

# HR - Accessing Employee Files in My HR Services

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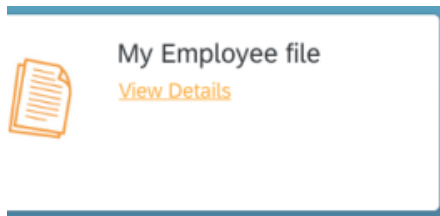
### INTRODUCTION

Employee File workspace enables Human Resource professionals to access and manage the documents of the employees in their scope. Please note that due to legal constraints, Bulgaria and Russia are out of scope.

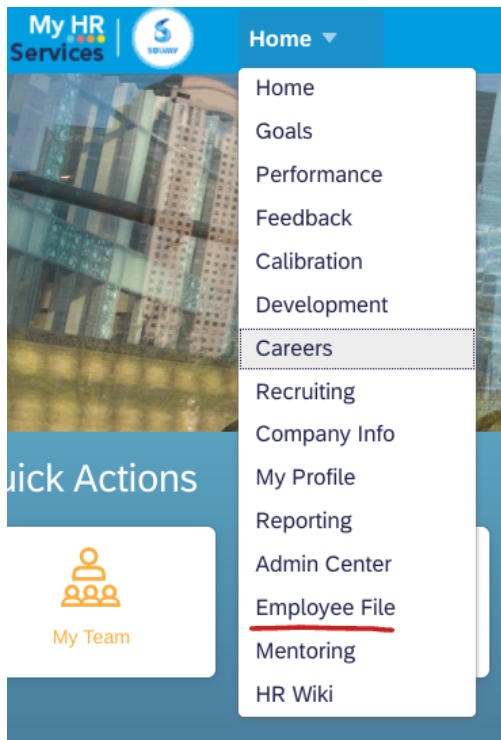
### ACCESSING THE EMPLOYEE FILE WORKSPACE

Employee file access is open to Employees, Managers and HR professionals. Your HR access to the Employee Files is based on your role in HR and

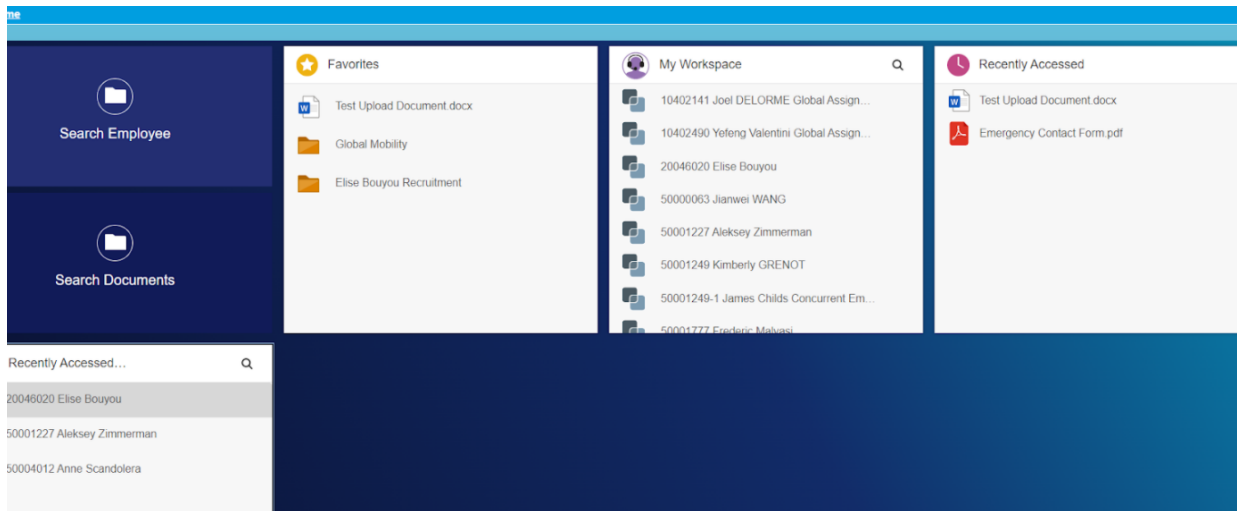
Employee File tile in My HR Services will lead you to your own workspace.



To access Employee files for employees in your scope click on Employee File item in the Home menu:



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 view employee documents for those in your scope. This space also displays recently accessed employee files and documents.



Identify any issues, have any questions or need general support, please either submit a request through [ServiceOne](#) or call our HR Operations team.

## DOCUMENT FOLDER STRUCTURE

Documents are organized by main categories and sub-categories. Simply click on the folder to open and see what documents are inside.

Folder	Sub Folder	Description	Document Examples
Benefits	Health and Welfare benefits	Documents related to Health and Welfare benefits provided to the employee and their family.	Health Insurance Forms, Short or Long term Disability, Life Insurance, Meal Allowances, Company car, Participation in Langzeitkonto (DE), Usage of tariff related benefits (Zukunft's Beitrag) (DE), etc.
	Retirement benefits	Documents related to the different types of pension funds and retirement benefits/plans.	Pension fund letter leaver/retiree , Pension fund leaver/retiree calculation, 401k, Seniority Jubilee (calculation), Pension Schemes/Program, Participation in PKDW, AFORE Document, Individual liquidation statement - (pre)retiree and leaver, etc.
Employment	Agreements & Packages	Documents containing all the information about expatriation.	Secondment Agreement, Assignment Extension, Assignment Termination, Remuneration Package, Cost of Living Calculations, etc.
	Administrative Documents	Documents about tax administration for expats:	Reports on Taxes & Deductions etc.
Employee Development	Development Plans	Includes career development and skill building plans.	
	Training Records	Documents showing the training history of the employee and related certifications.	
Financial and Compensation	Payroll Forms & Documents		W4, W2, annual tax statements, local bonuses, recurrent deductions, garnishment, etc.
	Compensation		Compensation statements, promotion statements, bonuses, long term incentive
Performance Management	Performance Assessment	All types of performance reviews or assessments.	
	Feedback	Feedback received by the employee from others in the organization.	
	Discipline & Improvement Plans	Official communication to the employee when performance and/or behaviors are not in line with expectations.	Performance improvement plans, disciplinary letters, praises etc.
Personal Information	Employee Personal Documents	Documents that contain information about the employee and their dependents and are needed to maintain employee data across several HR systems for several purposes, such as permissions, check-ups etc	Copies of passport, national ID card, driver's license, Work Permit/Immigration Forms, Security Clearance documents, Form I-9, Religious orientation, birth certificate, marriage certificate, verification of employment, certificate of salary and employment status/contract type, Proof of Address, bank account, RFC, CPF (Cadastro de Pessoas Físicas or Natural Persons Register), CURP, etc.

	Company Issued Documents & Agreements	Documents that include information relating to the employment and employment contract of an employee, as well as several acknowledgements and declarations signed by the employee.	Labour contract, Offer letter, Confidentiality Agreement, non-competition agreement, Letter of Assurance, Labour book, NDA Agreement, GDPR declaration, Industrial Agreement acknowledgment, Acceptance of the collective accident insurance, Confirmation acceptance work regulations, Declaration for received documents such as Code of Business integrity, Safety procedures, etc
	Medical	Documents containing medical related information that is NOT maintained by HSE.	Hiring / Leaving Medical Clearance Form, Medical accommodation, Medical certificate
	Union Documentation	Documentation related to union topics that is employee specific.	Arbitrations / Grievances
<b>Document</b>	Candidate Documents	Documents related to the candidate's profile for the position and professional qualifications.	CV and Application, assessment results, recommendation letter, School Diploma /Degree, licences etc.
<b>Document</b>	Absence & Attendance Related Documents	Documents that are needed to justify/approve absences paid or unpaid.	Absences related to sickness, work accident, parental leave, furloughs, disciplinary, strike, etc.

## RKSPACE FUNCTIONALITIES

### • Content & Access Rights for HR

Content you can see and the actions you can take with content varies based on your HR role.

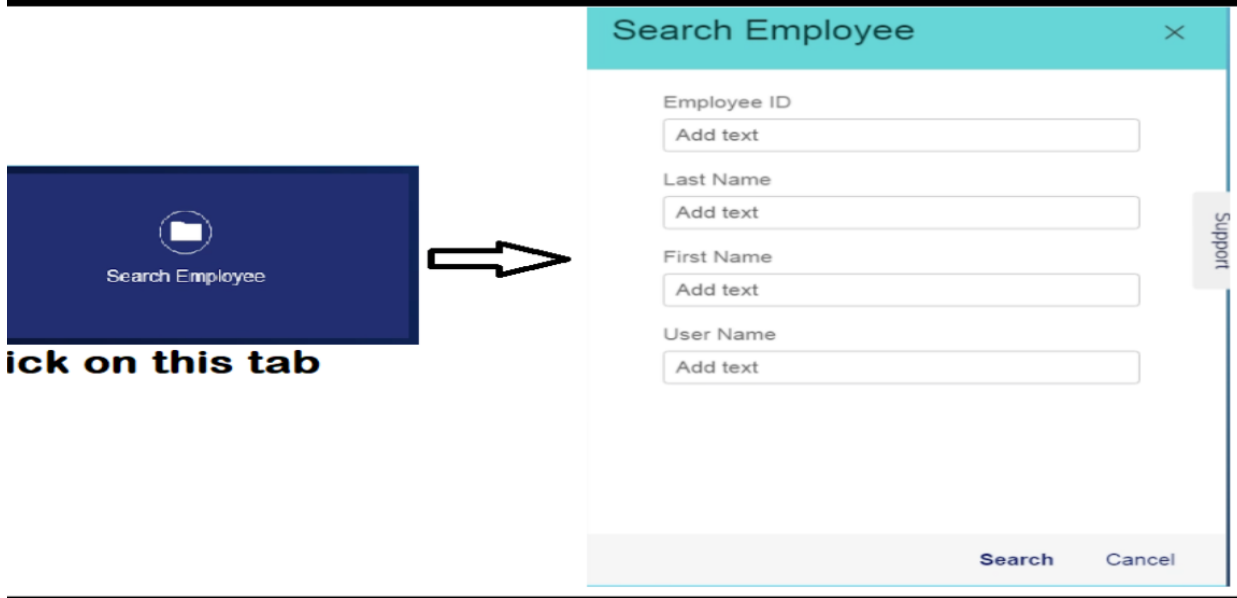
	Site HR/ Country HR/HR	HR Payroll	HR OPS	SBS - Rec
<b>DER</b>				
<b>Benefits and Pension</b>			View, Write, Delete /Legal Hold/Modify	
and Welfare benefits				
ent benefits				
<b>Mobility</b>		View, Write & Delete		
ents & Packages				
strative Documents				
<b>Learning and Development</b>				
oment Plans	View, Write & Delete	None		
g Records				
<b>Forms and Compensation</b>		View, Write & Delete		
Forms & Documents				
nsation				
<b>Performance and Talent Management</b>				
erformance Assessment				
ick	None	None		
ne & Improvement Plans				
<b>HR Administration</b>				
ee Personal Documents				
ny Issued Documents & Agreements				
l				
ocumentation	View, Write & Delete	View, Write & Delete		
<b>Document</b>				
ate Documents				
<b>Attendance Management</b>				
e & Attendance Related Documents			View, Write, Delete /Legal Hold/Modify	

### • Search Functionality

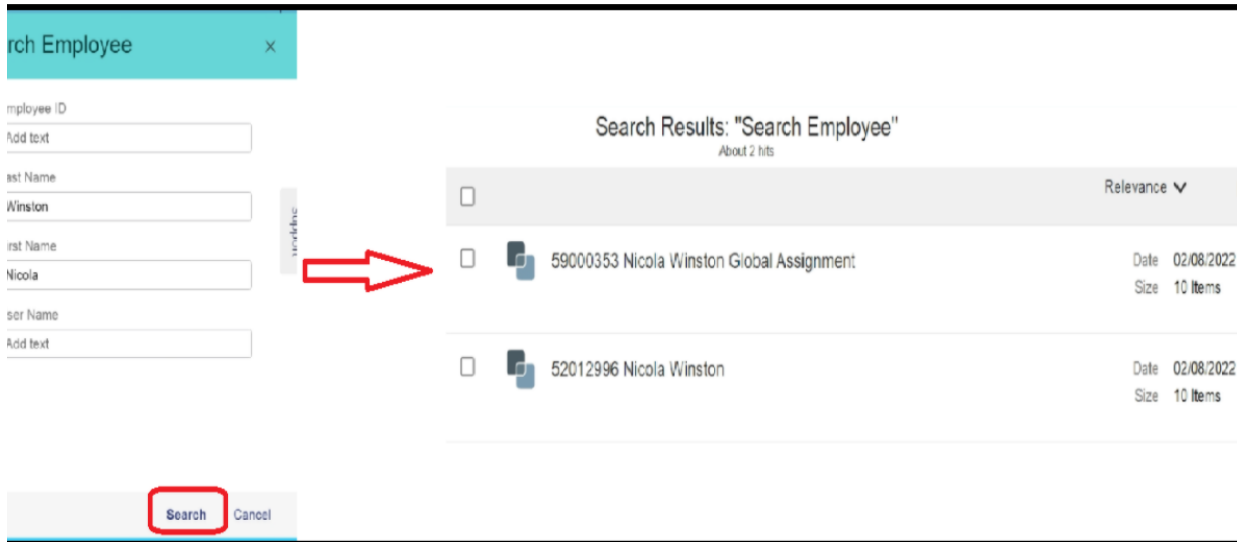
in be used to locate the file of a specific employee or to locate specific documents. As an HR you can access the Employee Files for all employees scope based on your authorization in SuccessFactors.

### ch Employees

in 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.



