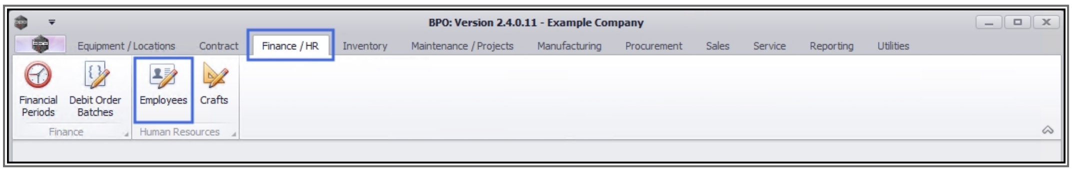
HUMAN RESOURCES

EMPLOYEES - DOCUMENTS

The **Documents** tile allows you to add, edit, delete and view digital documents linked to a selected employee, for example, a contract of employment. All your customer documents can be kept in one place by making use of this link.

The document should be saved on the **server** to enable all users with the relevant security rights to view the document. If saved and linked from the workstation, another workstation cannot view the document.

Ribbon Access: *Finance and HR > Employees*



1. The ***Employees*** listing screen will display.

VIEW EMPLOYEE DOCUMENTS

SELECT EMPLOYEE

2. Select the ***row*** of the employee whose list of digital documents you wish to view.
3. Click on the ***Documents*** tile.

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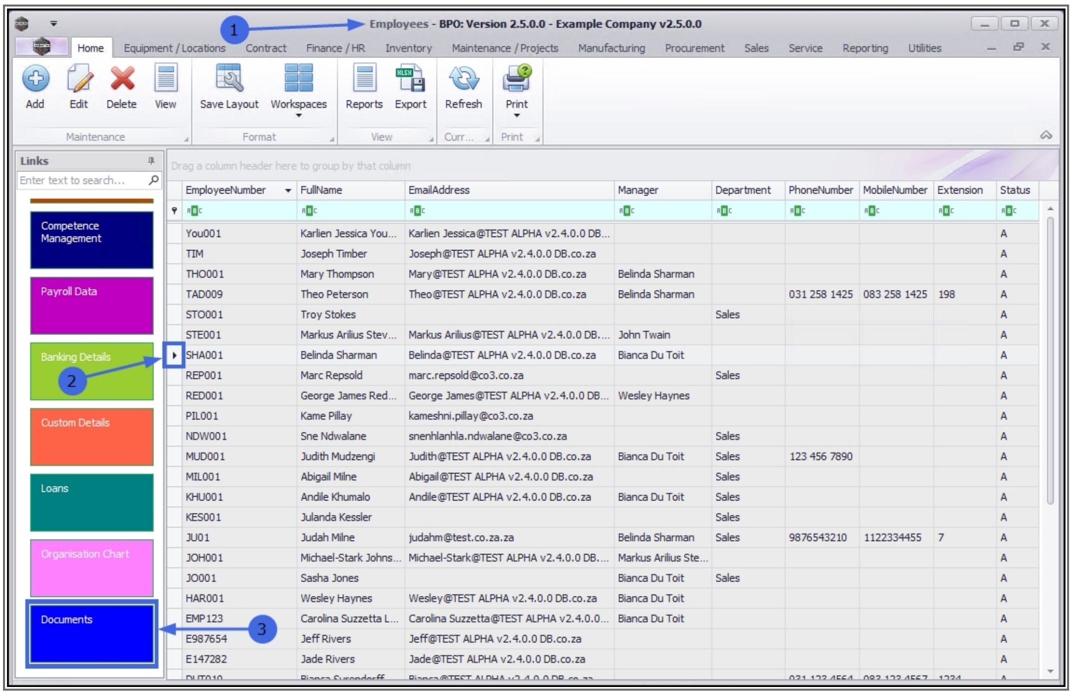

VIEW DOCUMENTS LIST

1. The ***Documents for Employee - []*** screen will open.
2. If there are any documents currently linked to the selected employee, they will be listed here.
    - In this example, only **1** document is currently linked to the employee.

ADD EMPLOYEE DOCUMENT

3. Click on ***Add***.

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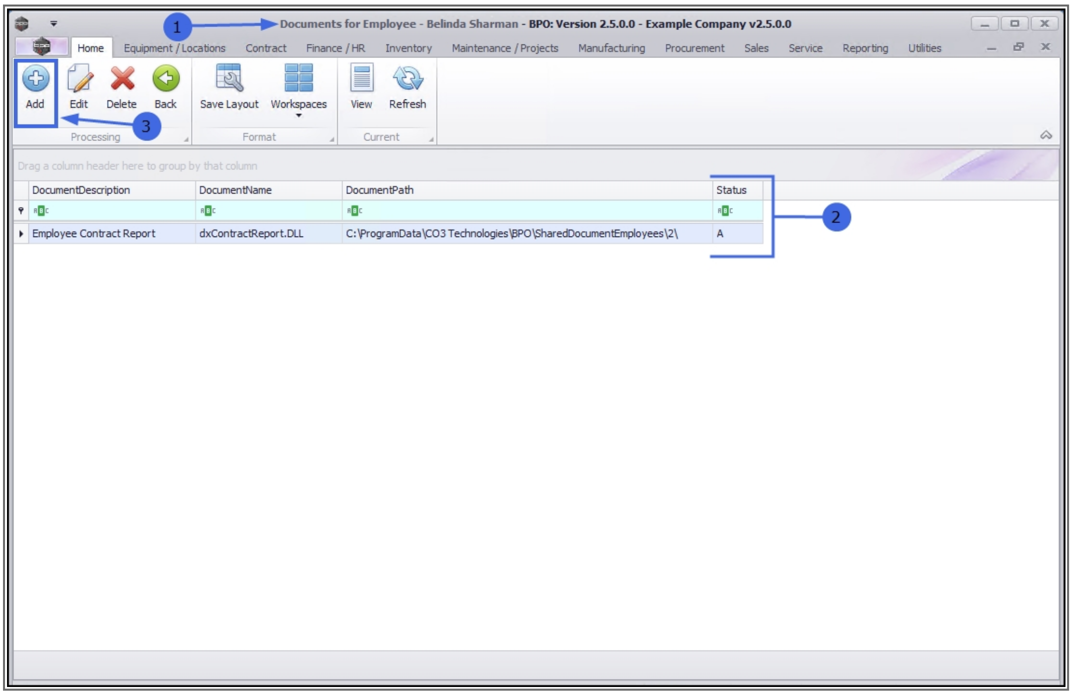

1. The ***Add a Document for employee []*** screen will open.
2. **Note** that the Repository Path field is populated with what has been configured on your system.
   - **Note**: The document should be saved on the server to enable all users with the relevant security rights to view the document. If saved and linked from the workstation, another workstation cannot view the document.

