

HR - Accessing Employee Files Historical space

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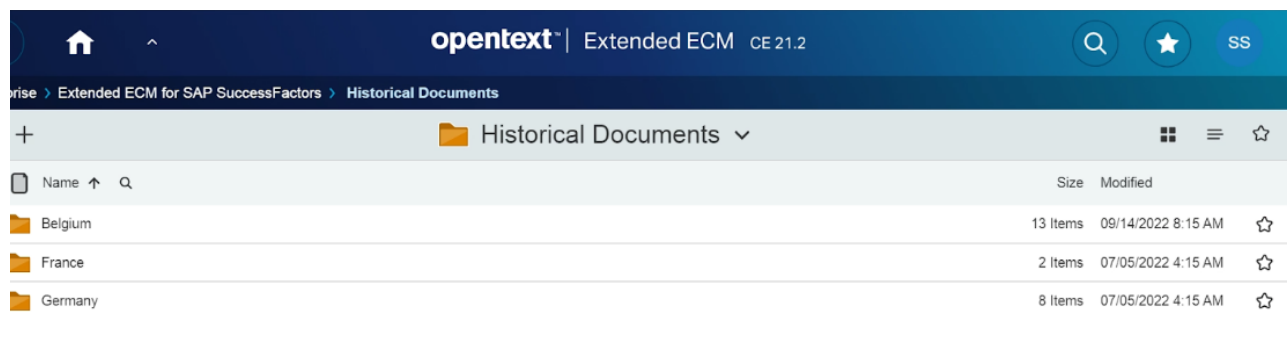
INTRODUCTION

Extended ECM for SAP SuccessFactors combines information and document management features of OpenText Platform with employee files that are maintained in SuccessFactors.

Only HR professionals can view and manage documents of historical employees in their scope. Exactly what one can see or act upon depends on the country access role you hold.

ACCESSING EMPLOYEE FILE HISTORICAL PAGE

- Login to xECM historical by using [THIS LINK](#).
- After logging in, you will be directed to the Historical HomePage as shown below. You will be able to see the country folders depending on your access permissions.



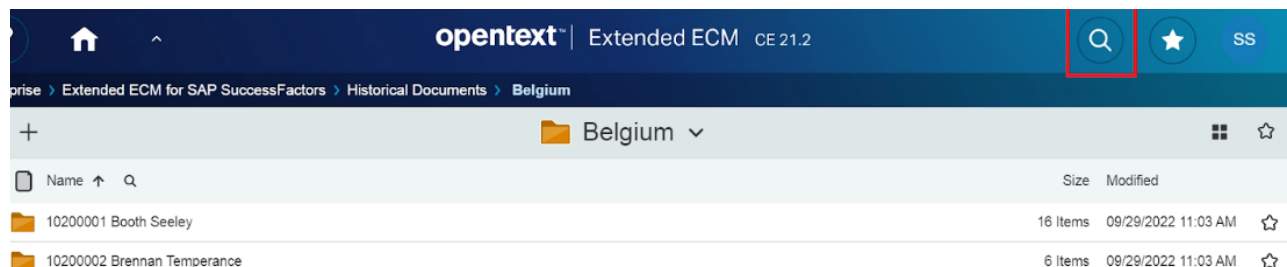
If you identify any issues, have any questions or need general support, please either submit a request through [ServiceOne](#) or [call](#) our HR Operations team.

EMPLOYEE FILE HISTORICAL WORKSPACE FUNCTIONALITIES

- **Searching for the employee folder**



Click on the search icon as shown below. Type in the employee name or the employee id and click enter.



Type in the employee name or the employee id as shown below and click enter.

Search results for Neil Harris

Name	Size	Modified	Actions
10200001 Booth Seeley	16 Items	09/29/2022 11:03 AM	Star
10200002 Brennan Temperance	6 Items	09/29/2022 11:03 AM	Star
12000062 James Smith	17 Items	09/29/2022 11:03 AM	Star
12000118 John Johnson	16 Items	09/29/2022 11:03 AM	Star
12000722 Linda Brown	16 Items	09/29/2022 11:03 AM	Star

arch results will be shown as below.