### ch Documents

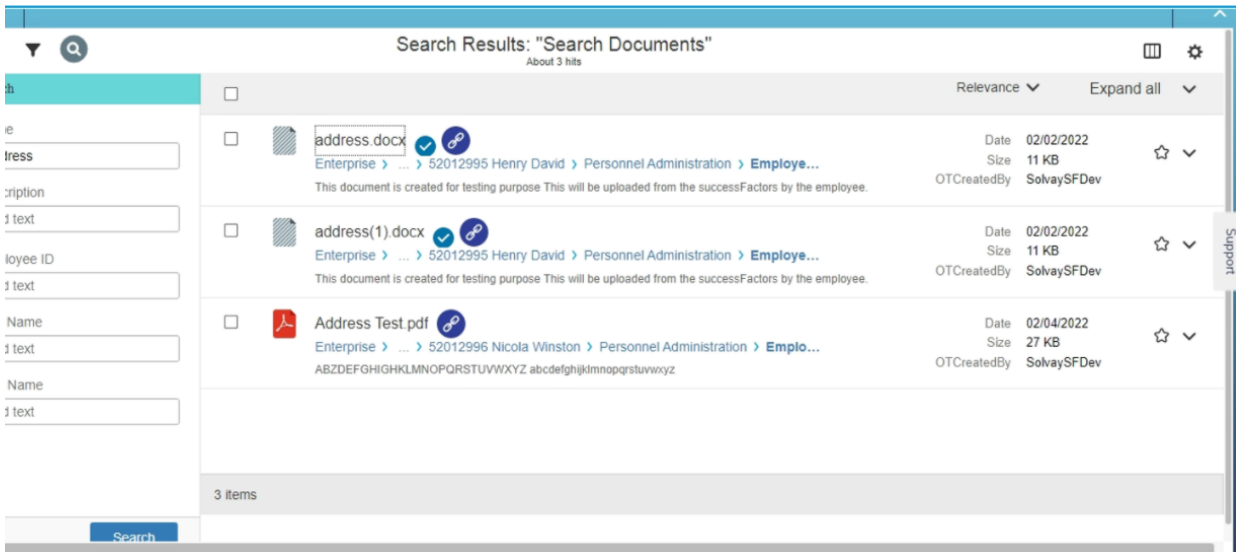
in search for a particular document of an Employee using the available fields in the search box and then selecting the Search button at the bottom corner of the screen.

- 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.



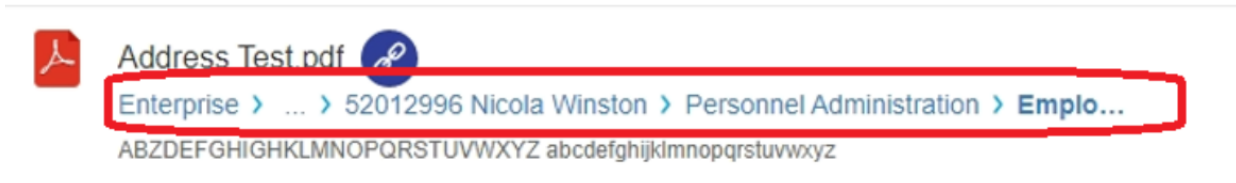
Click on this Widget

- 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 +.

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





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

Search Results: "Search Documents"  
About 3 hits

Name	Date	Size	Location
address.docx	02/02/2022	11 KB	Employee Personal ...
address(1).docx	02/02/2022	11 KB	Employee Personal ...
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 icon 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

Properties General **Records Management**

Records Management Only required fields (\*)

RM Classification	File number	RSI	Primary
Test Address	1	ADDRESS-RSI	<input checked="" type="checkbox"/>

\*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



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 scope. From here you can search for the employee and open the employee's

## • Recently Accessed

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

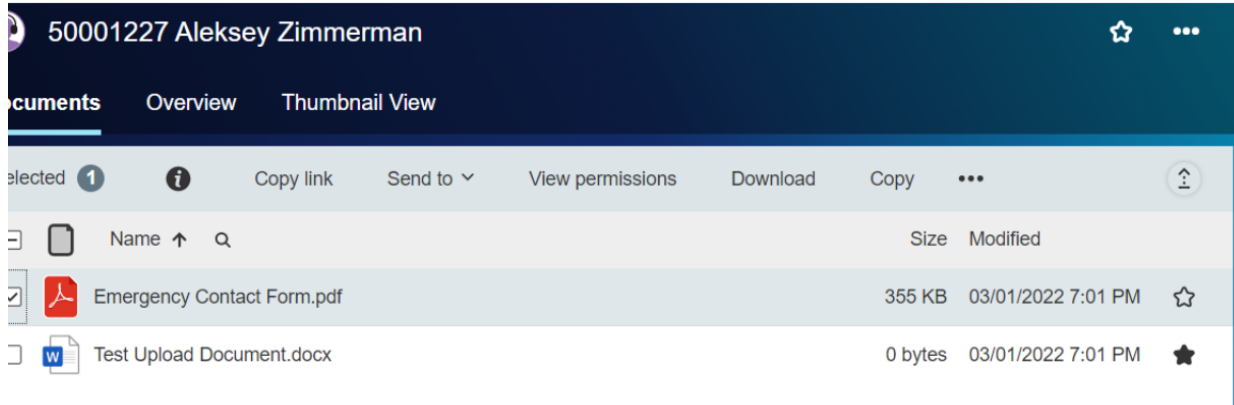
### • Recently Accessed Workspaces

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

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## HOW TO PERFORM ACTIONS WITH A DOCUMENT

When you select a document by checking the box to the left of the name, additional actions will be displayed just above. These are explained below.



- Displays the properties of the document.

**link** - Copies the link of the document to clipboard. You can share this link with others however it will only work for them if they have the relevant permissions.

**permissions** - Displays the permissions of the document.

**Download** - Can be used to download the document into your local system.

**Workflow** - GPP and SBS Service Teams should disregard as this feature is not operational for you.

**Send to/Mail as link** - Please disregard.

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## MULTIPLE ASSIGNMENTS

Employee can have one or multiple assignments assigned to them during the course of their career. There are two distinct types: Concurrent Assignment and Global Assignment. If an employee is in one or both of these categories, you can access the related documents for the assignment(s) in your scope as their HR. As HR Ops has global access they will always be able to see all assignments.

### • Concurrent Employment

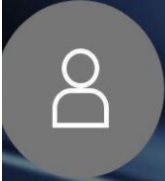
Concurrent employment is when an employee is assigned to more than one assignment at the same time. In such a case, the documents related to each assignment would be maintained separately.

Show a screenshot of the layout and folder structures.

DEV Employee Files

Search for actions or peo...

Actions As of Today

 Peter Parker (50201847) ▾

- Researcher/CTS ★  
Characterisation Lab (20226177)
- Administrative Assistant  
General Affairs (21355764)

SPEC-IN IVADODARA (2942) (IST)  
Local time: Thursday, 05:05:10 PM  
Position: Associate Research Scientist (21502551)  
Cost Center:  
R&I ST Analyt lab IN (2H14189007/CHEF)  
Employee Id: 50201847

PERSONAL INFORMATION ▾ EMPLOYMENT INFORMATION ▾ EMPLOYEE PROFILE IDS TALENT PROFILE ▾


Personal Information

Personal Information ✎ ⌂

Effective as of: Sep 7, 2021.


Support









he Employee File workspace of the individual and click on the “Concurrent Employment/Host Country Documents” folder then you will see the other ment (Concurrent assignment in this case).

 50201847 Peter Parker

Documents Overview Thumbnail View

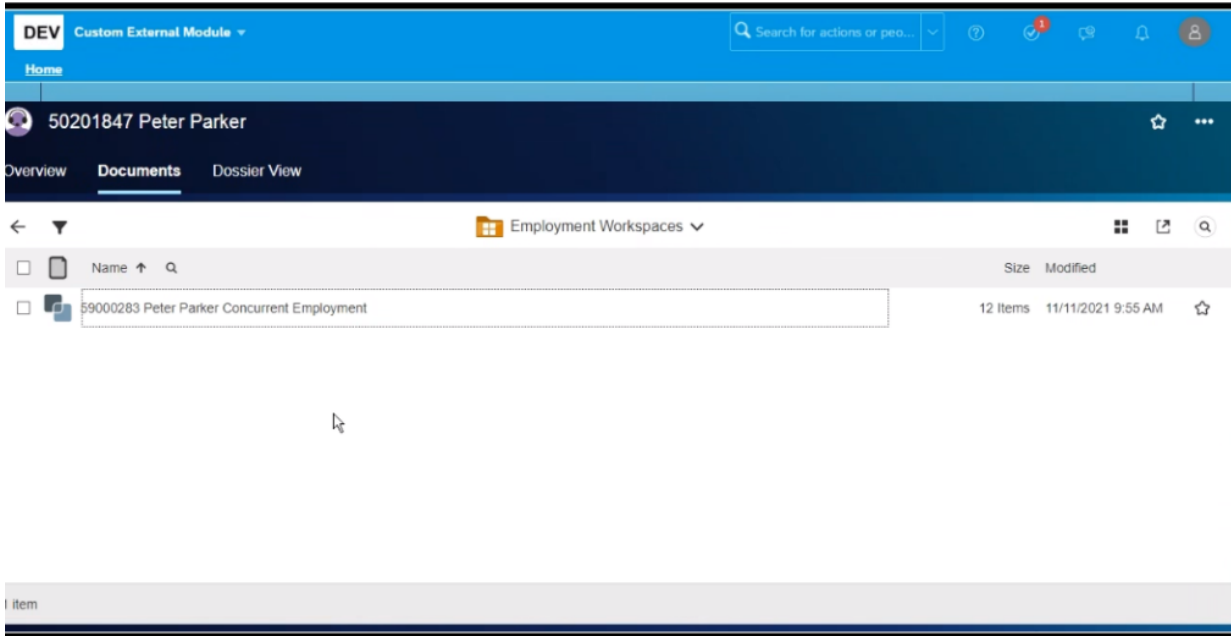
← ▾ 50201847 Peter Parker ▾

 Name ↑ 🔍

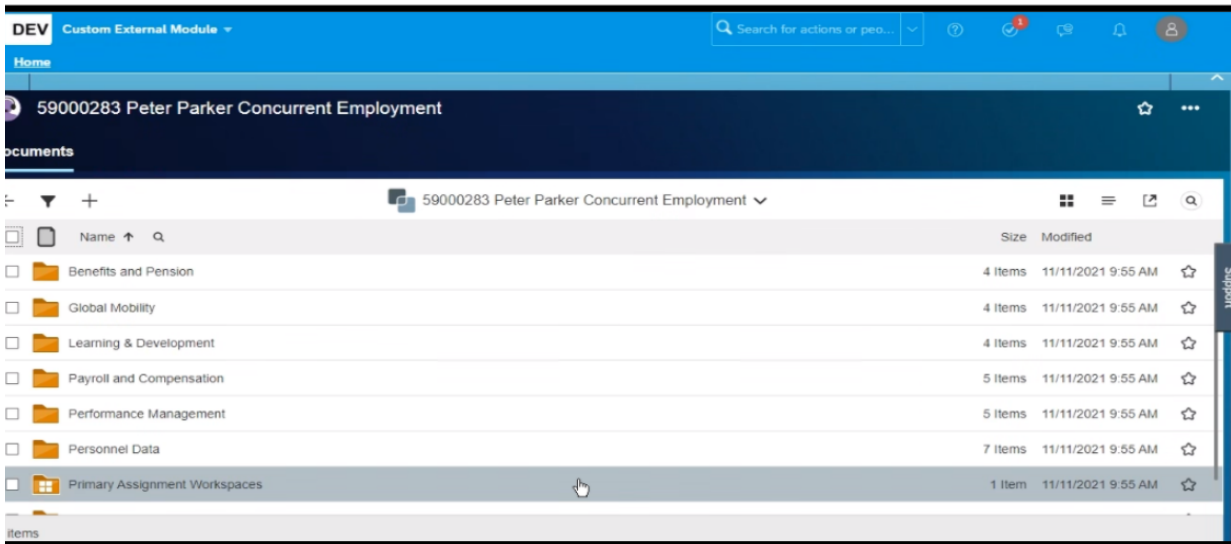
-  Benefits and Pension
-  Concurrent Employment/Host Country Documents
-  Global Mobility
-  Learning & Development
-  Payroll and Compensation
-  Performance & Talent Management
-  Personnel Administration
-  Recruitment

9 items

licking on Concurrent assignment, you will see the folder structure of the employee's Concurrent Assignment as shown below.



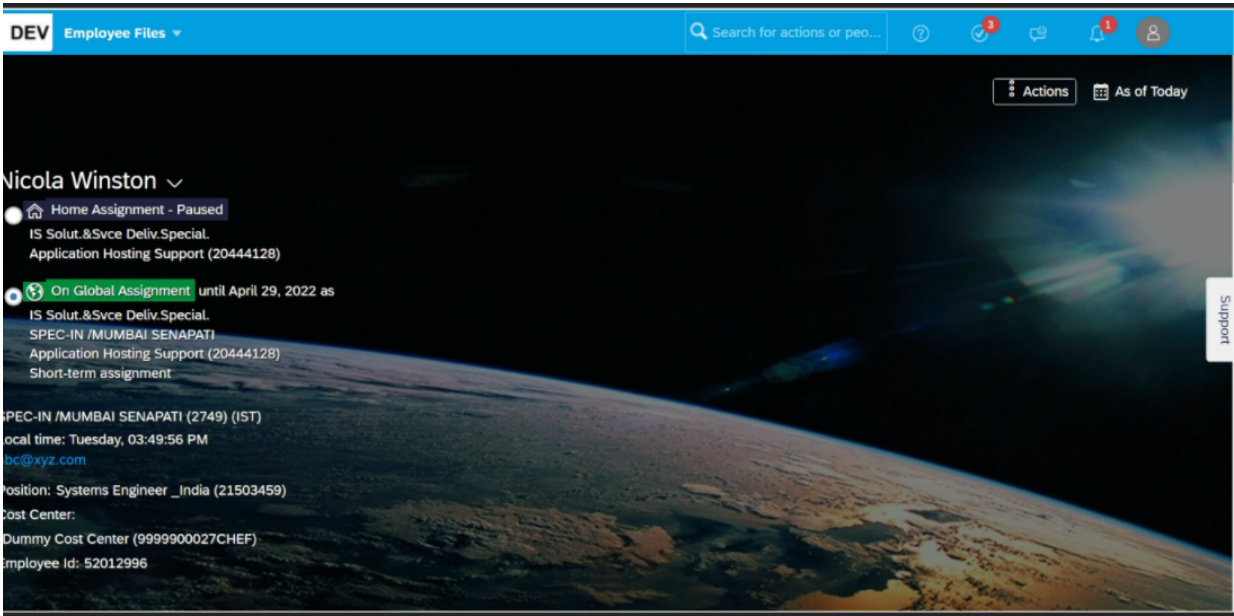
back to the folder structure of the other assignment click on the "Primary Assignment Workspace" folder from the list.