FIND FILE

3. Click on the ***search*** button in the ***File*** field.

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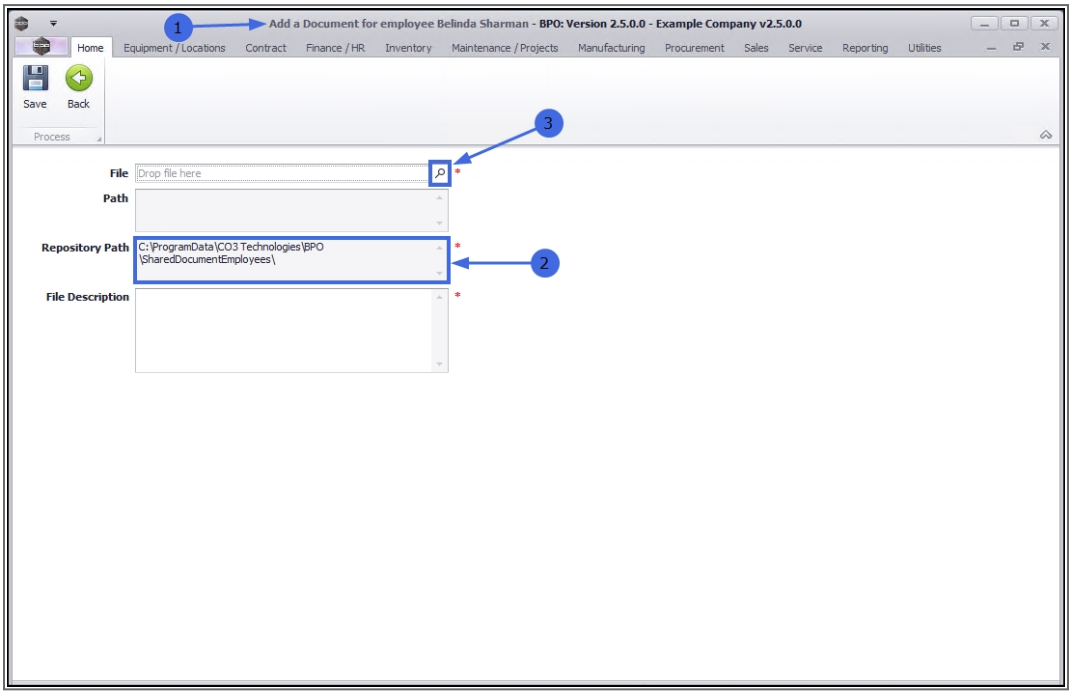

SELECT FILE

1. From the ***Select File*** pop up screen,
2. Find the ***file*** on your ***server / computer*** that you wish to ***link***.
    - Ensure that the document name appear in the ***File name:*** field by clicking on the document to select it.
3. Click on ***Open***.

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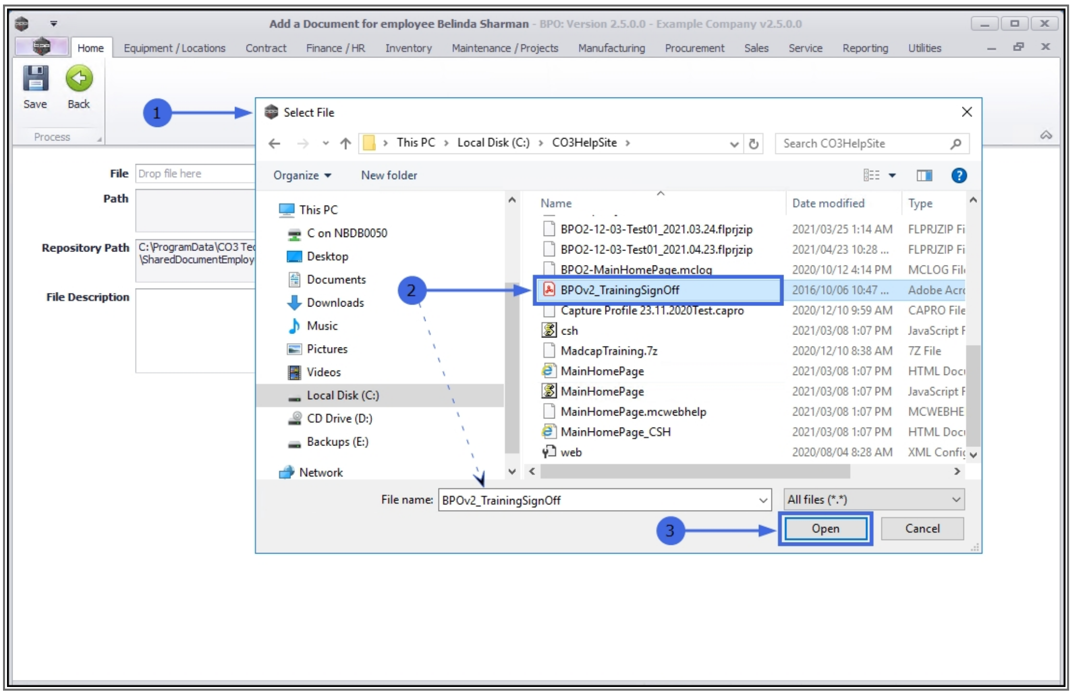

DOCUMENT DETAILS

1. The ***File*** and ***Path*** fields will now populate with the details of your selected document.
2. Type a ***description*** of the attached the document in the ***File Description*** field.

