyst	run a report of missing required documents in an employee file	so that I can take action to get missing documents imported in the system	HR-MSR-016 - the HR Analyst shall be able to a report of missing required documents in employee file, that so that I can take action to missing documents imported in the system.
Draft	HR-MSR-017	HR EFM	Measure	HR Analyst	export a results set from a query into an Excel / CSV file	so that I can utilize the data for reporting outside the system	HR-MSR-017 - the HR Analyst shall be able to export a result from a query in an Excel / CSV so that so that can utilize the

							for reporting outside the system.
Draft	HR-MNG-018	HR EFM	Manage	HR Analyst	to update document metadata for content stored in the system	so that errors can be corrected/updated in the system	HR-MNG-018 - the HR Analyst shall be able to update document metadata for content stored in the system, so that errors can be corrected/updated in the system.
Draft	HR-MNG-019	HR EFM	Manage	HR Analyst	delete documents stored in the system	so that errors can be deleted from the system	HR-MNG-019 - the HR Analyst shall be able to delete documents stored in the system, so that errors can be deleted from the system.

Draft	HR-MNG-020	HR EFM	Manage	HR Analyst	Add a note using sticky notes in OnBase	so that the note will be saved on the document for future review	HR-MNG-020 - the HR Analyst shall be able to Add a note using sticky notes in OnBase, so that the note will be saved on the document for future review.
Draft	HR-CAP-021	HR EFM	Capture	System	capture meta-data in an associated flat file for separated employees	so that a workflow event is triggered to start retention period	HR-CAP-021 - the System I shall be able to capture meta-data in an associated flat file for separated employees, so so that a workflow event is triggered to start retention period.
Draft	HR-CAP-022	HR EFM	Capture	System	capture meta-data in an associated flat file for	so that a workflow event is triggered to cancel previously set	HR-CAP-022 - the System I shall be able to capture meta-data in a

					employees that have been re-hired	retention period	associated flow for employees have been re-hired so that so that workflow even triggered to call previously set retention period
Draft	HR-MNG-023	HR EFM	Manage	System	destroy documents after prescribed retention period without the need for additional approval	so that the documents are deleted and purged from the system	HR-MNG-023 - the System I will be able to destroy documents after prescribed retention period without the need for additional approval, so that so that the documents are deleted and purged from the system
Draft	HR-MNG-024	HR EFM	Manage	HR Manager	manually exclude employee documents from purge process	so that the selected employee documents are not processed by the purge processor and deleted from the software	HR-MNG-024 - the HR Manager manually exclude employee documents from purge process shall be able to do that so that the selected employee documents are processed by the purge processor and deleted from the software.

Draft	HR-MNG-025	HR EFM	Manage	HR Manager manually exclude employee documents from purge process	manually remove exclusion of employee documents from purge process	so that the selected employee documents are available to be processed by the purge processor and deleted from the software	HR-MNG-025 - the HR Manager manually exclude employee documents from purge process shall be able to manually remove exclusion of employee documents from purge process that so that the selected employee documents are available to be processed by the purge processor and deleted from the software.
Draft	HR-MSR-026	HR EFM	Measure	HR Analyst	create a Missing Document Request	so that employees can be notified of missing documents in their employee file	HR-MSR-026 - the HR Analyst shall be able to create a Missing Document Request, so that that employee can be notified missing documents in employee file.

Draft	HR-MNG-027	HR EFM	Manage	Employee	create a HR Assistance Request	so that I can reach out to the HR department for general assistance on HR related matters	HR-MNG-027 - the Employee shall be able to create a HR Assistance Request, so that I can reach to the HR department for general assistance on HR related matters.

Draft	HR-RTR-028	HR EFM	Retrieve	HR Analyst	view a HR Assistance Request	so that the HR department can provide the requested assistance to employees in a timely fashion	HR-RTR-028 - the HR Analyst shall be able to view a HR Assistance Request, so that the HR department can provide the requested assistance to employees in a timely fashion
Draft	HR-MNG-029	HR EFM	Manage	HR Analyst	take ownership of a HR Assistance Request	so that the request can be worked on by a member of HR department	HR-MNG-029 - the HR Analyst shall be able to take ownership of a HR Assistance Request, so that the request can be worked on by a member of HR department.

Draft	HR-MNG-030	HR EFM	Manage	HR Manager assign HR Assistance Request to user		so that the request can be worked on by a member of HR department	HR-MNG-030 - the HR Manag assign HR Assistance Request to use shall be able to that so that the request can be worked on by a member of HR department.
Draft	HR-MNG-031	HR EFM	Manage	HR Analyst	remove ownership on HR Assistance Request	so that another HR resource can work the request if currently assigned user is unable	HR-MNG-031 - the HR Analyst shall be able to remove owner on HR Assista Request, so th that another H

							resource can v the request if currently assign user is unable.
Draft	HR-MNG-032	HR EFM	Manage	HR Analyst	request additional information	so that additional information needed can be requested from submitter	HR-MNG-032 - the HR Analyst shall be able to request additic information, so that so that additional information needed can be requested for submitter.
Draft	HR-MNG-033	HR EFM	Manage	HR Analyst	complete a HR Assistance Request	so that request can be completed and removed from workflow	HR-MNG-033 - the HR Analyst shall be able to complete a HF Assistance Request, so th that request ca completed and removed from workflow.

Draft	HR-MNG-034	HR EFM	Manage	HR Analyst	cancel a HR Assistance Request	so that request can be canceled and removed from workflow	HR-MNG-034 - the HR Analyst shall be able to cancel a HR Assistance Request, so that request can be canceled and removed from workflow.
Draft	HR-MSR-035	HR EFM	Measure	System	send escalations to HR user group every day for first three (3) days after Hire Date if employee file is missing I-9 document type	so that action can be taken by HR department to stay in compliance with I-9 requirements	HR-MSR-035 - the System I shall be able to send escalations to user group every day for first three (3) days after Hire Date if employee file is missing document type that so that action can be taken by department to stay in compliance with I-9 requirements

Draft	HR-MSR-036	HR EFM	Measure	System	send escalations to HR Manager user group every day after the three (3) day post hire date deadline has passed if employee file is missing I-9 document type	so that action can be taken by HR department to stay in compliance with I-9 requirements	HR-MSR-036 - the System I shall be able to send escalations to Manager user group every day after the three day post hire date deadline has passed if employee file is missing I-9 document type that so that action can be taken by department to in compliance I-9 requirements
Draft	HR-MSR-037	HR EFM	Measure	HR Analyst	view HR assistance requests by various metrics	so that to ensure HR Assistance Requests are being completed and gain insight into the types of requests employees are submitting	HR-MSR-037 - the HR Analyst shall be able to view HR assistance requests by various metrics that so that to ensure HR Assistance Requests are being completed and gain insight into the types of requests employees are submitting.