## • Global Assignments

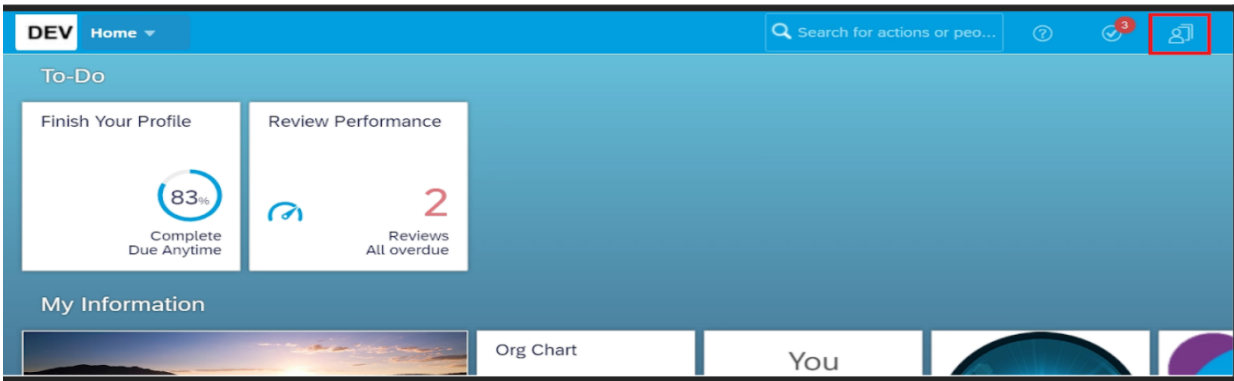
Assignment is when an employee is sent to a different geographical location for the fulfillment of an assignment. In such a case, on their My Profile both the assignments would appear. However, one assignment would be paused (the "home" assignment) while they are active in the other (the "global" assignment).

**Below is the example of an employee profile on Global Assignment:**

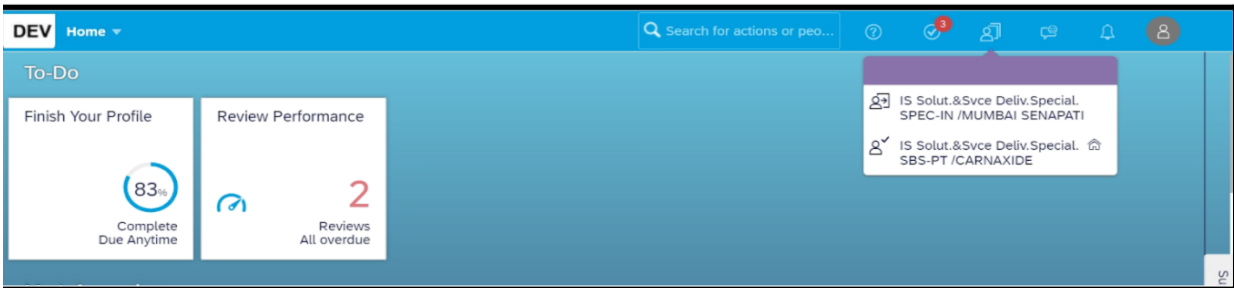


## Switching between assignments



On the My HR Services home page, click on the highlighted icon as shown below to toggle between home assignment and global assignment.



The view you like the one shown below will be displayed.

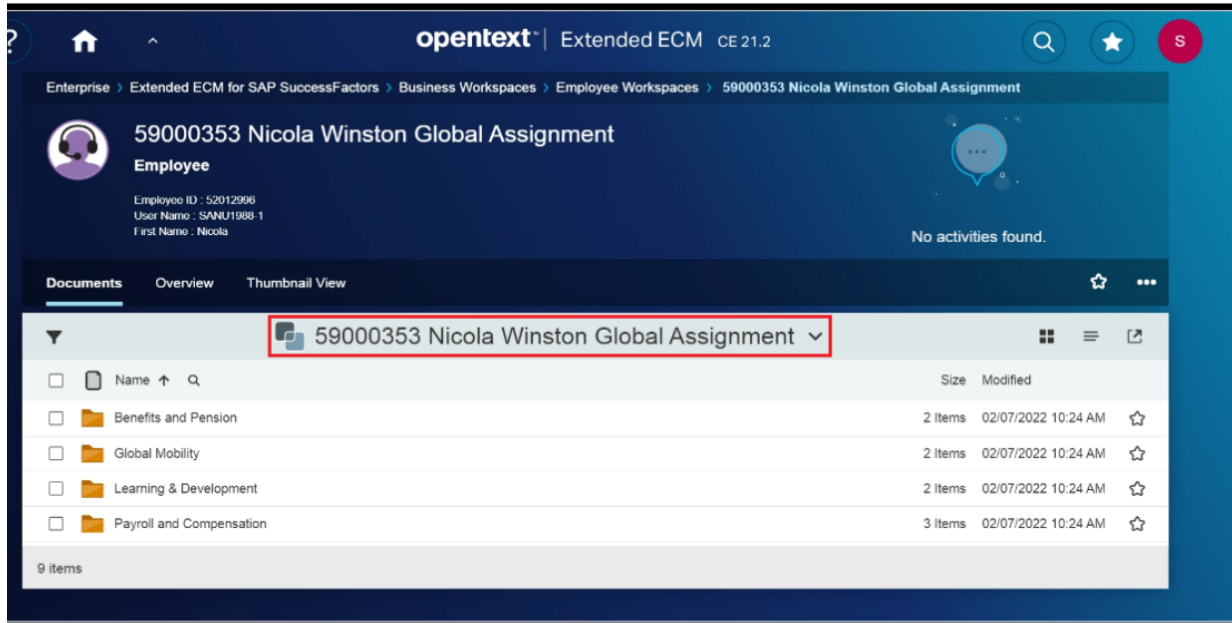


Clicking on the profile icon will switch between the two assignments to access the accounts.

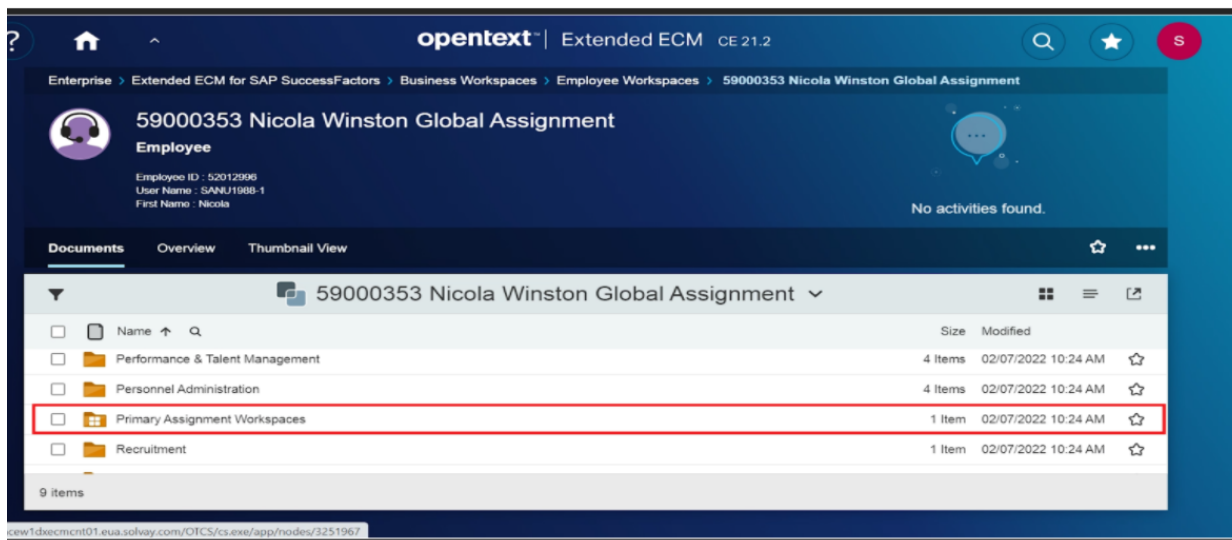
The account you are currently viewing is indicated by this  icon and the other account which you are not viewing is indicated by this  icon.

## Accessing Personal Employee File

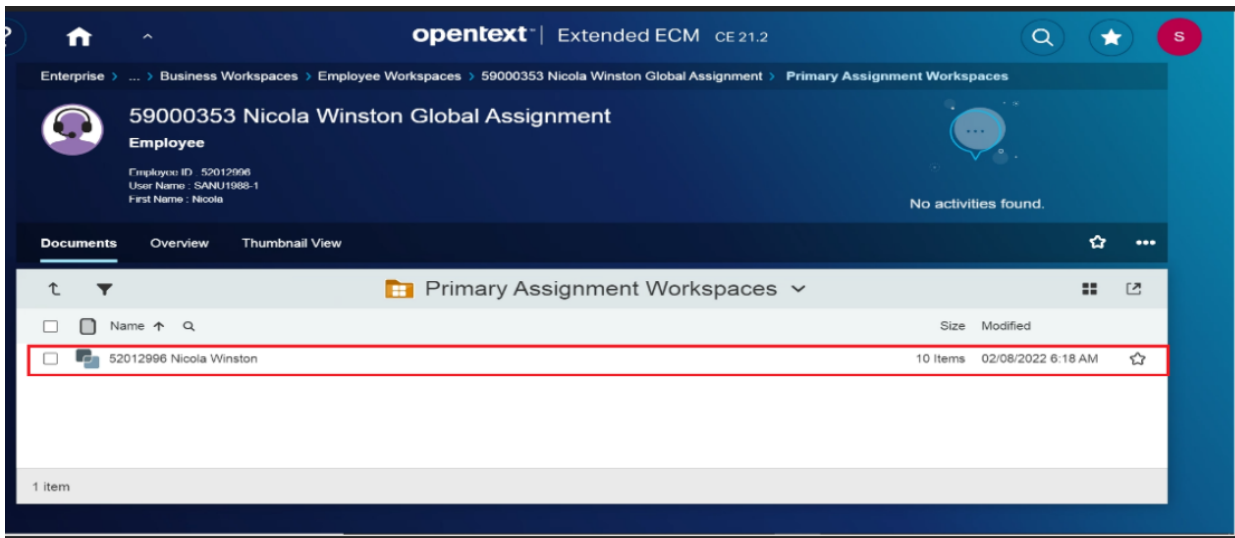
Once you have selected between the above options, you can access the Employee File workspace as shown below. The example below is for the Global Assignment which is indicated by the highlighted box as shown below.



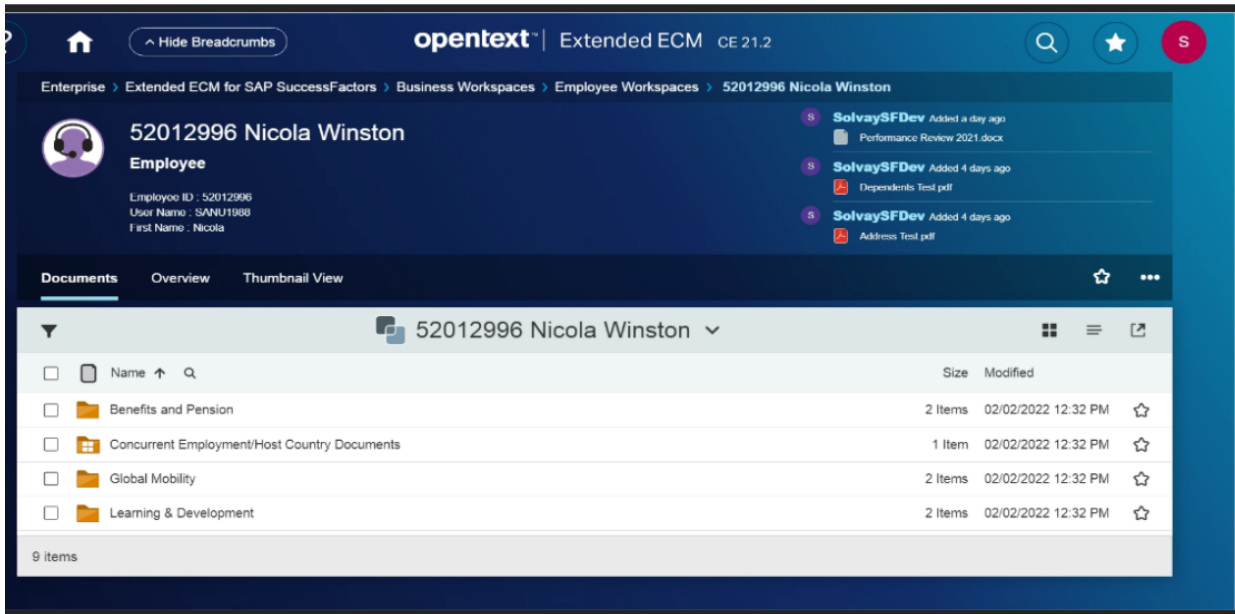
Documents here will contain the documents associated with the global assignment. You can access the primary assignment workspace by clicking on **Primary Assignment Workspaces** as shown below.



