

# Manager - Accessing Your Team Members' Employee Files

## Accessing Your Team Members' Employee Files

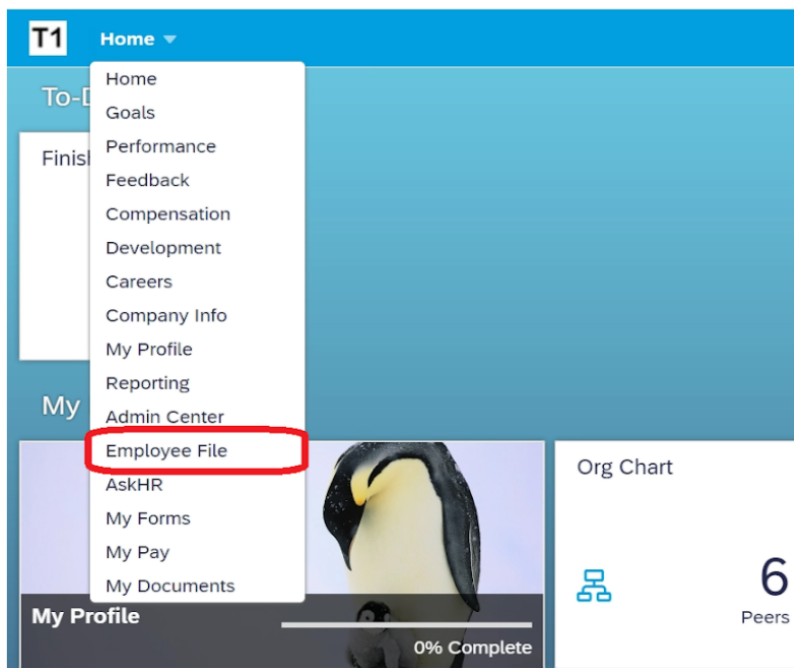
### INTRODUCTION

The Employee File workspace enables Managers to access the documents of the employees in their management line.

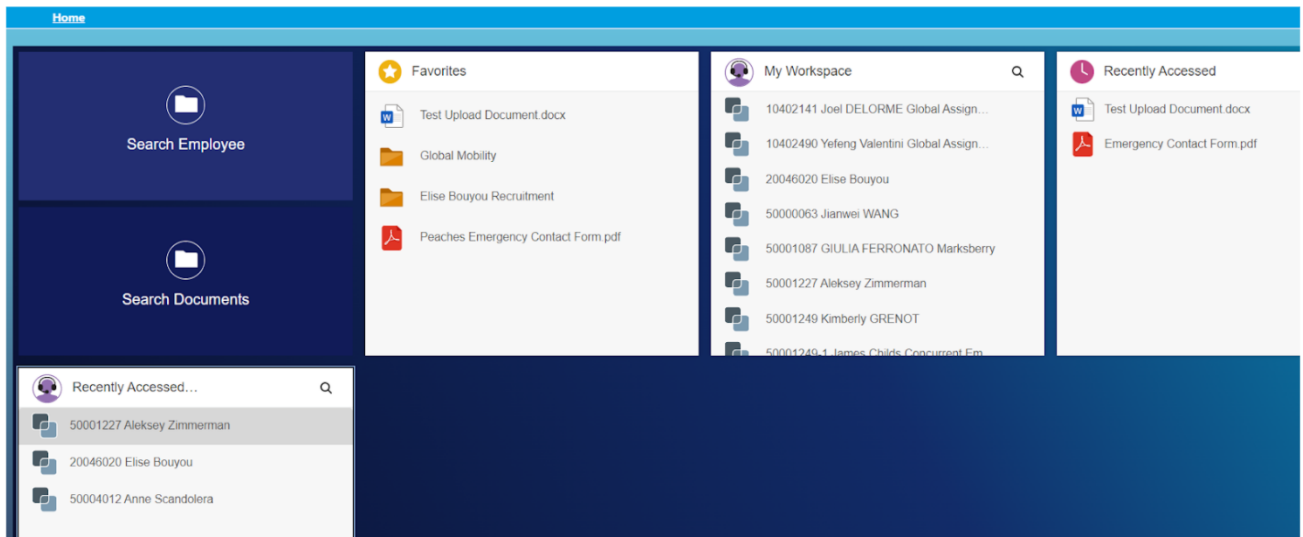
To access the Employee Files of those in your management line, select "Employee File" from the Home drop-down menu of My HR Services.