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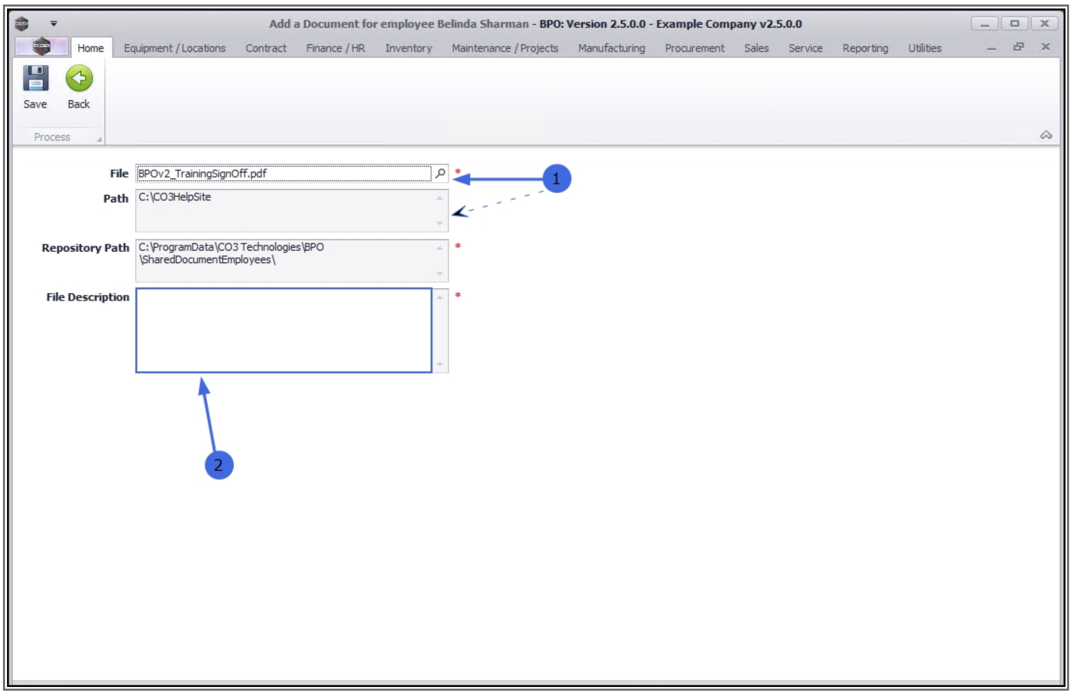
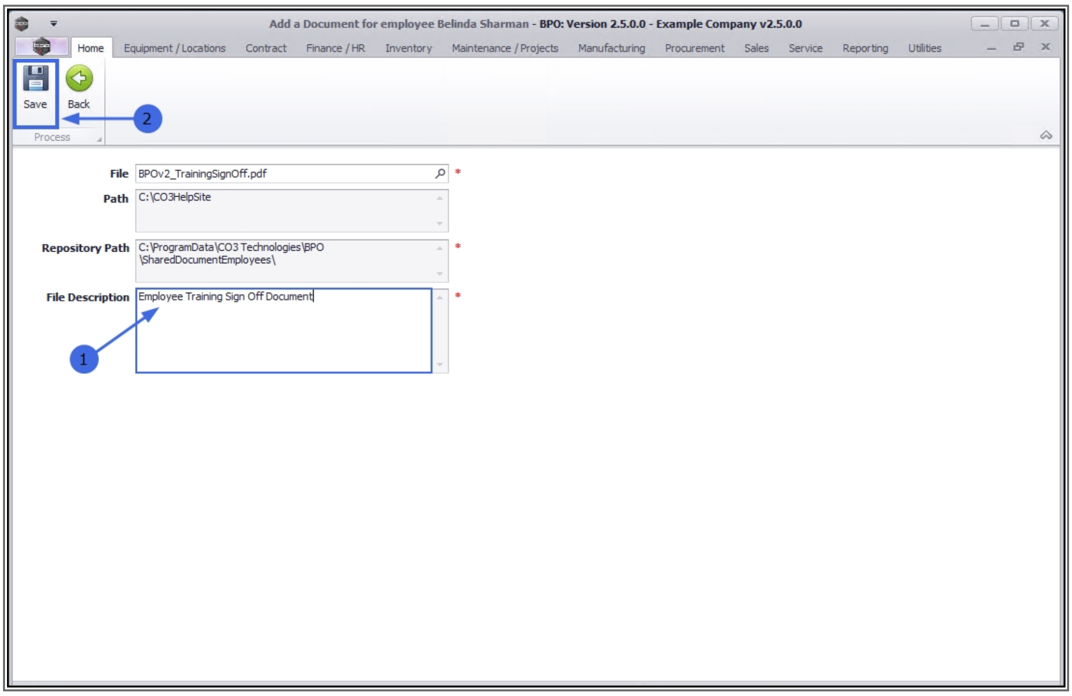


SAVE DOCUMENT

1. When you have added the ***File Description***,
2. Click on ***Save***.



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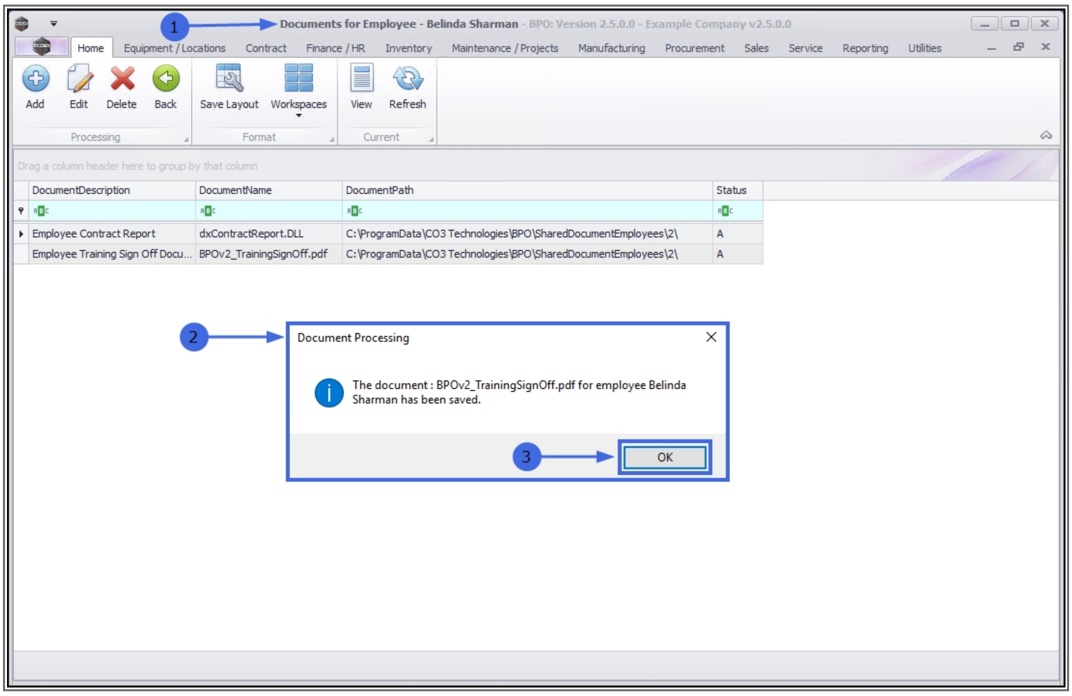
1. You will return to the ***Documents for Employee - []*** screen.
2. A ***Document Processing*** message box will pop up, advising the following:
    - *The document: [] for employee [] has been saved.*
3. Click on ***OK***.



VIEW ADDED DOCUMENT

1. You can view the added document in the data grid.
2. Click on ***Back*** to return to the ***Employees*** listing screen.

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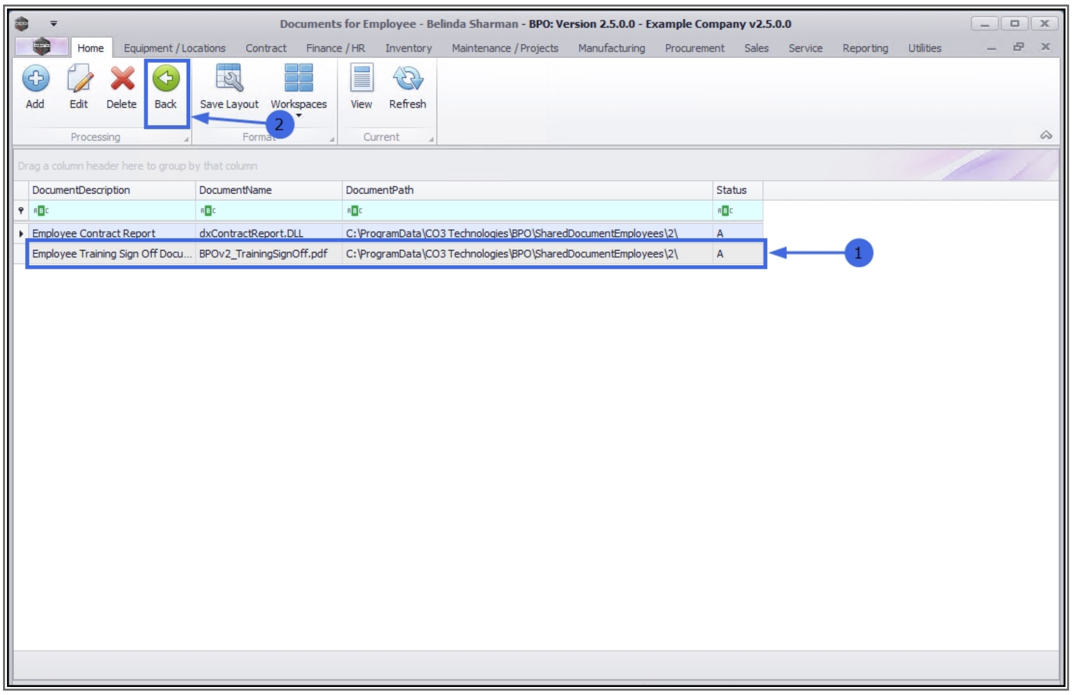