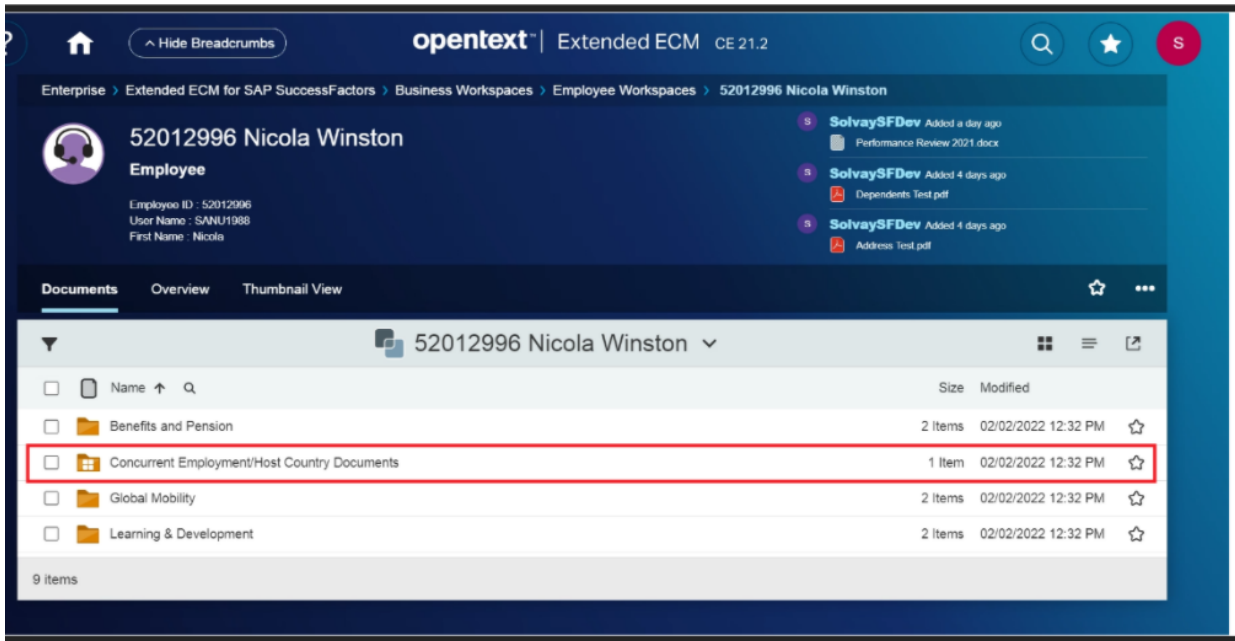
Click on the primary assignments as shown below. Now, click on the primary workspace as highlighted below.



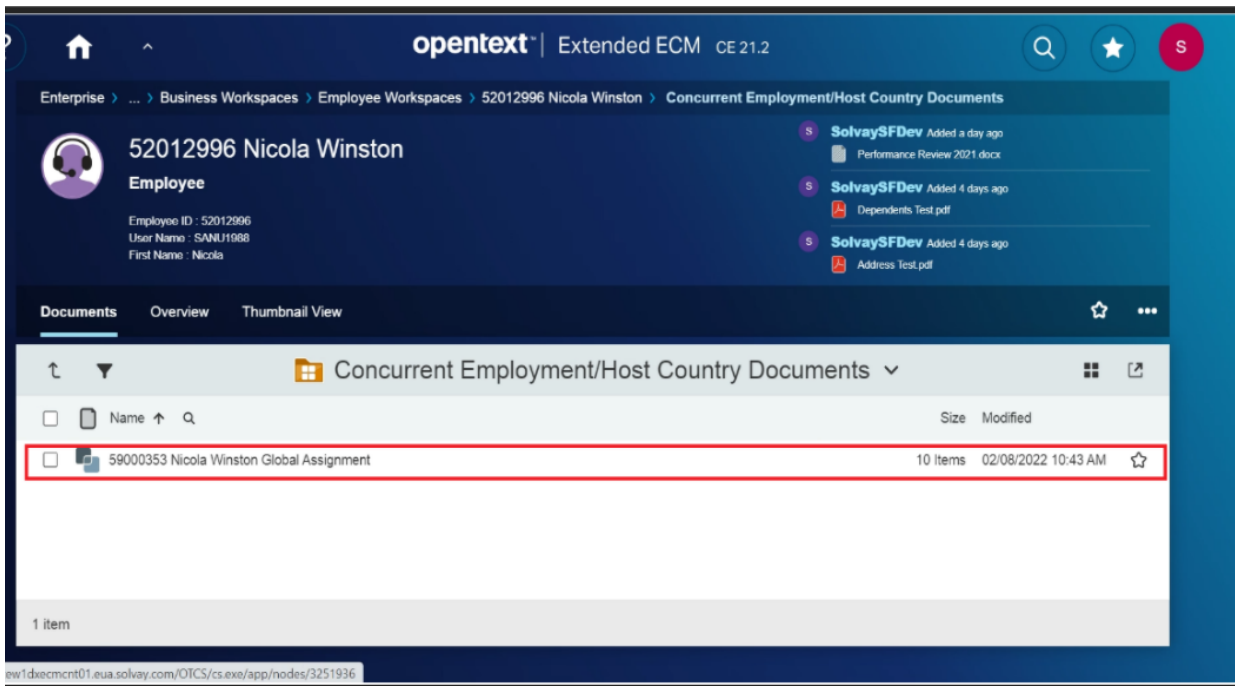
It will be taken to the primary workspace as shown below.



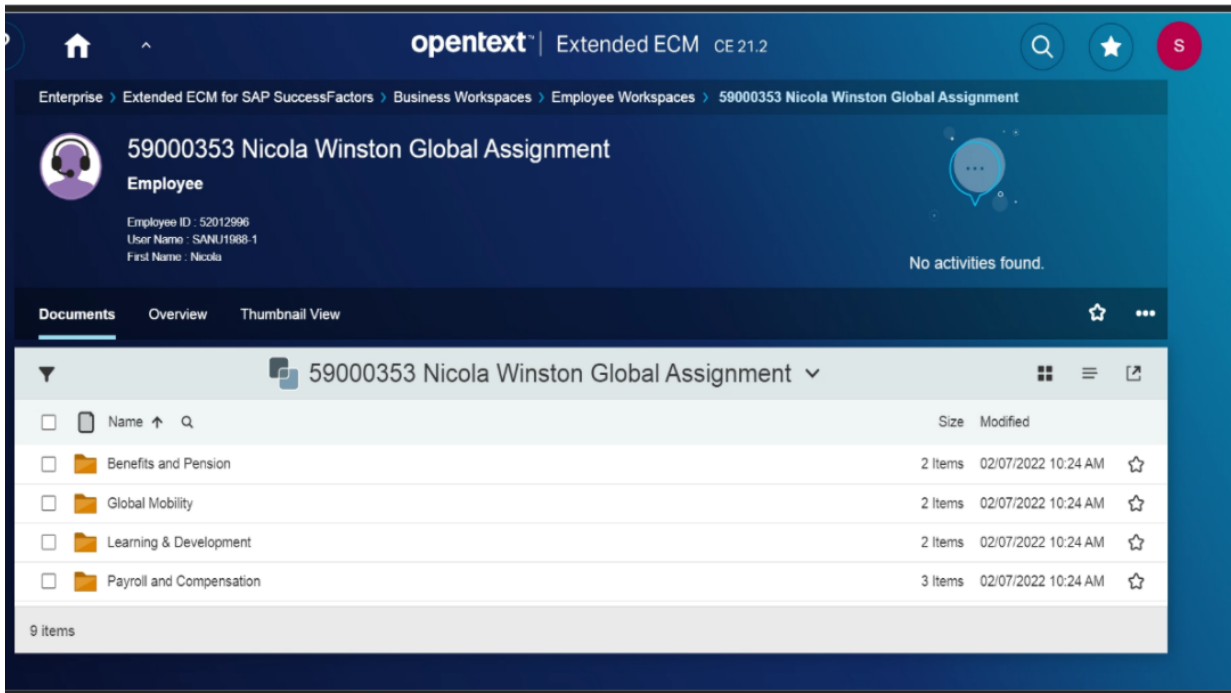
to go back to the global assignment workspace by clicking on **Concurrent Employment Country Documents** as shown below.



an see a list of the global assignment workspaces. Click on the workspace as shown below.



ll be taken to the global assignment workspace as shown below.

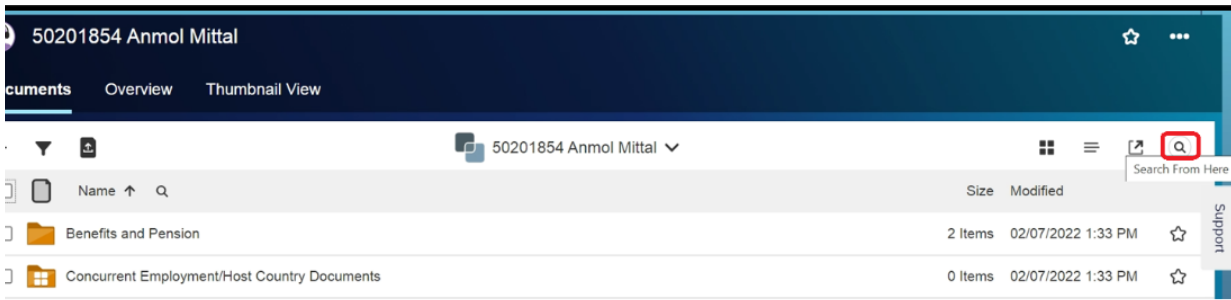


## Inbox

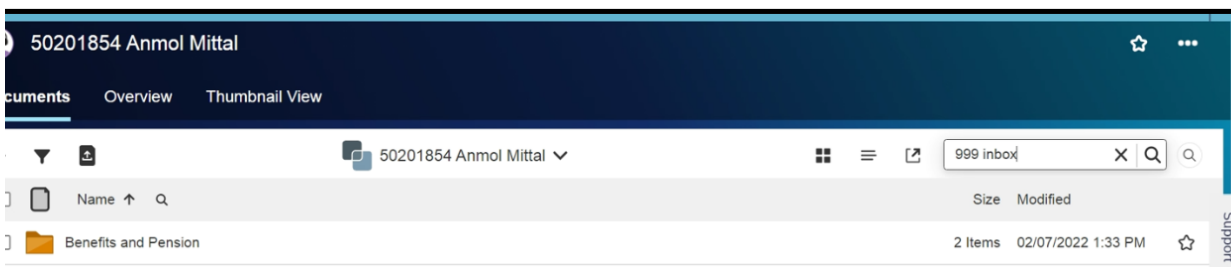
When an HR user uploads or deletes a document in OpenText, it is initially placed in a staging folder called *999 Inbox* within the Employee file workspace. This folder will be visible in the Folder structure.

If an uploaded document (from SuccessFactors/OpenText) is not available in the respective folder inside the Employee file workspace, search for the *999 inbox* using the below instructions,

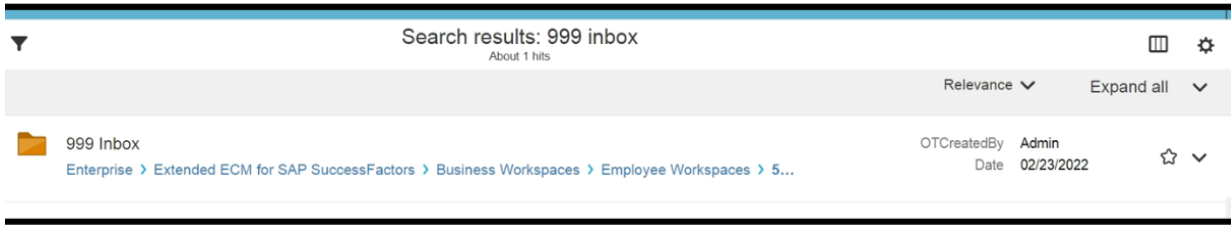
- Inside the Employee file workspace (for whom you uploaded the document) use the below highlighted search option to find *999 inbox*.



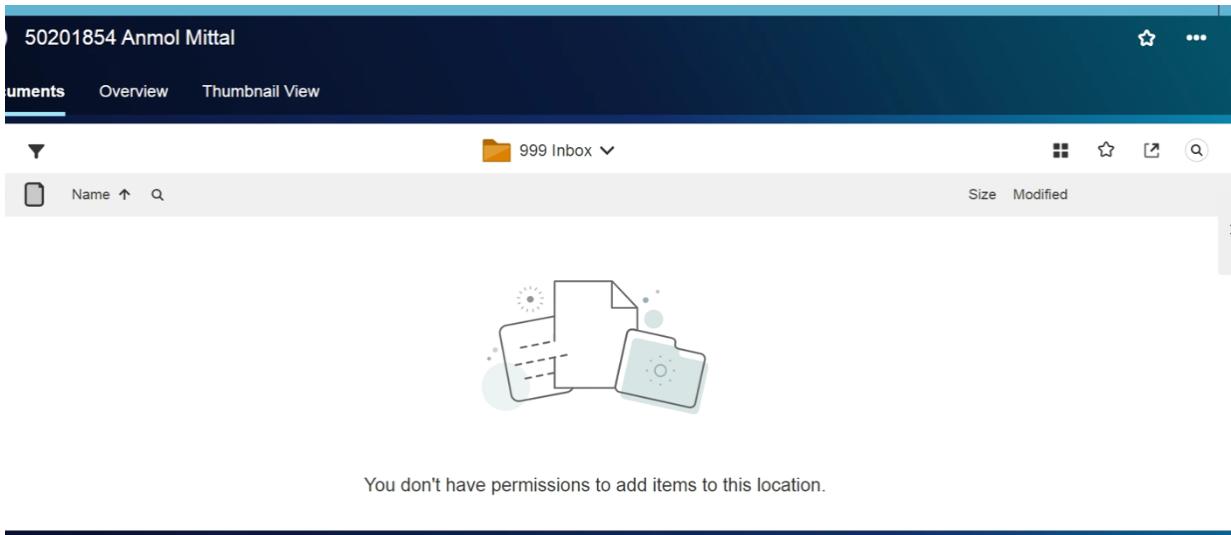
- Now type *999 inbox* in the search bar as shown below and click enter.



- It will take you to the result page as shown below, And now click the folder.



- After opening this, it will open the 999 inbox as shown below.