For detailed information about accessing your own personal Employee File workspace and how to use the available functions, please [click here](#).

**Please note that Bulgaria and Russia are out of scope.**



This will lead you to the Employee File Workspace as shown below. Here you can search for an employee, search for a document, view Favorites, and see the most recently accessed employee files and documents.



## INFORMATION ON WHAT CONTENT YOU CAN ACCESS AS A MANAGER

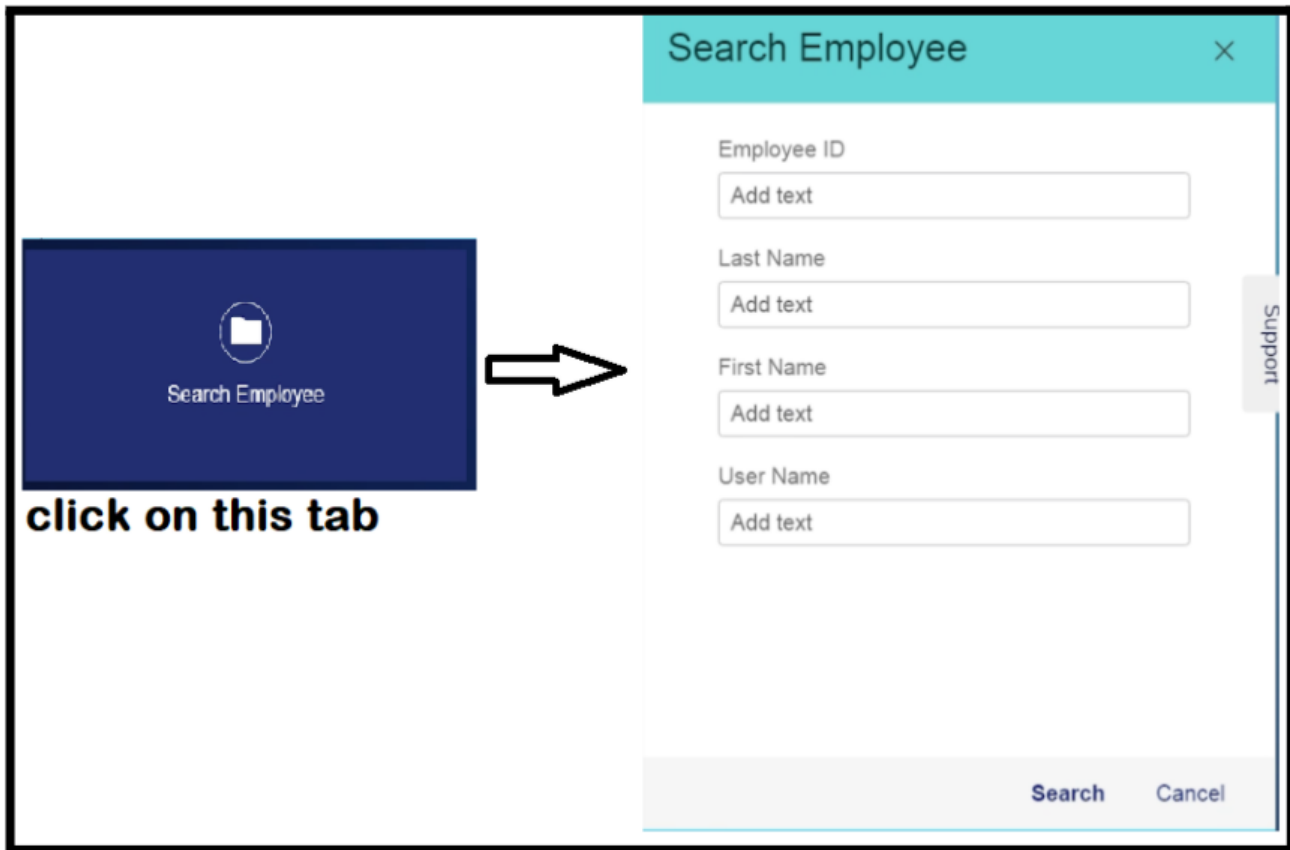
Folders		
Main Folder	Sub Folder	Description
Recruitment	Candidate Documents	Documents related to the candidate's profile for the position and professional qualifications
Payroll and Compensation	Compensation	
Performance Management	Performance Assessment	All types of performance reviews or assessments
	Discipline & Improvement Plans	Official communication to the employee when performance and/or behaviors are not in line with expectations.
Learning & Development	Development Plans	Includes career development and skill building plans.
	Training Records	Documents showing the training history of the employee and related certifications.