Search results: Neil Harris
About 1 hits

Relevance ▾ Expand all ▾

6343003 Neil Harris
Enterprise > Extended ECM for SAP SuccessFactors > Historical Documents > Belgium

OTCreatedBy Admin
Date 09/29/2022

• Changing list view to grid view

on the  Icon as highlighted below to change the view from list view to grid view.

Belgium ▾

Name	Size	Modified	Actions
10200001 Booth Seeley	16 Items	09/29/2022 11:03 AM	Star
10200002 Brennan Temperance	6 Items	09/29/2022 11:03 AM	Star
12000062 James Smith	17 Items	09/29/2022 11:03 AM	Star
12000118 John Johnson	16 Items	09/29/2022 11:03 AM	Star

in, click on  icon highlighted below to revert to the list view.

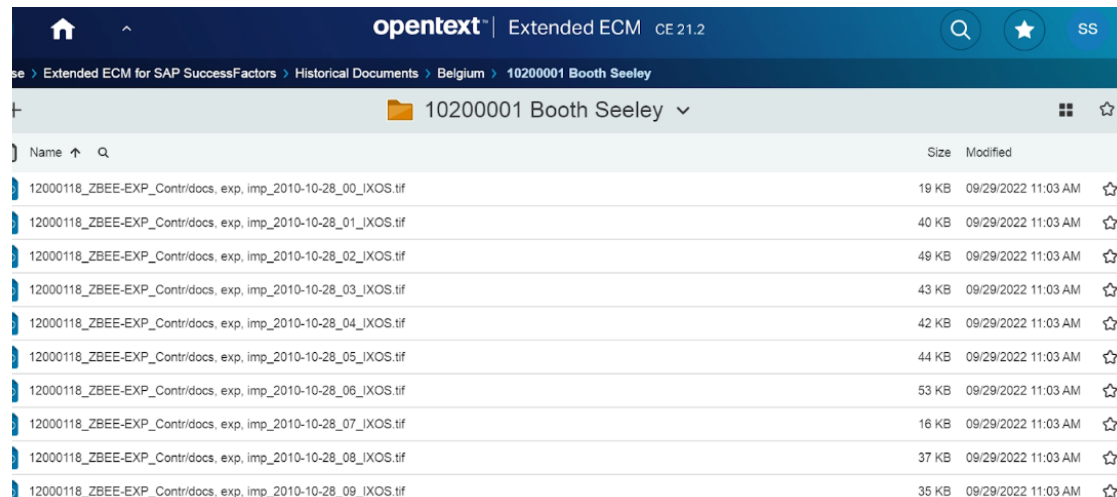
Belgium ▾

Select all 13 items Name ▾ ↑ Q

200001 Booth Seeley	10200002 Brennan Temperance	12000062 James Smith	12000118 John Johnson	12000722 Linda Brown	12000762 Barbara Doe
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HOW TO PERFORM ACTIONS WITH FILES