- If you find that document inside the 999 Inbox folder you can conclude that the document has lost its classification and therefore needs to be reloaded. To have the misclassified document deleted, a ticket will need to be submitted to IT via a ServiceOne request using the catalog category of **"Report an IT Application/Software Incident"**. When you select Submit Request a form will open that you can complete with the related details. In the **Affected Application Section, please reference: OpenText Extended ECM Platform.**

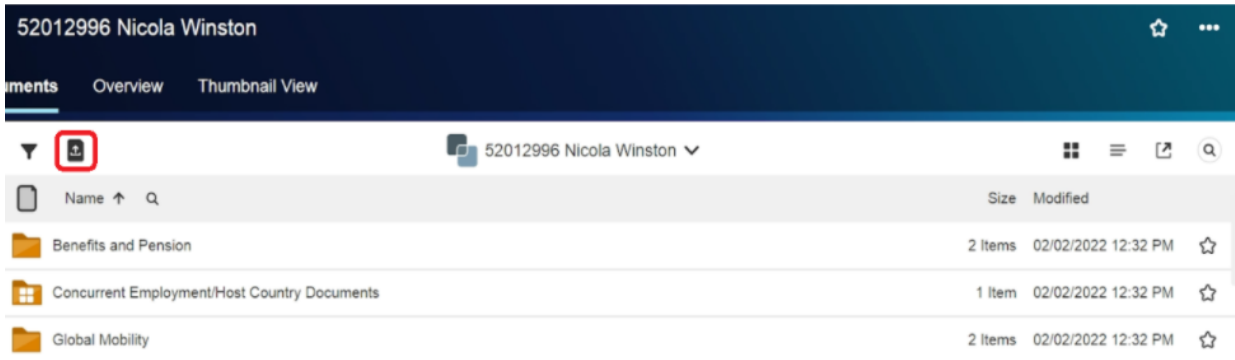
## HR, COUNTRY HR, HR SBPs & PAYROLL


### • Uploading Documents for Employees

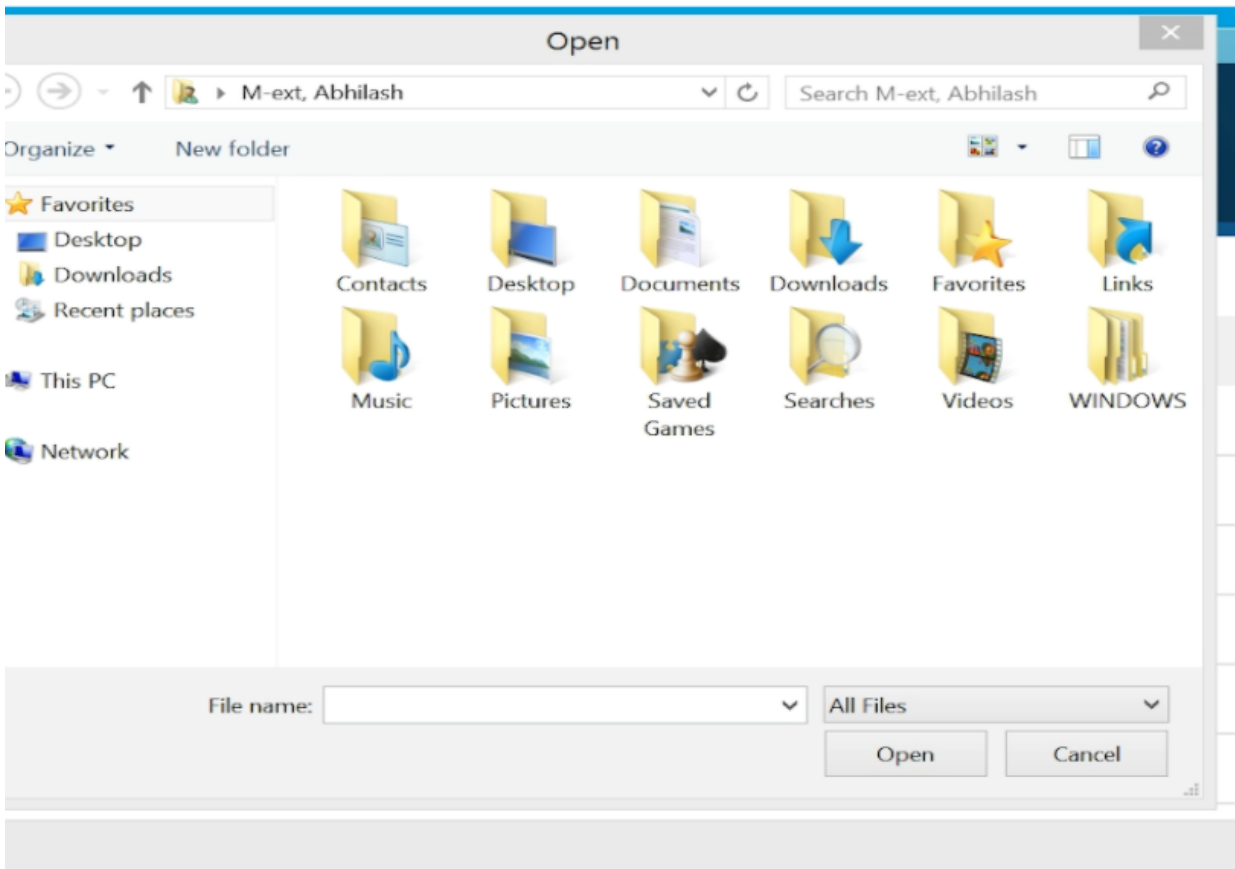
HR you are able to upload documents for an Employee if you are in one of the following roles: **Site HR, Country HR, HR SBP, Payroll, and HR** tions.

R you will get the below highlighted icon which is what you use to upload documents. Please note that this is the only place from which you can load ents within the workspace.

†ANT TO REMEMBER: You **cannot drag and drop documents** or **add them directly into the subfolders**. You must select the file destination dropdown menu as described below.



- Click on this  icon to upload a document.
- After clicking on it you will see a popup to select the document as shown below.



- Select the document from your local system (note that we are not able to upload directly from Google Drive) and then click on the open button. You will get the popup screen shown below.

## New document



\*Document Type

<None>

Name Learning & Development.pdf

Date of Origin

mm/dd/yyyy h:mm a



Description

Enter Description

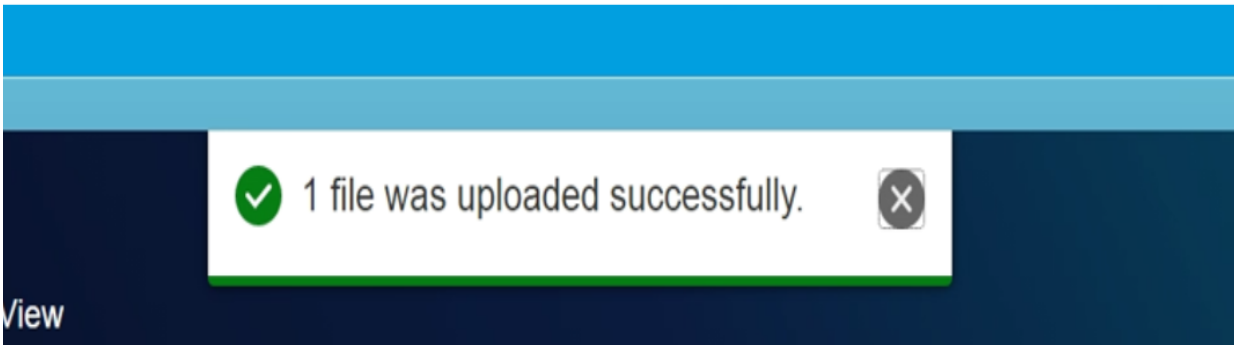
Upload

Cancel

- In the "Document Type" field, select the folder to which you want the document saved to using the drop down list provided.
- Click [here](#) for the **Folder descriptions** in the section called "Navigating through your personal employee file workspace".

*Document Type	Enter a document name
Name	Benefits & Pension - Health & Welfare
Date of Origin	Benefits & Pension - Retirement
Description	Candidate Docs
	Compensation Forms & Docs
	Global Mobility - Admin Docs
	Global Mobility - Agreements Packages
	L&D - Development Plans

- You have the option to enter a date in the field called "Date of Origin" as well as a description of the document in the field called "Description". Once all the details are entered click on "Upload" and the document will be saved in the designated Folder.
- After finishing the above steps click on the Upload button. You will get a Success popup message like this:

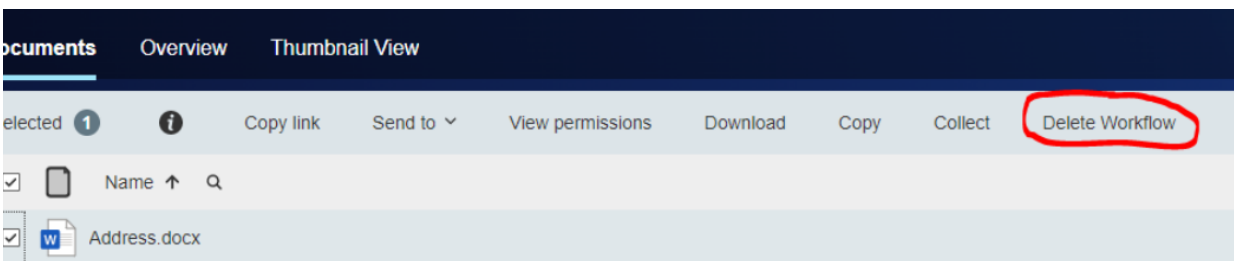


- Now the uploaded document will reside inside the corresponding folder.

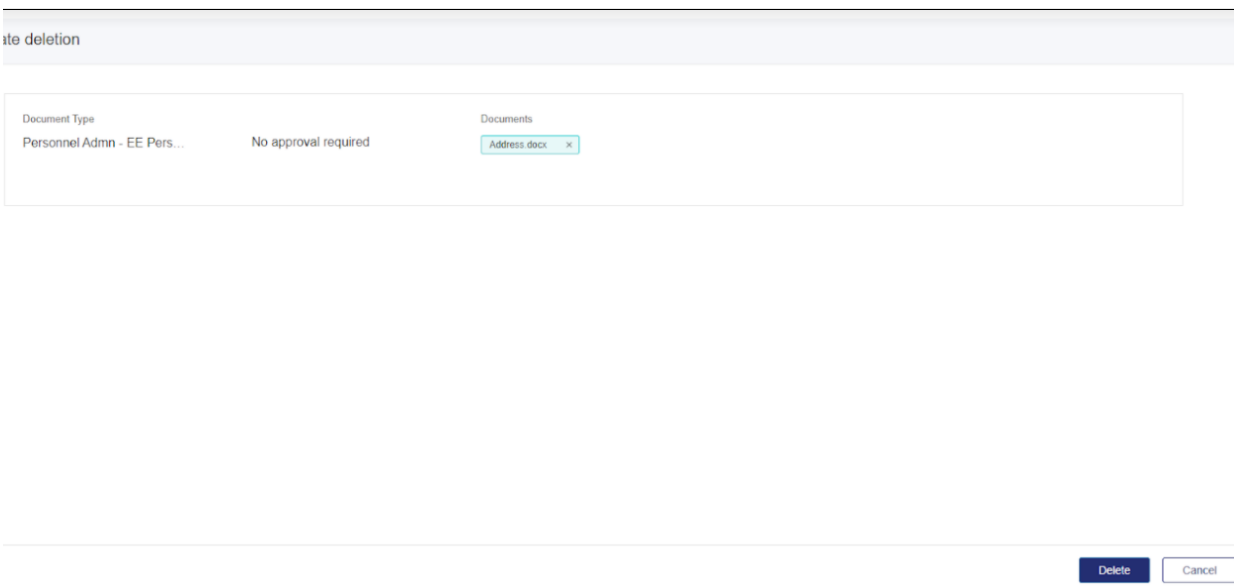
### • Deleting Documents from an Employee's File

HR you are able to remove or delete documents from an Employee's file if you are in one of the following roles: **Site HR, Country HR, HR SBP, I.**

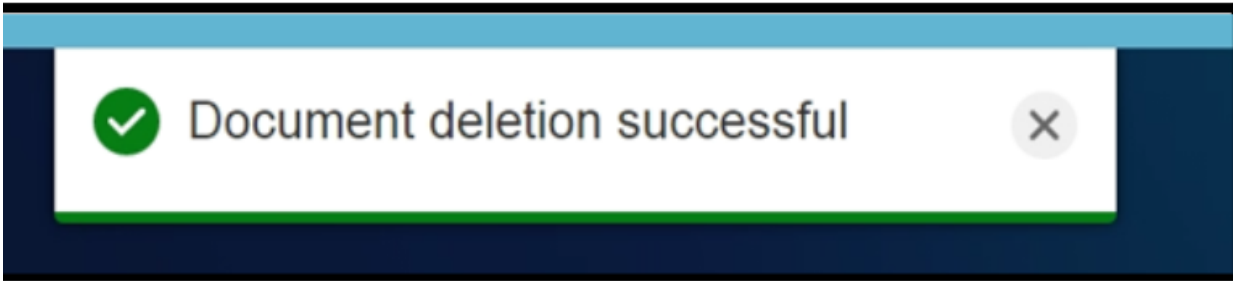
- Select the document you wish to delete and select "Delete Workflow" from the menu options as shown here:



- This will open the Deletion screen as shown below:



- If you click on the Delete button it will remove the document from the workspace and a success message will appear as shown below.



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## HR OPERATIONS ONLY

This section is specific to functionality for members of the HR Operations team.

- **note that due to certain permissions, you might observe that you are able to rename or modify the folder names or even delete a folder. refrain from doing such modifications as it will cause product failures.**

For more details below:

- **RENAMING A SUB-FOLDER**

**DO NOT DO THIS PLEASE!** This function allows you to modify the name of the Sub-Folders however doing so will break the mapping of documents from SuccessFactors.