## SEARCH FUNCTIONALITY

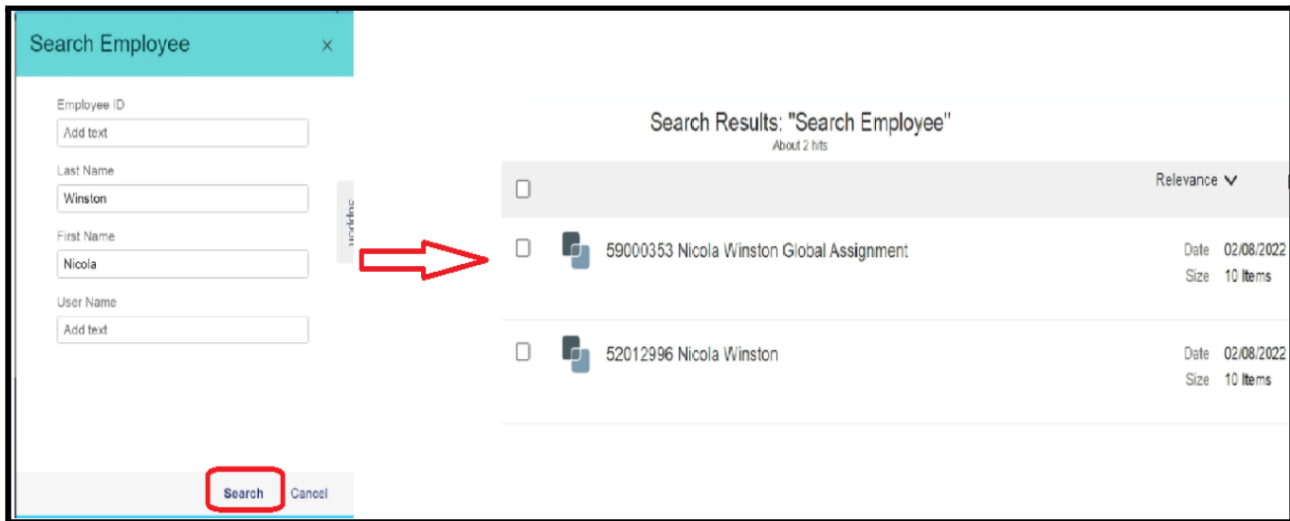
This can be used to locate the file of a specific employee or to locate specific documents.

- **Search Employees**

You can search for an employee's file using Employee ID, Last Name, First Name or User Name as shown below.



- In the Search for Employee dialog, you must specify at least one search criteria.
- Click the Search button at the bottom right and it will take you to the Search Result page as shown below.
- You are able to further refine your search by completing open fields in the box on the left.

