" *Document Locator pays for itself every day in the time-savings.* "

James Lodenquai
Human Resources Director
Vallarta Supermarkets

Customer: Vallarta Supermarkets
Industry: Retail

Critical Issue

Too much time spent searching for HR files in order to comply with internal and external audits. The manual filing of documents, and the problem of misfiled and lost records, were serious concerns.

Solution

An HR document management solution that saves time in filing and organizing HR records equivalent to one full-time employee.

Software and Services

Document Locator
HR Document Management Solution

Vallarta Supermarkets saves time in filing and organizing HR records

How an HR Document Management system organizes employee files at a leading independent grocer

Vallarta Supermarkets Inc. is "your quintessential Latino store" specializing in authentic Hispanic foods and ingredients appealing to a growing population of shoppers looking for a taste-of-home feel that can't be found in the aisles of a big box. Established in 1985 by the Gonzalez family, Vallarta currently operates in 50 locations across southern California. Their stores offer a Hispanic cultural experience featuring hot food, fresh bakery, vegetables, fruit, and cut to order fresh meats. Customers know they can say, "I want this piece cut in six different cuts and it'll be cut to order and wrapped quickly." This distinguishes them from other markets that offer prepacked grab and go from self-serve. Vallarta's stores even offer an in-house taqueria for dining in or takeout, and hold free Hatch chile roasting events. Their successful approach in catering to what customers crave in a shopping experience has enabled rapid expansion and generated double-digit revenue growth.

A Problem Managing Files in HR

Prior to implementing Document Locator's HR Solution, Vallarta managed employee records in filing cabinets. Human Resources Director, James Lodenquai, said their paper-based processes were inefficient and did not provide the level of control over sensitive HR records that he wanted. The biggest problem was the amount of time spent searching for documents to comply with internal and external audits. Another issue was the amount of time spent manually filing documents and dealing with misfiled or misplaced records.

The Search for an HR Document Management Solution

Lodenquai investigated several options before he decided on ColumbiaSoft's Document Locator HR Solution. Document Locator's Windows-based ease-of-use was key; James wanted a system that his staff would intuitively understand. He liked how employee records were organized and categorized so that when a new document was added, the system automatically named it. Another factor was Document Locator's ability to synchronize with their timekeeping system so new employees were automatically added to the HR file structure. A bonus was the addition of electronic forms so they could begin the process of converting paper forms to electronic forms.

Time Savings Equal to One Employee

ColumbiaSoft's professional services team tailored an HR Records repository to address Vallarta's unique needs. Folder structures are organized and categorized to manage employee records by store location, department, and user access rights. Records are named consistently and sensibly by automatically applying property values attached to each document to the file's name, such as employee number, document type, and date of the document. This makes it visually intuitive to know what a file contains. Descriptions can also be added to documents to indicate special circumstances, such as for tracking FMLA's. Every document is full-text indexed so HR staff can search for words or phrases inside documents and retrieve what they need quickly. A comprehensive document log tracks who accessed files, when it happened, and what action was taken.

Synchronization with their timekeeping system assures that new employees are added to the HR file system automatically, and terminated employee records are moved automatically to an archive.

"Document Locator pays for itself every day in the time-savings," said Lodenquai. Files are managed consistently so missing and misplaced records are no longer an issue. Staff can now find documents in seconds verses the hours they would sometimes have had to spend in the past. And, authorized users can securely access the system remotely through Document Locator's WebTools on their laptop or mobile device. All of these HR filing capabilities enforce consistency and accountability in how employee records are managed at Vallarta. Lodenquai says, "The time savings so far are the equivalent of one employee per month."

Update: Flexibility to Change HR Systems, Keep Records in Order

With HR files organized and in order, Vallarta later changed their timekeeping system. ColumbiaSoft's professional services team quickly transitioned the connection without a hitch, keeping HR files in sync throughout. The flexibility to change systems mid-stream while keeping HR records in order is just one more advantage of Document Locator that Lodenquai appreciates.