- **MOVING A DOCUMENT**

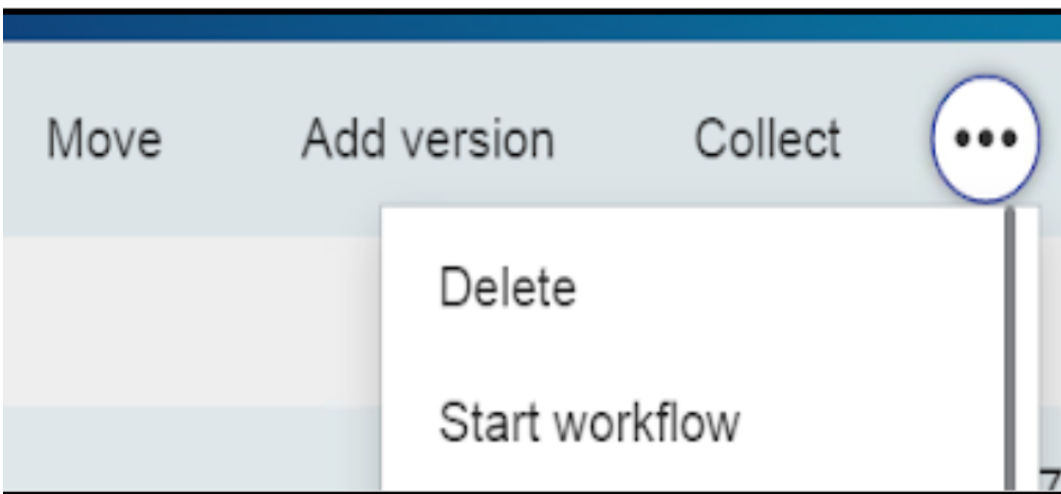
**DO NOT DO THIS PLEASE!** This function allows you to move a document from the current folder to another and cannot be undone. If it is confirmed that a document is in a folder where it does not belong, it should be deleted from that folder and then uploaded to the correct folder rather than "moving" it.

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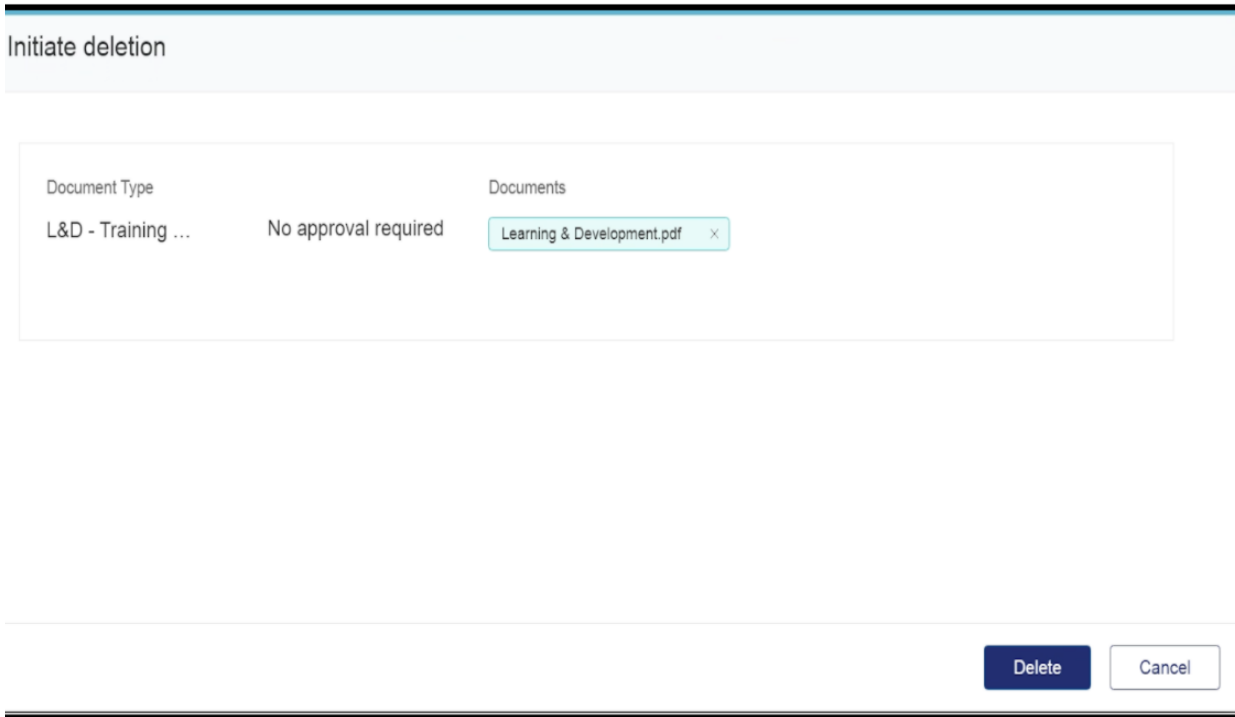
## DELETING A DOCUMENT

HR Operations you are able to remove or delete documents from an Employee's file.

- Select the document you wish to delete and click on the **DELETE** icon as shown below:



- This will open the Deletion screen as shown below:

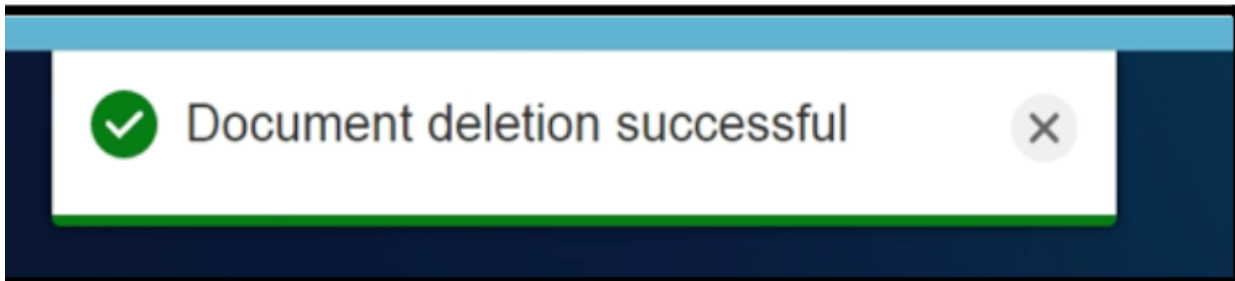


Initiate deletion

Document Type		Documents
L&D - Training ...	No approval required	Learning & Development.pdf

Delete Cancel

- If you click on the Delete button it will remove the document from the workspace and a success message will appear as shown below:



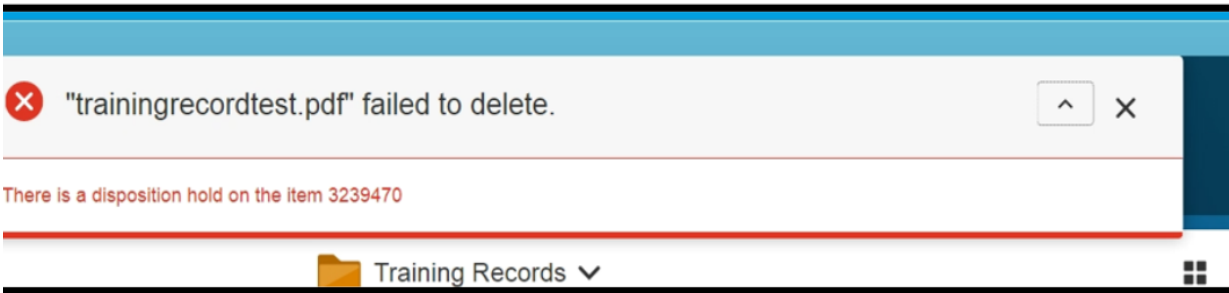
## LEGAL HOLD

The legal department is responsible for notifying HR when a Legal Hold is required and again when it should be removed. HR Operations will apply or remove the hold based on the direction received though generally a legal hold should be applied at the workspace level. The request should be submitted via an HR Service Request using ServiceOne by either the requesting lawyer or Site HR.

Typically within Open Text, a Legal Hold can be applied and removed at the Workspace level (all folders/all documents), the Folder level or the Document level though typically it would be managed at the Workspace level. Instructions for each of these levels is provided below.

An information pop up will appear as shown below. Capture the name of the person providing the instruction to remove the legal hold, the date this was received, and the associated ticket number. Then click on **Yes**.

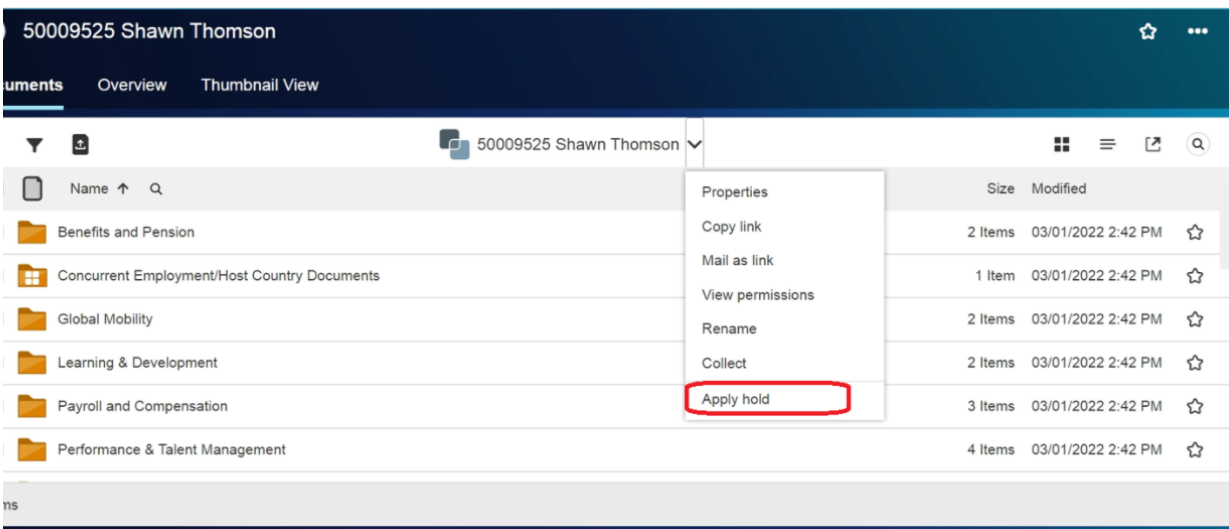
When a Legal Hold is applied and someone tries to delete it, an error message pops up as shown below.



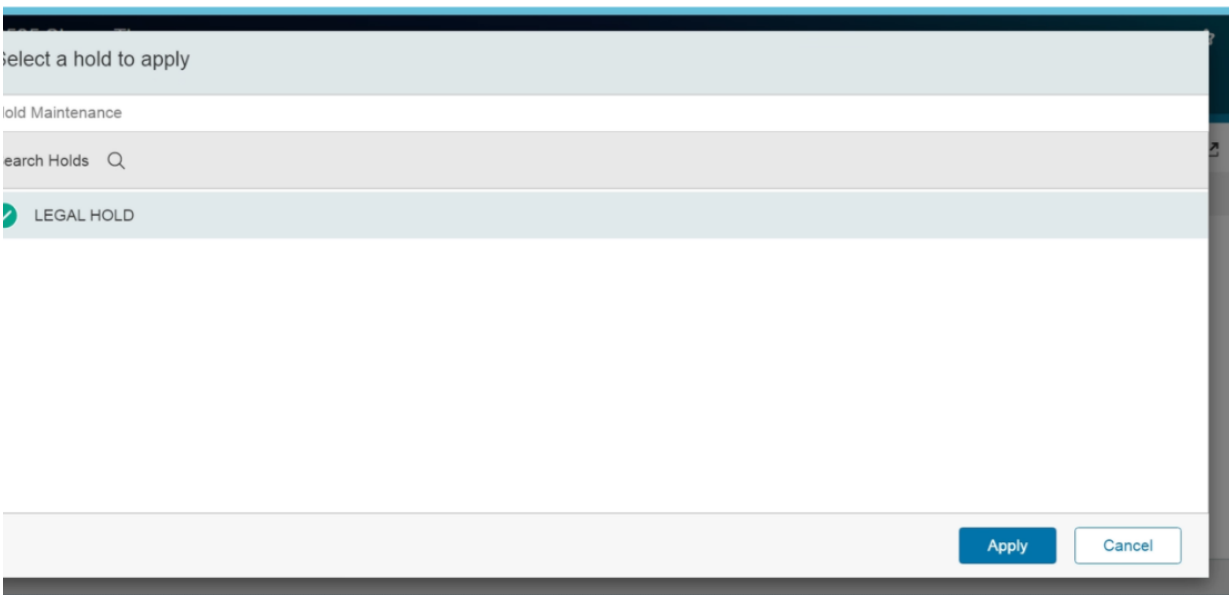
## Applying a Legal Hold at the Workspace Level

Click on the workspace to which the Hold is to be applied, and Click on the breadcrumb next to the employee name as shown below. You will have various options.