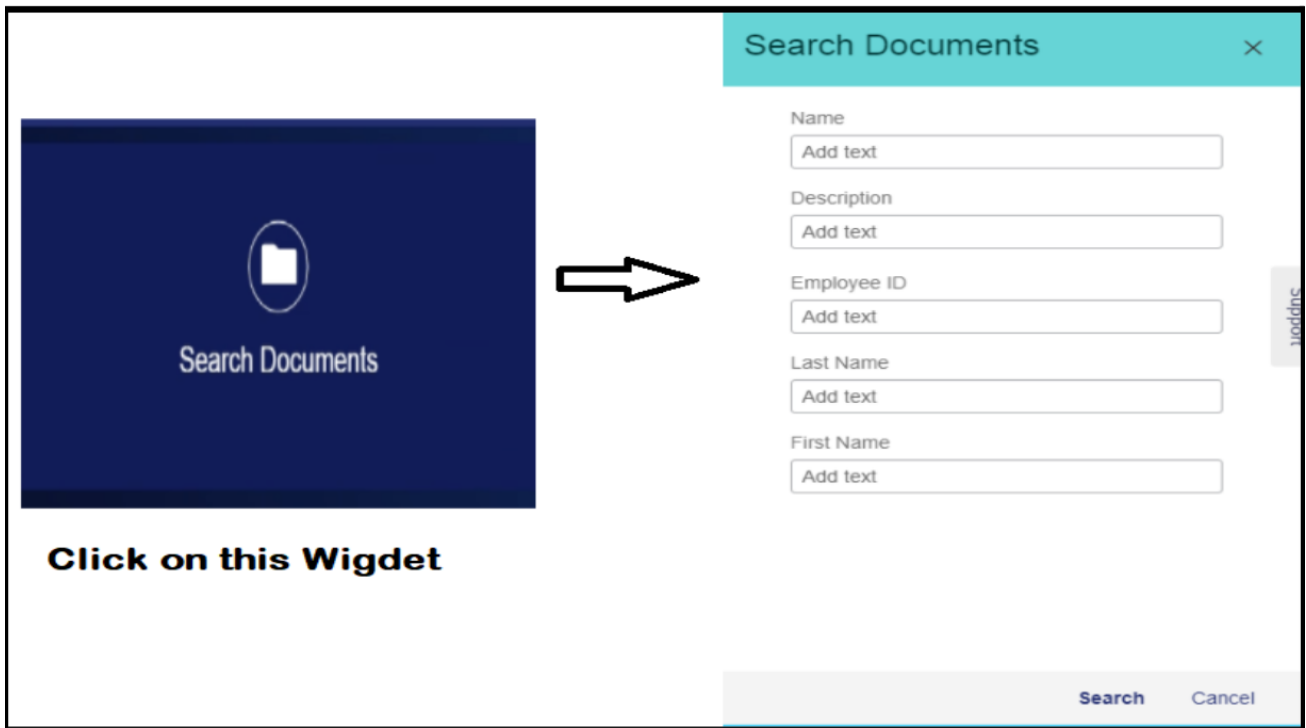


### • Search Documents

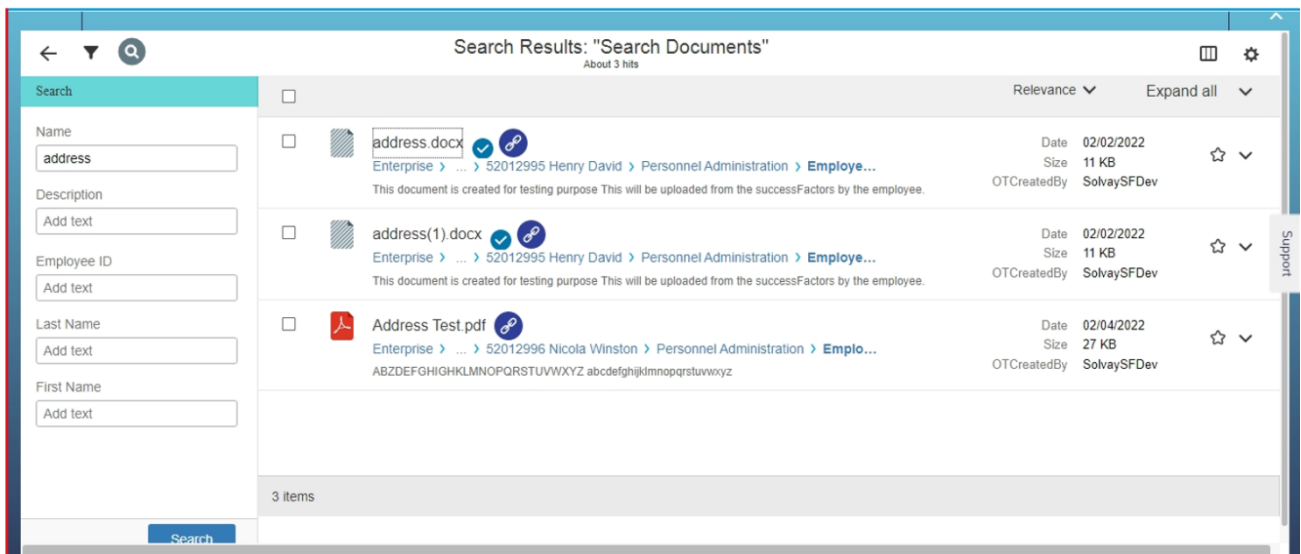
You can search for a particular document of an Employee using the available fields in the search box and then selecting the Select button at the bottom right corner of the screen.