EDIT EMPLOYEE DOCUMENT

SELECT EMPLOYEE

1. In the ***Employees*** listing screen,
2. Select the ***row*** of the employee whose document you wish to ***edit***.
3. Click on the ***Documents*** tile.

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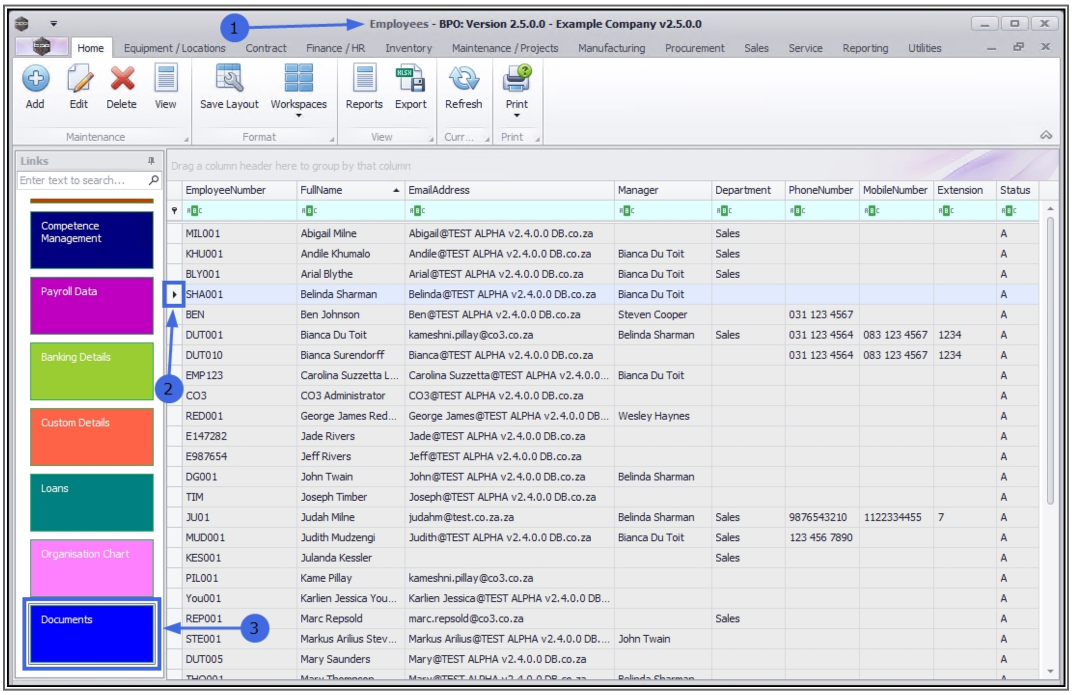

1. The ***Documents for Employee - []*** screen will open.

SELECT DOCUMENT

2. Select the ***row*** of the document where you wish to make changes.
3. Click on ***Edit***.

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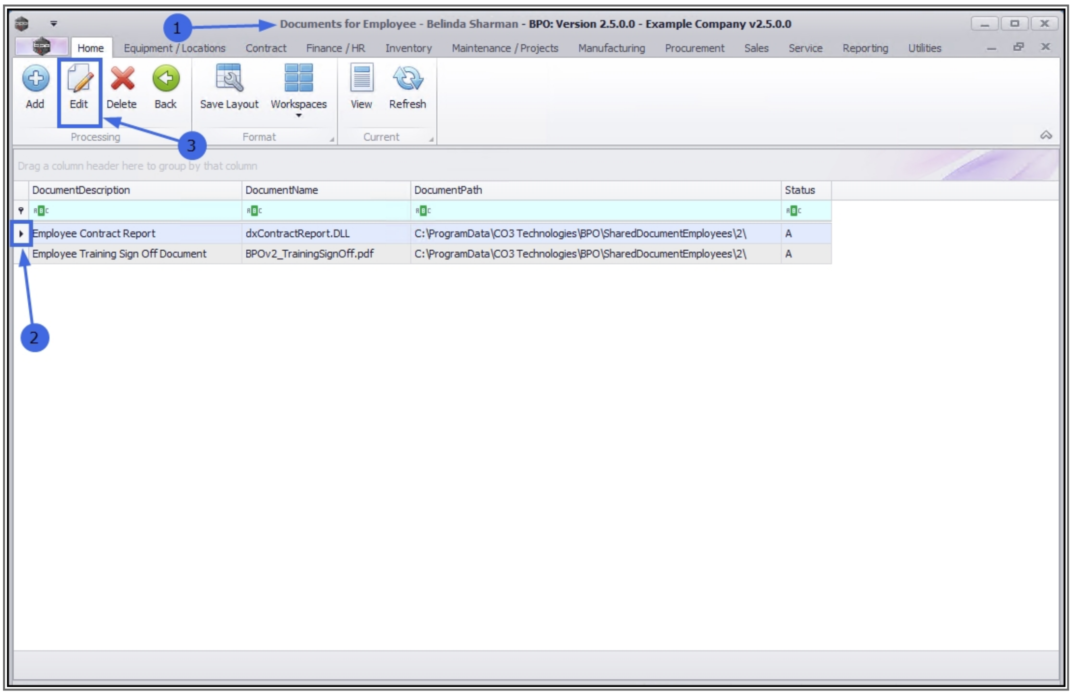
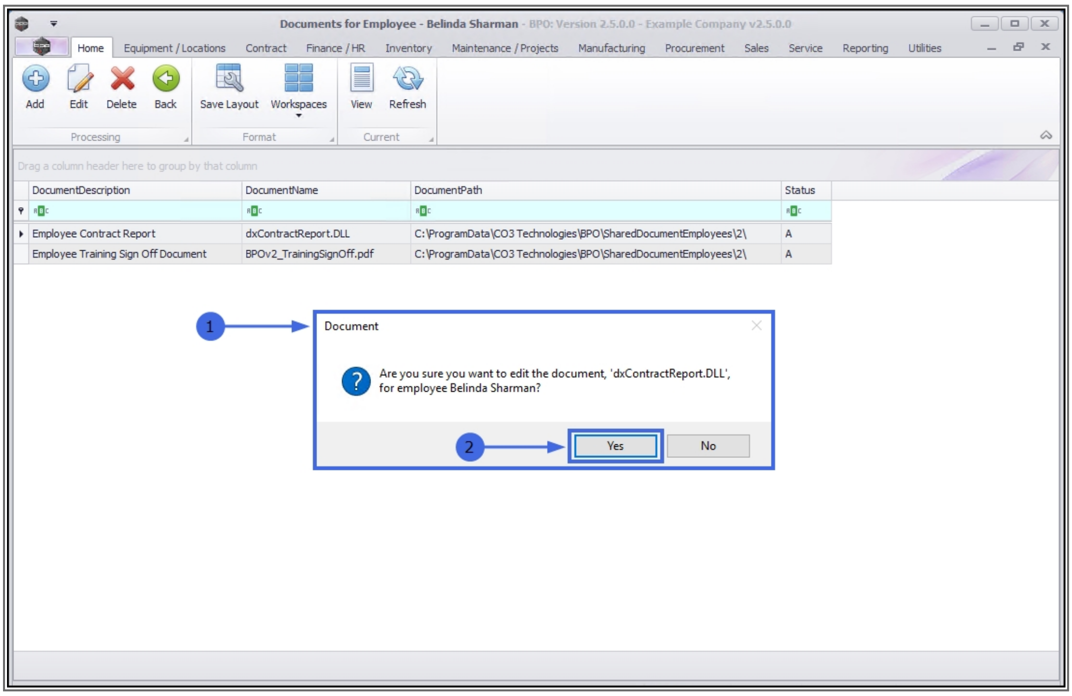