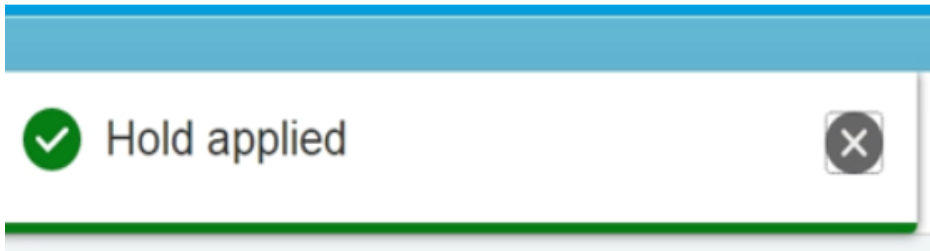
Click on **APPLY HOLD** as highlighted below:



In the next screen, select LEGAL HOLD and click on **Apply** as shown below:

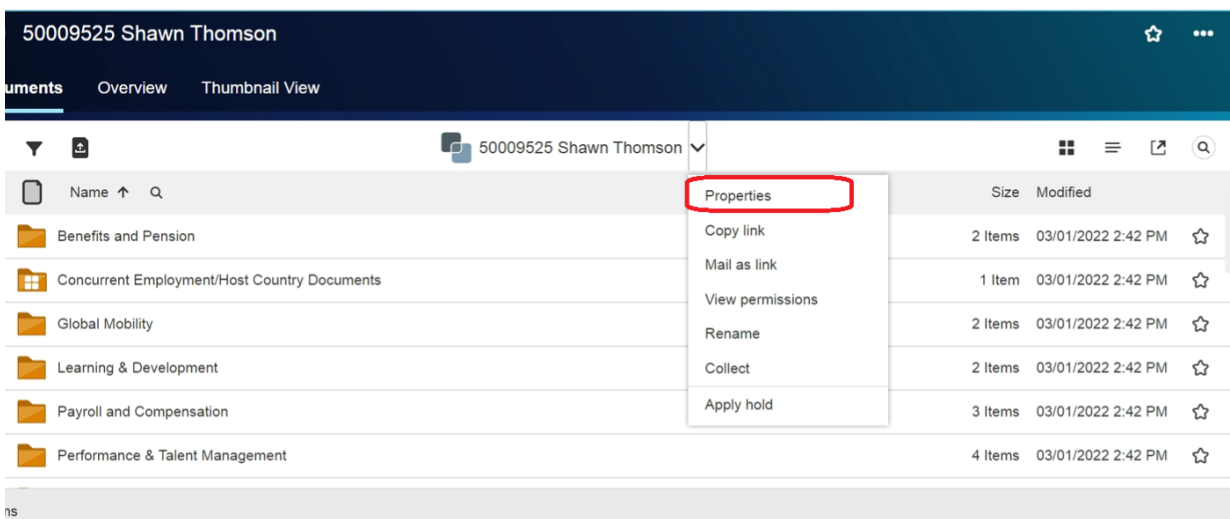


- A pop up message will appear confirming the successful hold application as shown below:



## Removing a Legal Hold at the Workspace Level

- To remove the Legal Hold for the workspace, click on the breadcrumb as shown below and choose "Properties" as shown below:




- You will be directed to the properties screen, there click on the breadcrumb next to Properties and choose **HOLDS** as shown below:

Properties ▾    **General**    Candidate Information    Candidate Job


Properties

- Audit
- Business Objects
- Holds**

Created 03/01/2022 2:42 PM

Created By  Admin

Modified 03/03/2022 7:50 AM

Owned By  Admin



Item ID 316445

▸ A screen similar to below will be displayed where you can see the type of hold applied on the file. Now, select the hold you wish to remove as shown below:

50009525 Shawn Thomson ▾

holds ▾

**Remove**

<input type="checkbox"/>	Hold name	Applied based on	Type	Comments	It
<input checked="" type="checkbox"/>	  LEGAL HOLD		LEGAL-HOLD	It is a legal hold	

▸ A confirmation pop up will appear as shown below. Capture the name of the person providing the instruction to remove the legal hold, the date this was effective, and the associated ticket number. Then click on **Yes**.

## ? Remove

Do you want to remove this hold?

Enter the reason for removing the hold(s)

Yes

No

- A message appears confirming the removal of hold as shown below. Henceforth, the file can be deleted and no error message will pop up.

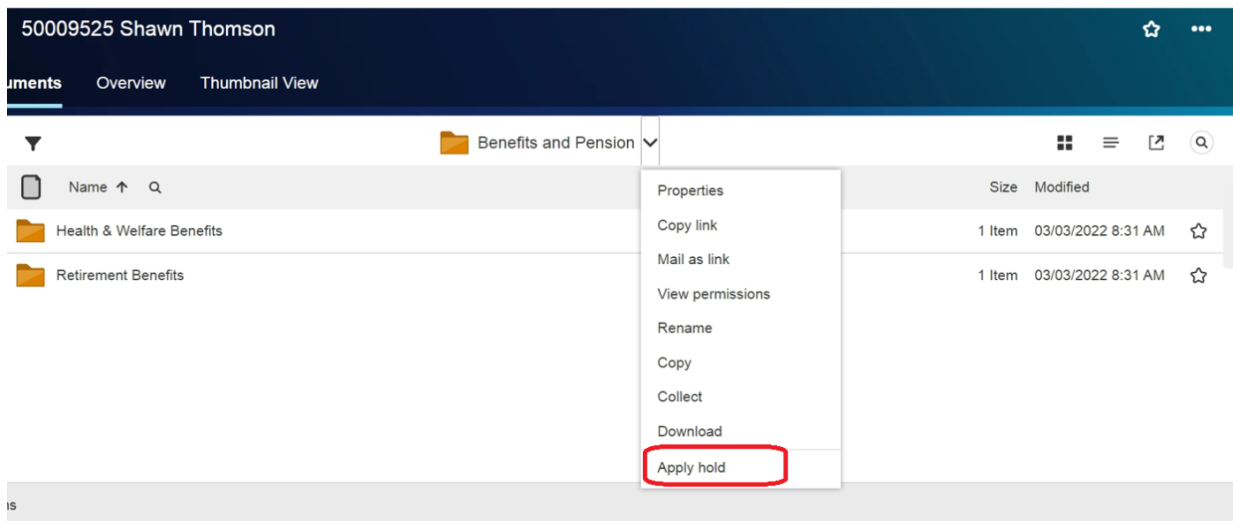
✓ 1 hold successfully removed.



### Applying a Legal Hold at the Folder Level

Click on the Folder to which the Legal Hold should be applied and Click on the breadcrumb next to the employee name as shown below. You will have several options.

Click on **APPLY HOLD** as highlighted in below:



- Select Legal Hold and click on **Apply** as shown below:

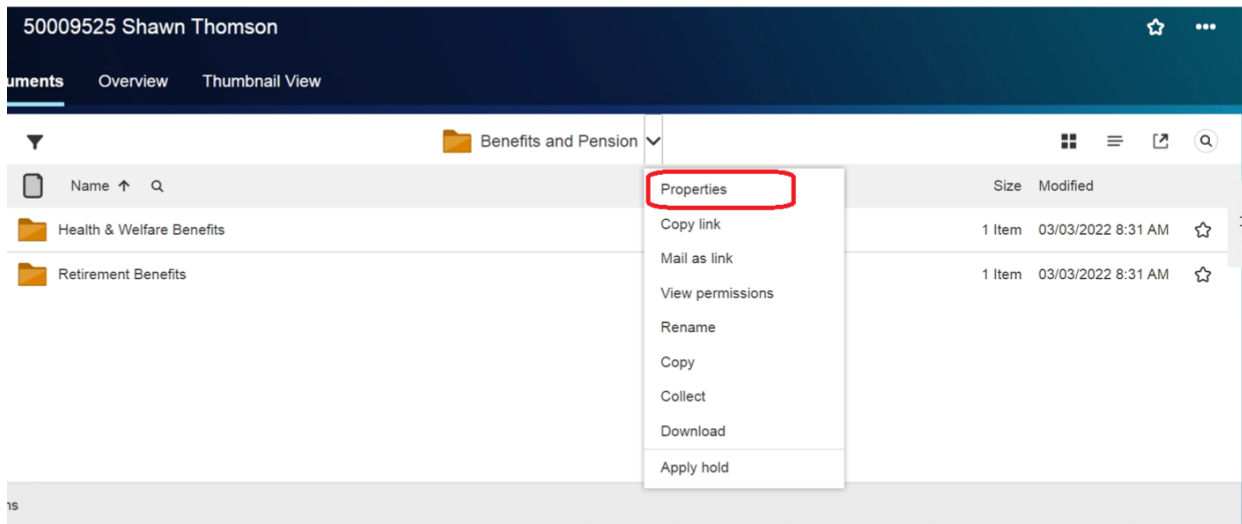


- A pop up message will appear confirming the successful hold application as shown below:

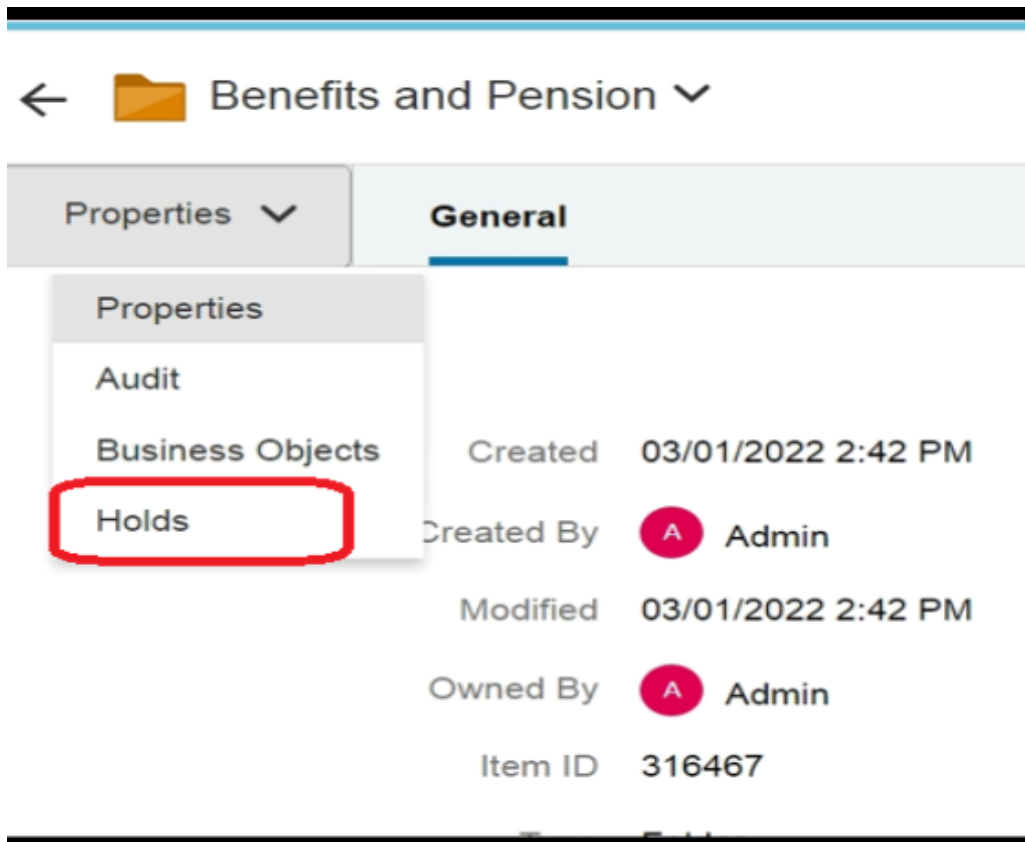


### Removing a Legal Hold at the Folder Level

- To remove the Legal Hold at the Folder level, select the folder with the hold and click on the breadcrumb and choose "Properties" as shown below:



- You will be directed to the properties screen. Click on the breadcrumb next to Properties and choose **HOLDS** as shown below:



- A screen similar to below will be displayed where you can see the type of hold applied on the file. Now, select the hold you wish to remove as shown below.

Benefits and Pension ▾

ds ▾

Remove

<input checked="" type="checkbox"/>	Hold name	Applied based on	Type	Comments	Item on direct hold
<input checked="" type="checkbox"/>	LEGAL HOLD		LEGAL-HOLD	It is a legal hold	

1 item

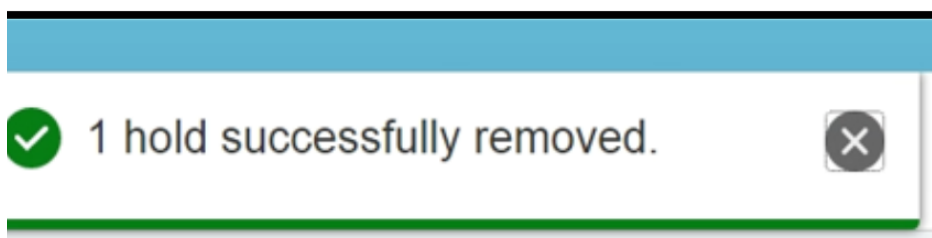
- A confirmation pop up will appear as shown below. Capture the name of the person providing the instruction to remove the legal hold and the date this was effective and then click on **Yes**.

## ? Remove

Do you want to remove this hold?

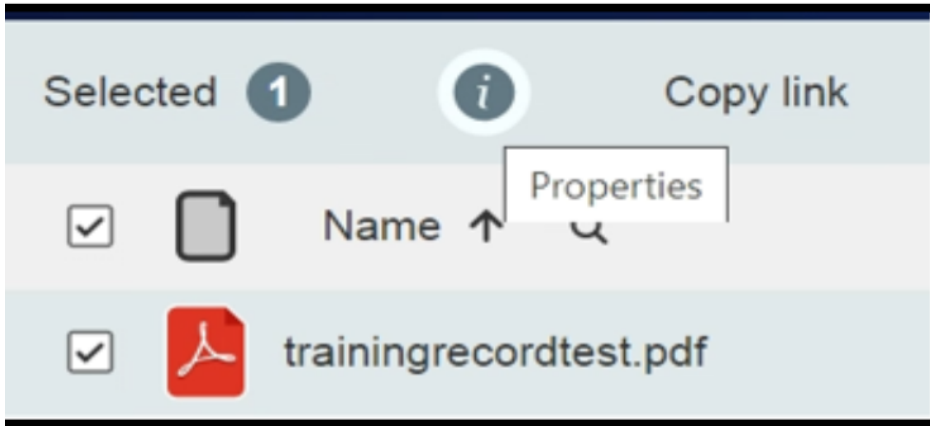
Enter the reason for removing the hold(s)

- A message appears confirming the removal of hold as shown below. Henceforth, the file can be deleted and no error message will pop up.