- Name: This searches based on the name of the document and works with one or multiple words used in the name.

- Description: If a document received a description upon upload, you can search using a keyword from this description.
- Employee ID, Last Name, and First Name enable you to search for all documents associated with the criteria you enter in one of these fields.



- You are able to further refine your search by completing open fields in the box on the left.



- This highlighted part below is the storage path of the document. From here you can identify to whom this Document belongs to and where in the folder structure it is stored. To see the full path you can reduce the zoom level by clicking ctrl - and can enlarge by clicking ctrl +.

In this example, the document belongs to Nicola Winston and it is stored in the Personnel Administration folder.



Address Test.pdf

Enterprise > ... > 52012996 Nicola Winston > Personnel Administration > Emplo...

ABZDEFGHIGHKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz



- Click on the Tabular Search View icon to change the view as shown here:

Search Results: "Search Documents"  
About 3 hits

Relevance ▾

<input type="checkbox"/>		Name	Date	Size	Location	
<input type="checkbox"/>		address.docx	02/02/2022	11 KB	Employee Personal ...	▾
<input type="checkbox"/>		address(1).docx	02/02/2022	11 KB	Employee Personal ...	▾
<input type="checkbox"/>		Address Test.pdf	02/04/2022	27 KB	Employee Personal ...	▾

- Click on the above highlighted icon to revert back to Standard Search view.
- By Clicking on this You can add the associated document to your Favorites Widget.
- To view the official Record Details of a particular document, click on the icon . It will open the detail page as shown below.

← Search Results

address.docx ▾

address.docx Properties ▾ General **\*Records Management**

address(1).docx

Address Test.pdf

Records Management Only required fields (\*)

RM Classification	File number	RSI	Primary
Test Address	1	ADDRESS-RSI	

\*Record Date 01/27/2022 Storage Medium ELECTRONIC..ELECTRONIC

Record Type No value Accession No value

\*Status ARC..ARCHIVED Subject (no value)

\*Status Date 01/27/2022 Author or Originator No value


Received Date No value Addressee(s) (no value)

\*Essential NON\_ESSENTIAL..NON\_ESSEN... Other Addressee(s) (no value)



- This icon indicates that the document has been uploaded directly from Success Factors.

## FAVORITES

- This is a place where you can store documents and folders for quick access. To mark as a favorite, click on . A pop-up will be displayed enabling you to change the name of the favorite if you wish. There is no limit to the number of items you can mark as "favorite."

## MY WORKSPACE

- This section contains the personal workspaces for all the employees in your management line. From here you can open the employee's file.

## RECENTLY ACCESSED

- This section provides a list of the documents recently viewed by you. It will display up to 25 of the most recently viewed documents.

## RECENTLY ACCESSED WORKSPACES

- This section provides a list of employee files recently viewed by you. There is no limit defined to the number of objects in this list.