1. A ***Document*** message box will pop up with the following prompt:
   - *Are you sure you want to edit the document, '[]', for employee []?*
2. Click on ***Yes***.



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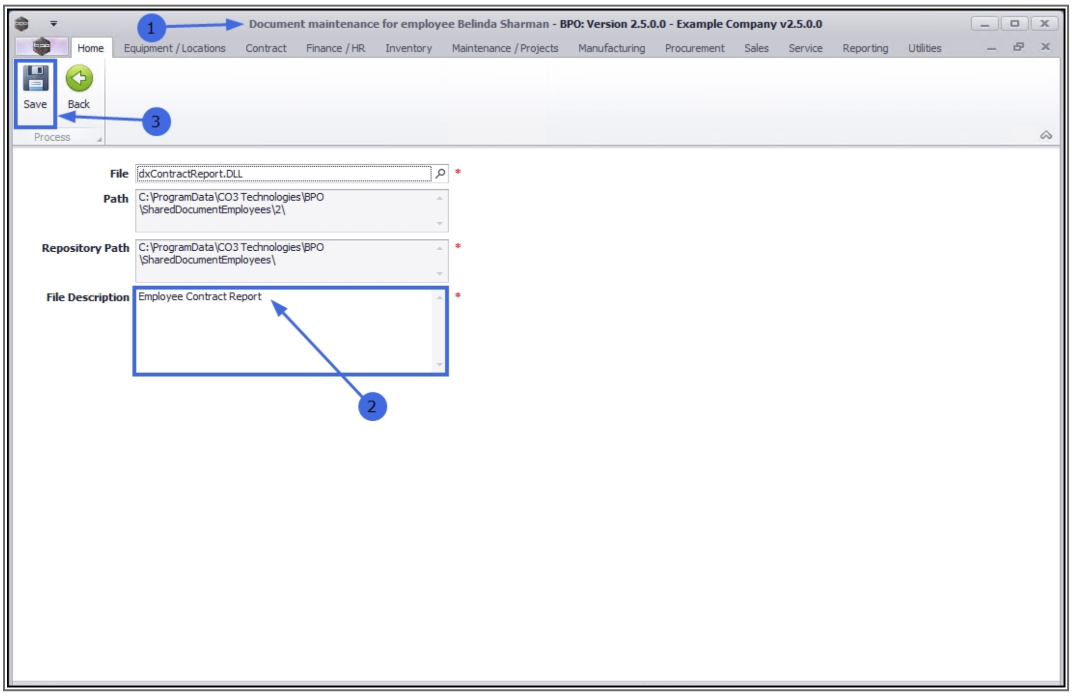
EDIT DOCUMENT DETAILS

1. The ***Document Maintenance for employee []*** screen will open.
2. Makes the changes to the relevant fields, as required.
   - In this example, the ***File Description*** is to be edited.

SAVE EDITED DOCUMENT

3. Click on ***Save***.



1. You will return to the ***Documents for Employee - []*** screen.
2. A ***Document Processing*** message box will pop up advising the following:
   - *The document: [] for employee [] has been saved.*
3. Click on ***OK***.

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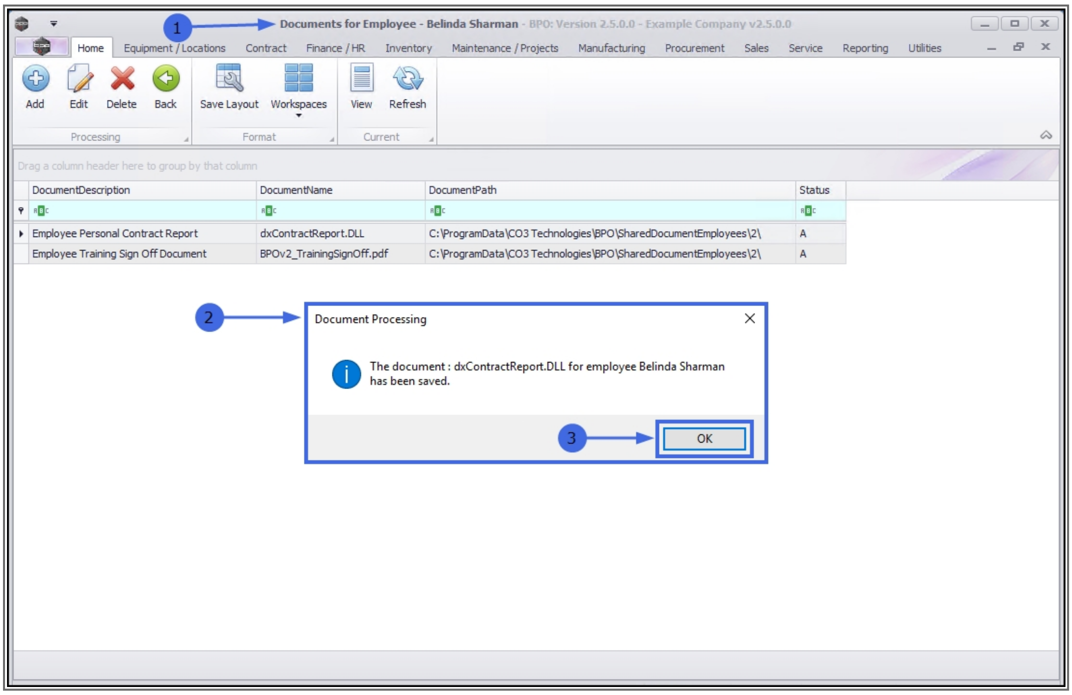

VIEW EDITED DOCUMENT

1. You can view the changes made to the document ***details*** in the data grid.
    - In this example, the ***Document Description*** column now displays the changes made in the previous screen.
2. Click on ***Back*** to return to the ***Employees*** listing screen.

