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Case Study – East Midlands Railway – Automated Document Processing & HR Records Management

Background

East Midlands Railway (EMR) is based in the East Midlands region of England, with its headquarters in Derby. The company operates train services across a wide area, including intercity routes connecting cities like Derby, Leicester, and Nottingham with London, Manchester, and Liverpool. EMR also has regional routes serving smaller towns and rural areas within the East Midlands and beyond. The company has around 2,500 staff and has been accredited nine times as a Top Employer.

The company has been working with Cleardata since 2016. Initially scanning the firm's HR Records. Digital documents are stored in Cleardox EDM, Cleardata's bespoke electronic document management system, which provides flexible access to digital information from any location.

In 2024 East Midland's Railways asked for Cleardata's help to automate the digital filing and processing of their new starter and HR records.

Reasons for automation

- HR digital filing was completed manually into the Cleardox EDM System, with around 80 inbound documents stored per day.
- This relied on a team member to name incoming files from inbound forms and system emails for new starters in the correct manner and place them into the appropriate folder.
- The task took around **30 hours** per week.

How did Cleardata help?

Cleardata automated East Midlands Railway's manual HR filing processes, enabling 80% of their filing to be completed with touchless processing. This included:-

- A data cleansing exercise was performed initially to identify any missing employee numbers, duplicate entries and remove empty folders.
- Automated workflows were implemented at the onboarding stage, with employee folders automatically created for new starters.
- Multiple systems were incorporated into the automated document process and digital filing workflow, allowing processing of emails and interpretation of filename attachments.
- Automatic search performed in Cleardata's Cleardox EDM System for the corresponding employee folder, with documents automatically filed into the appropriate subfolder.
- Application of a default naming convention, ensuring consistency, accuracy and compliance for HR records management.
- Efficient routing of exceptions, or documents requiring manual intervention, to a dedicated task queue for EMR's team to process, update metadata and subsequently file correctly.
- Files set to display in chronological order, regardless of their type.

Benefits

- Saved 30 hours per week for their HR admin team.
- 80% automation of manual processes achieved.
- Saving of approximately £20k per annum.
- Increased accuracy and consistency of filing process with automated naming conventions.
- Improved compliance for new starters process.
- Able to see a clear story of employees, with files displayed in chronological order, regardless of the file type.

80%
Automation
£20k
Savings

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Client Feedback

We asked Chris Buckley, Head of Organisational Development and Wendy Harvey, HR Manager at EMR for their feedback on how the automated document processing and digital filing project has helped their business?

"Our HR system emails and attached documents were being processed manually, with a member of our team, downloading attachments, naming documents, creating folders where necessary, or adding to existing employee folders.

Manual processing took around 30 hours per week and caused some inconsistency in naming conventions. We approached Cleardata with an idea to automate our HR digital filing process.

The new system automatically files our inbound documentation with default naming conventions, ensuring a consistency in our HR Records Management.

Documentation is filed in chronological order, which is important to us. It's improved our new starters compliance and provides us with the ability to be able to tell the story of an employee accurately.

We can add files and documentation throughout the employee journey, using the same automated process."

"This digital filing automation project has transformed our manual processes.

It's been a great success, automating around 80% of the process, providing a saving of around £20k per annum."

How do you find using Cleardox EDM?

"Cleardox EDM is an easy-to-use document management system and provides us with flexible access to our digital HR records, which is great for agile working and modern working practices.

The system provides a full audit trail, which supports our own audit and GDPR compliance processes.

Data is securely stored in a Microsoft Azure environment, which meets our information security standards."

How have you found working with Cleardata?

"We have a good relationship with Cleardata. The team are friendly, helpful and always provide a quick response.

Building the change, we found Cleardata's technical team walked us through the entire process and took us through the detail we needed to get it right.

We're not that technical, but the team were great in taking our ideas and turning them into a reality."