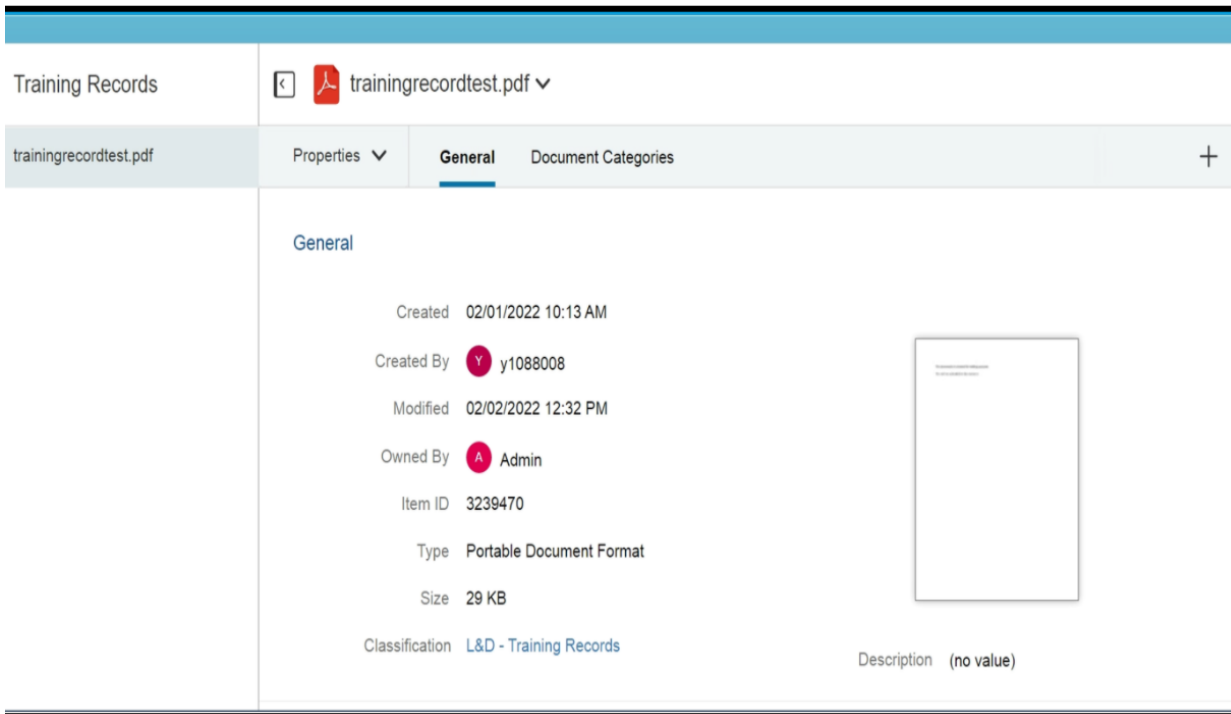


## Applying a Legal Hold at the Document Level

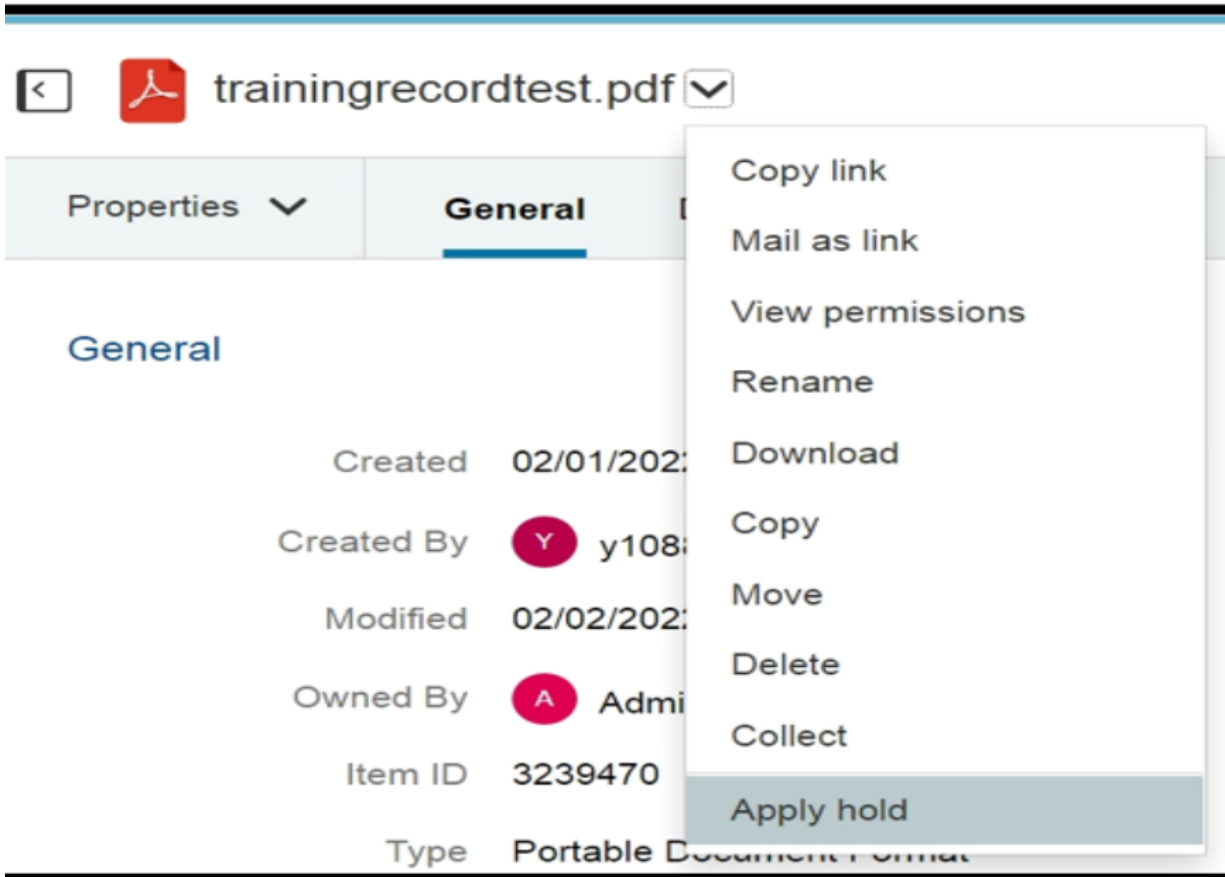
- Select the document to be put on legal hold and click on the "Properties" icon as shown below:



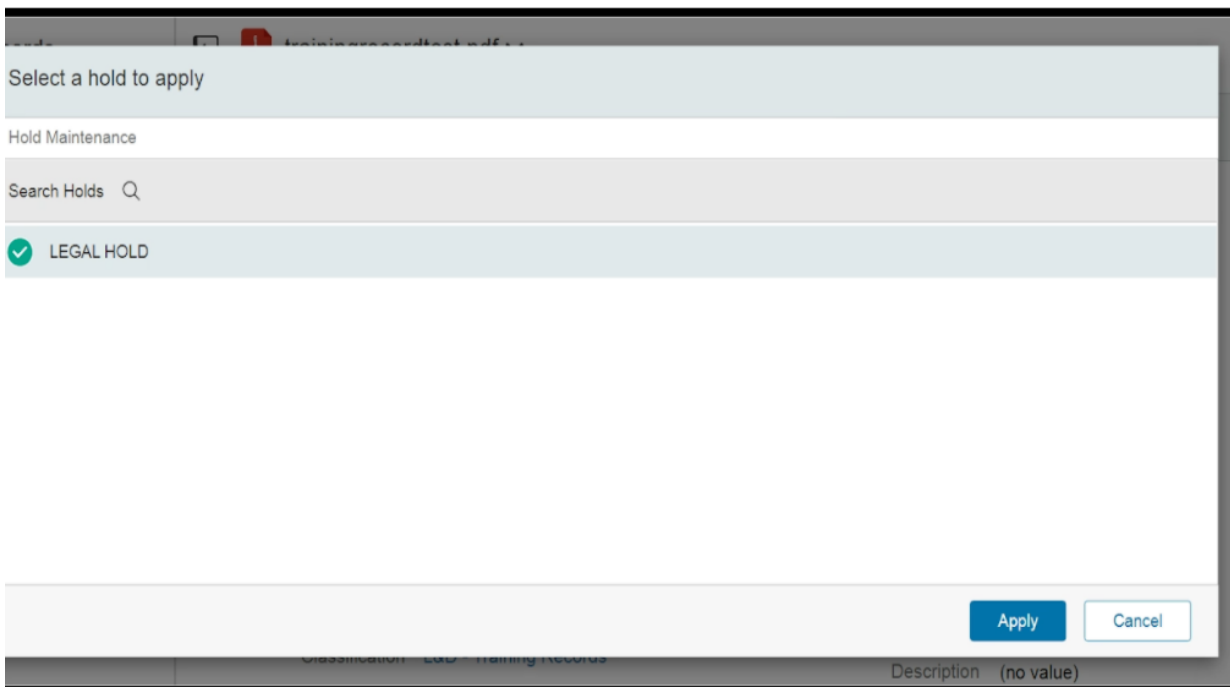
- You will see the properties of the file as shown below:



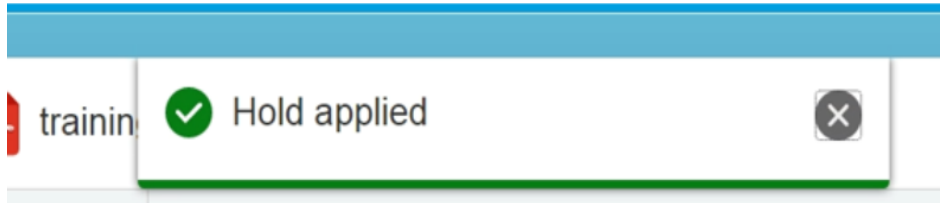
- Click on the breadcrumb icon as shown below and select **Apply hold**.



• Select the hold to be applied and click on **Apply** as shown below:

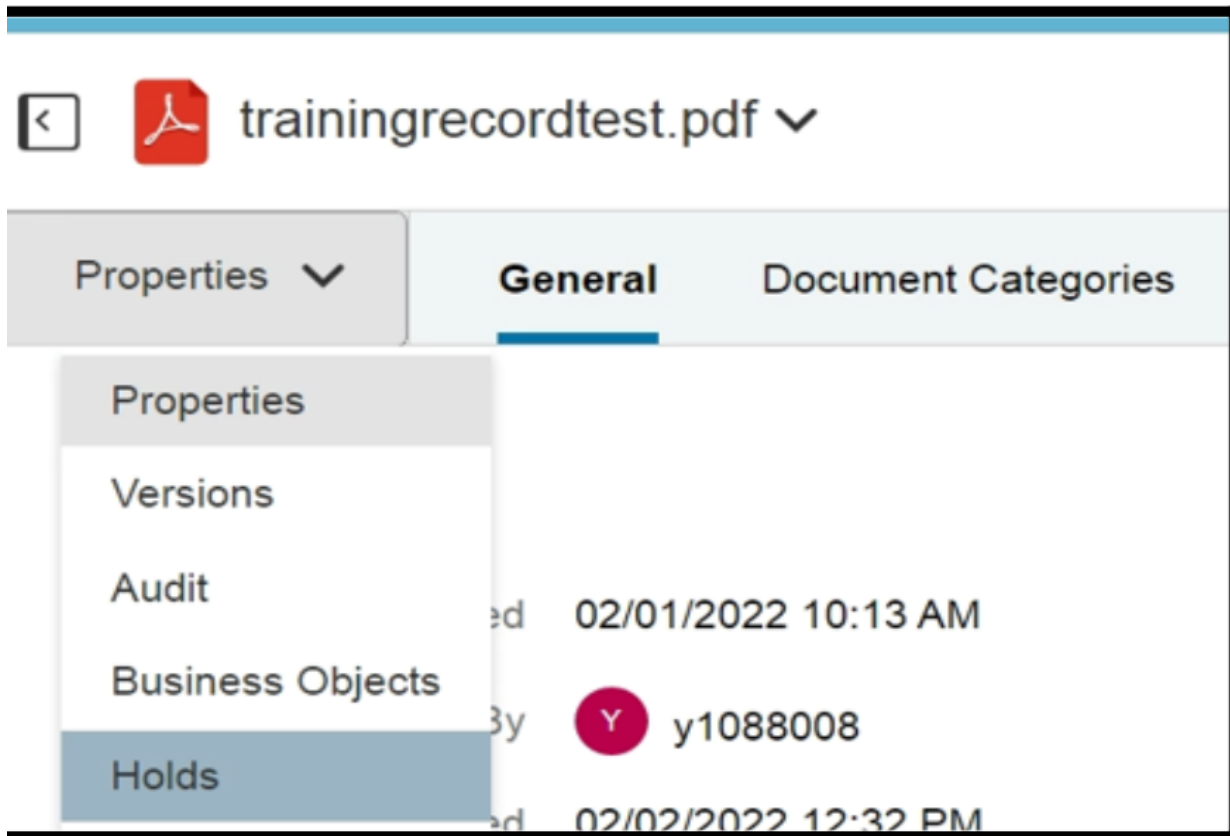


• A pop up message will appear confirming the successful hold application as shown below:




## oving a Legal Hold at the Document Level

- To remove the Legal Hold at the Document level, select the document with the hold and click on the properties icon as shown below. Now select **Holds**.





- A screen similar to below will be displayed where you can see the type of hold applied on the file. Now, select the hold you wish to remove as shown below:

]  trainingrecordtest.pdf ▾


Holds ▾

Remove

<input checked="" type="checkbox"/>	Hold name	Applied based on	Type	Comments	Item on direct hold
<input checked="" type="checkbox"/>  	LEGAL HOLD		LEGAL-HOLD	It is a legal hold	

- A confirmation pop up will appear as shown below. Capture the name of the person providing the instruction to remove the legal hold and the date this was effective and then click on **Yes**.

Holds ▾

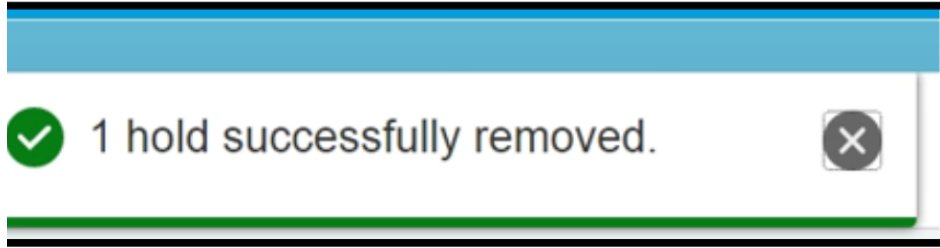
 **Remove**

Do you want to remove this hold?

Enter the reason for removing the hold(s)

Comments  
is a lega

- A message appears confirming the removal of hold as shown below. Henceforth, the file can be deleted and no error message will pop up.



Identify any issues, have any questions or need general support, please either submit a request through [ServiceOne](#) or [call](#) our HR Operations [pages](#).

list updated: 16 Aug 2022