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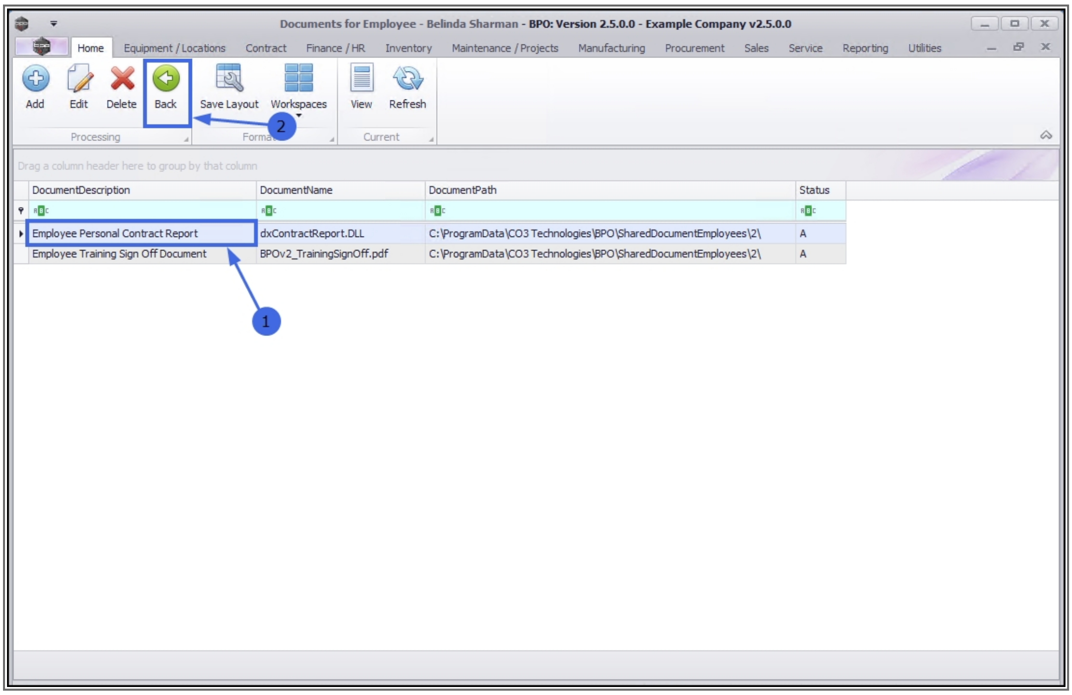

DELETE EMPLOYEE DOCUMENT

1. In the ***Employees*** listing screen,

SELECT EMPLOYEE

2. Select the ***row*** of the employee for whom you wish to delete a digital document.
3. Click on the ***Documents*** tile.

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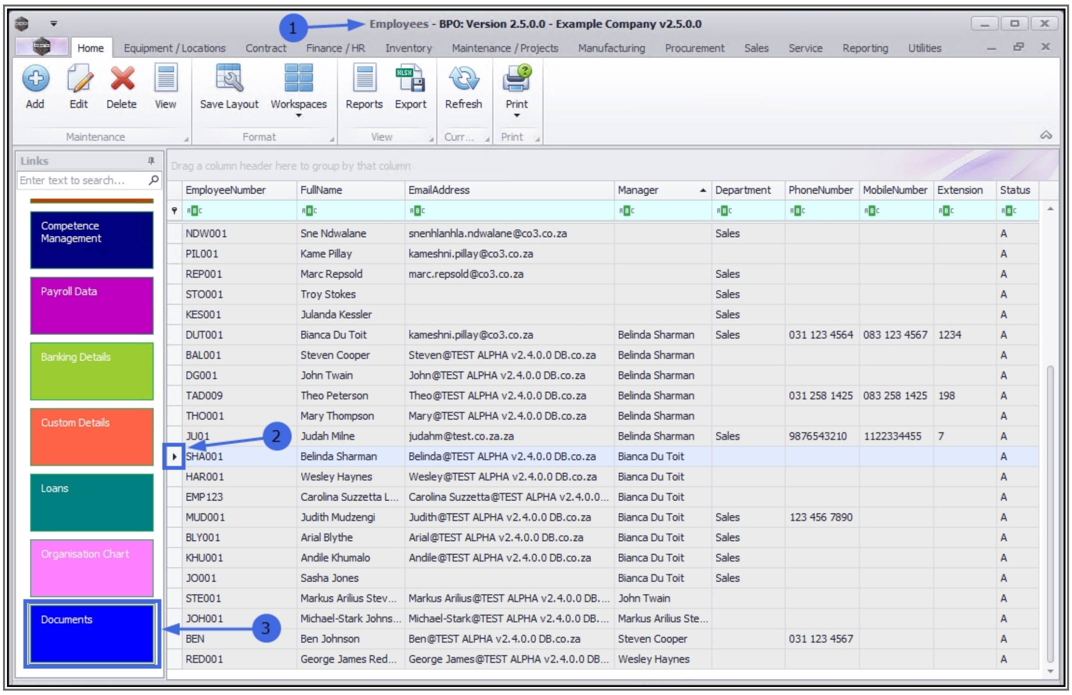

1. The ***Documents for Employee - []*** screen will open.

SELECT DOCUMENT

2. Select the ***row*** of the document that you wish to remove from the data grid.
3. Click on ***Delete***.

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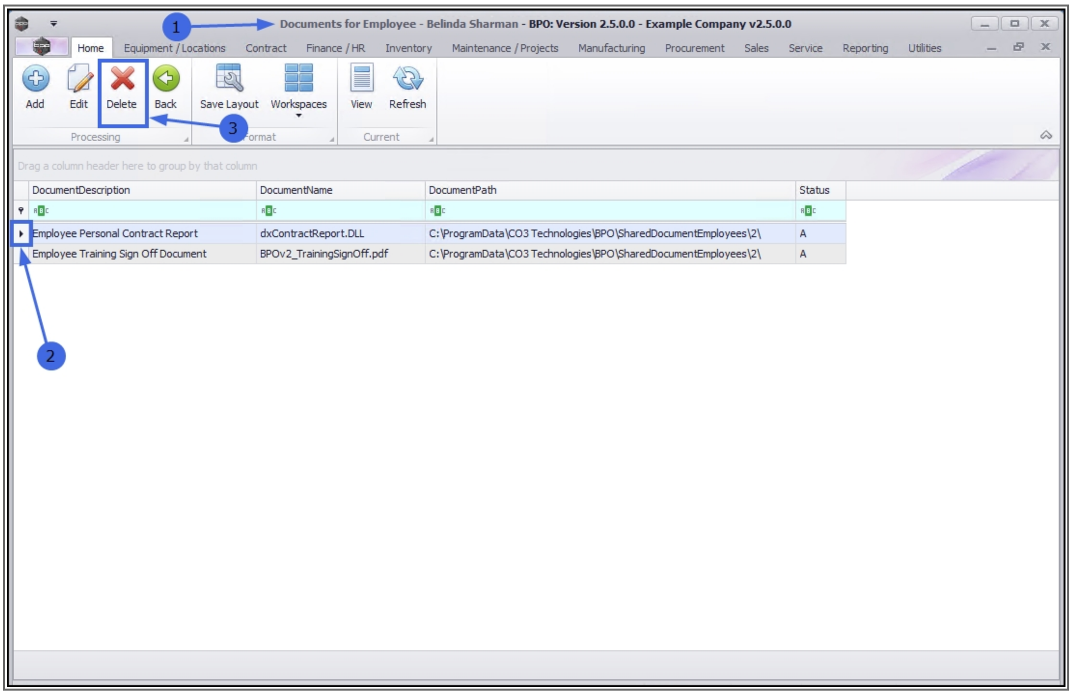

1. A ***Delete Document*** message box will pop up with the following prompt:
    - *Are you sure you want to remove this document, '[]', from employee []?*
2. Click on ***Yes***.

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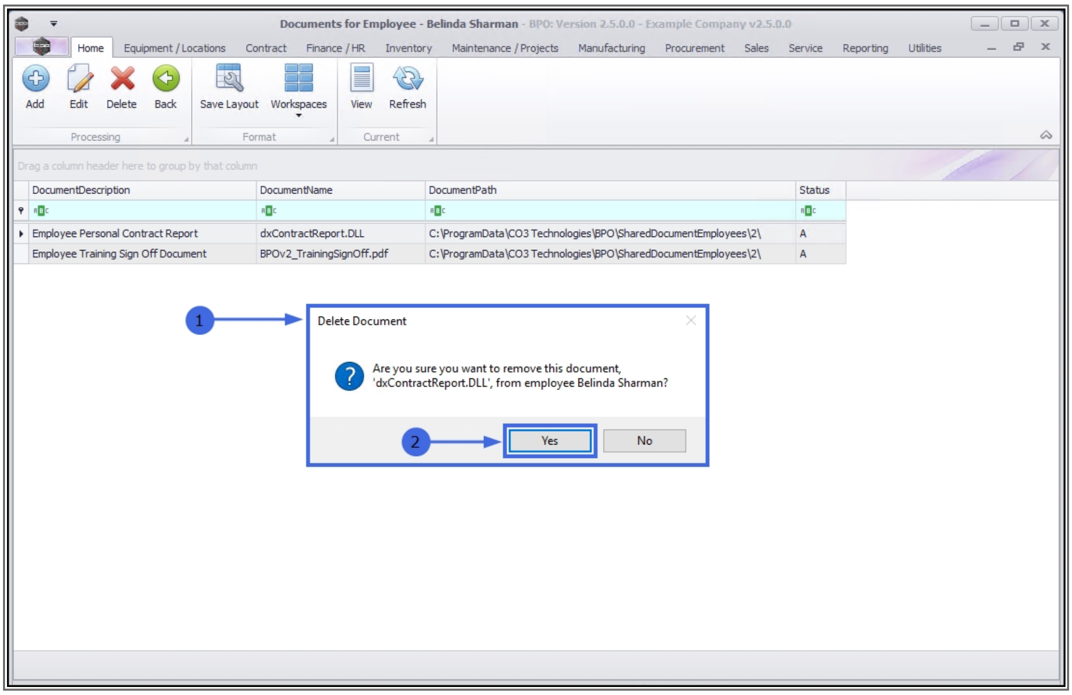
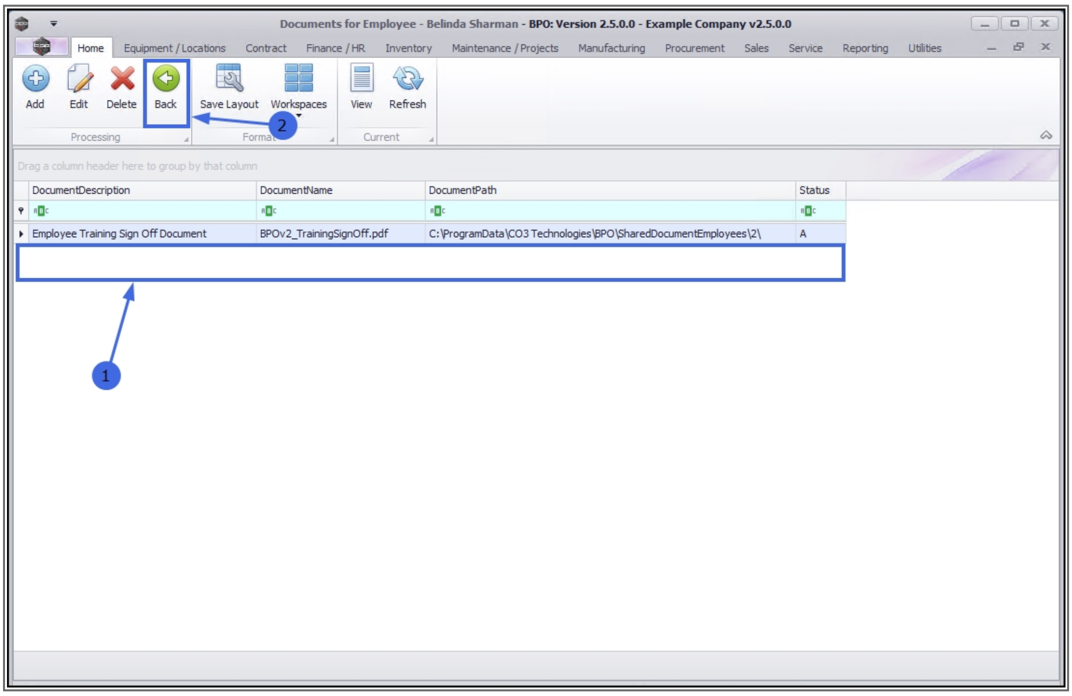


1. The selected document will be ***removed*** from the data grid.
2. Click on ***Back*** to return to the ***Employees*** listing screen.



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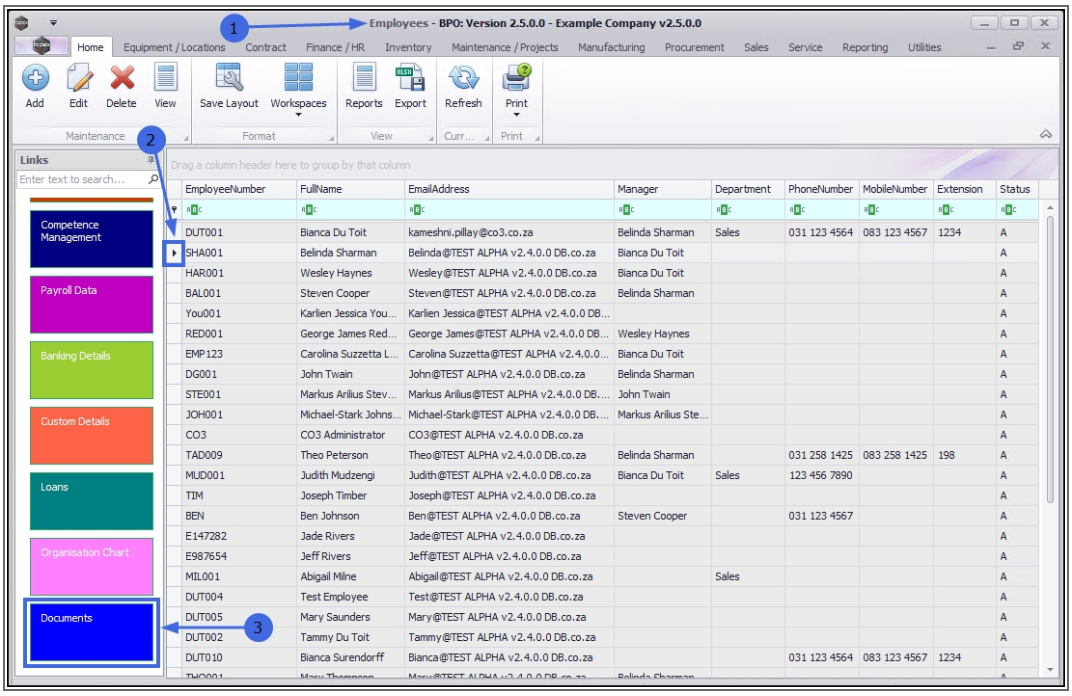
VIEW /OPEN EMPLOYEE DOCUMENT

SELECT EMPLOYEE

1. In the ***Employees*** listing screen,
2. Select the ***row*** of the employee whose document you wish to ***open*** and ***view***.
3. Click on the ***Documents*** tile.



1. The ***Documents for Employee - []*** screen will open.

SELECT DOCUMENT

1. Select the ***row*** of the document you wish to open and view.
2. Click on ***View***.

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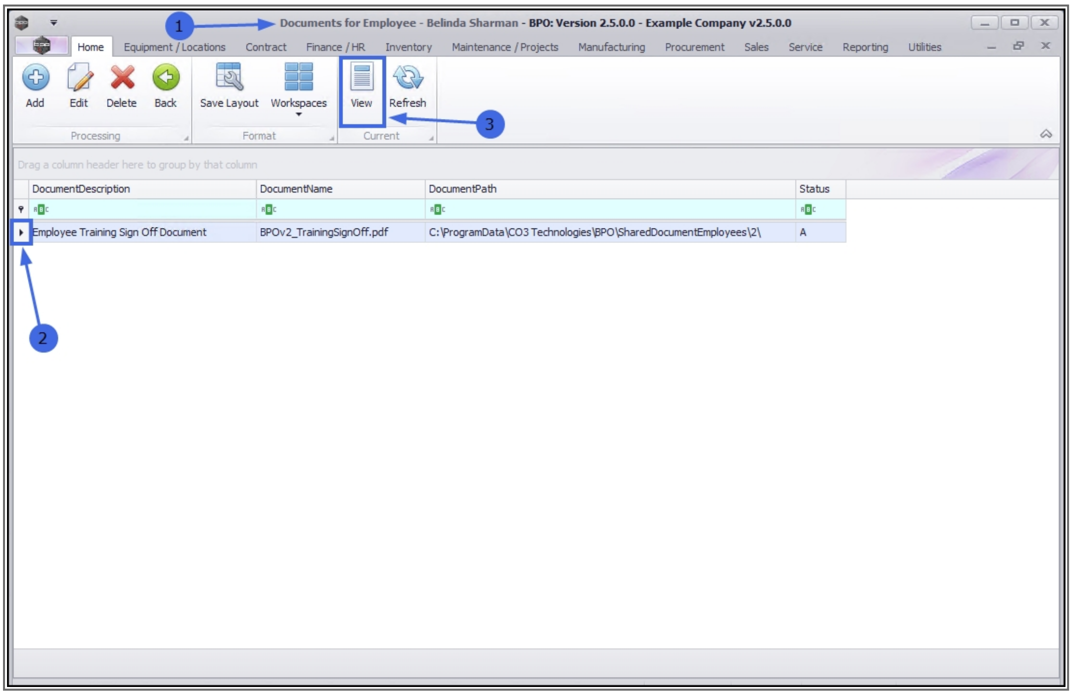

VIEW DOCUMENT CONTENTS

1. The document will open with the relevant program, e.g. a **pdf** will open in ***Adobe Reader***, a ***Word*** document will open the ***Microsoft Word*** application (if installed on your PC).
2. ***Close*** this screen to return to the ***Documents for Employee - []*** screen.

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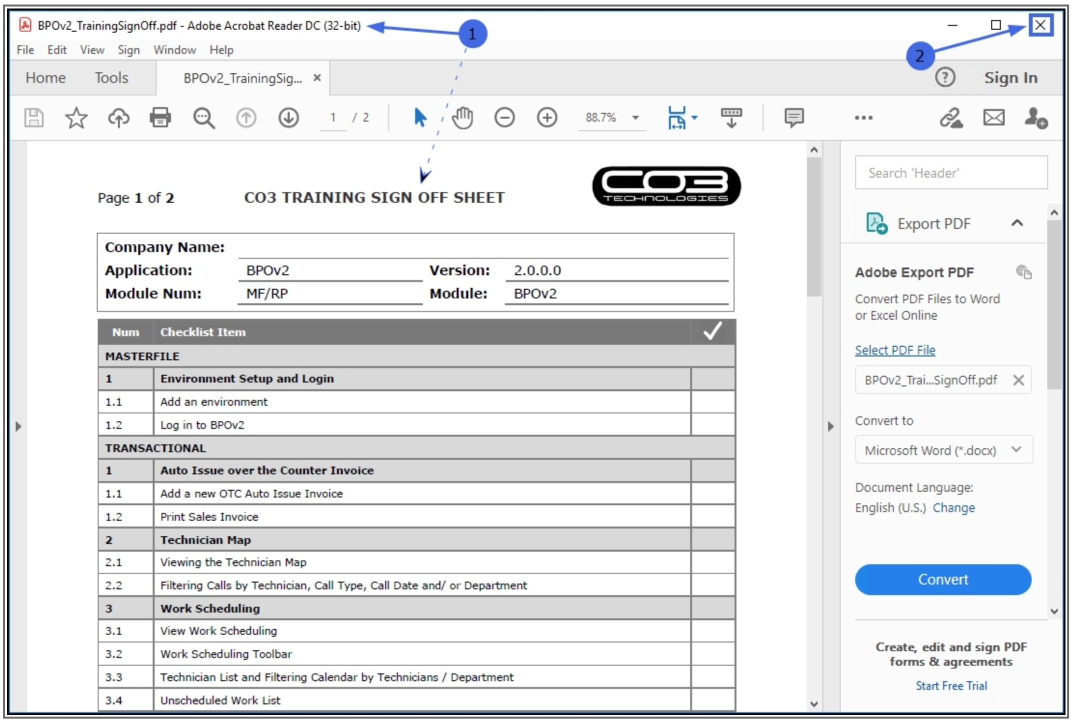

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