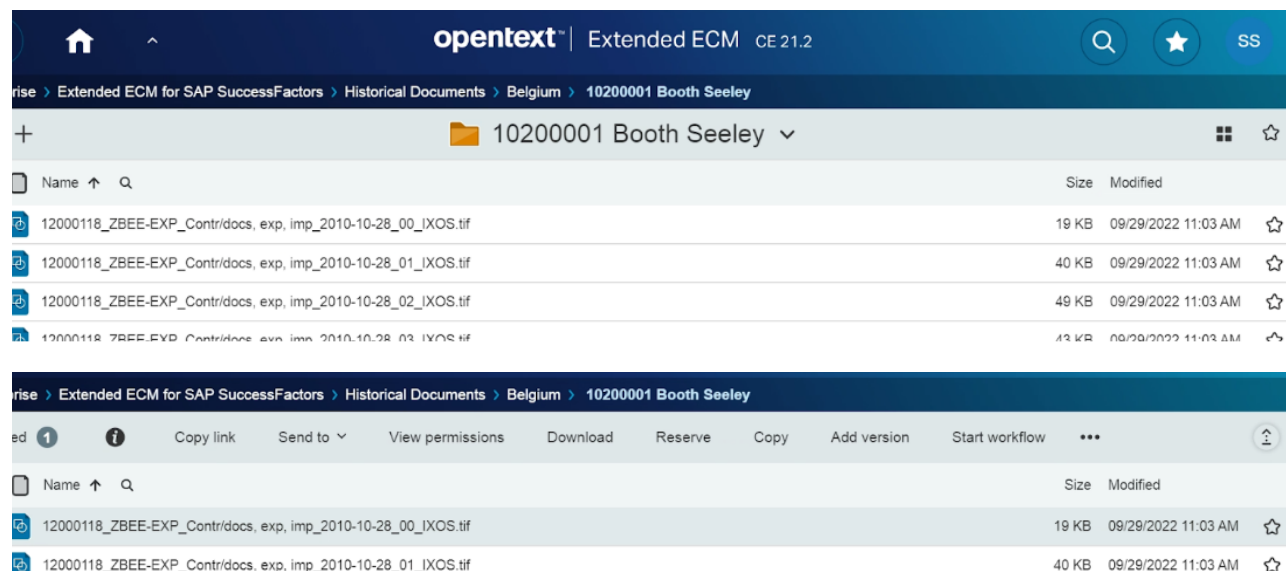
When you are inside the employee folder, you can see the various documents of the employee.



The screenshot shows the opentext Extended ECM interface. The breadcrumb path is: Home > Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley. Below the breadcrumb, there is a folder icon and the text '10200001 Booth Seeley'. A table lists files with columns: Name, Size, and Modified. The files are TIFF documents with names like '12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IJOS.tif'.

Name	Size	Modified
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IJOS.tif	19 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IJOS.tif	40 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IJOS.tif	49 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IJOS.tif	43 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IJOS.tif	42 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_05_IJOS.tif	44 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_06_IJOS.tif	53 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_07_IJOS.tif	16 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_08_IJOS.tif	37 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_09_IJOS.tif	35 KB	09/29/2022 11:03 AM

You can select an item(s) by checking the box like this  as shown below to perform certain actions. These actions are available in the menu . Additional actions can be accessed by clicking on the  icon.



The screenshot shows the opentext Extended ECM interface with a context menu open. The breadcrumb path is: Home > Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley. The file list is the same as in the previous screenshot. The context menu is open over the first file, showing options: Copy link, Send to, View permissions, Download, Reserve, Copy, Add version, Start workflow, and a More options icon (three dots).

Name	Size	Modified
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IJOS.tif	19 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IJOS.tif	40 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IJOS.tif	49 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IJOS.tif	43 KB	09/29/2022 11:03 AM

Note:

- It is used to Copy the document to another location. This doesn't work so it is not to be used.
- > Mail as link- This Feature needs a browser extension but that is not enabled in Syensqo environment so it cannot be used.

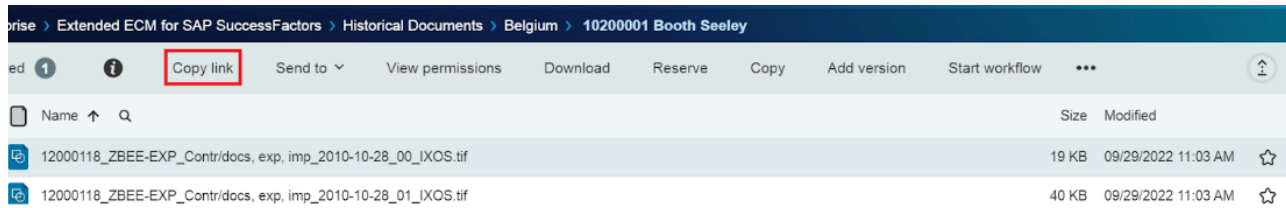
ACTIONS AVAILABLE HISTORICAL EMPLOYEE FILE SPACE

Various actions available and steps to perform are given below.

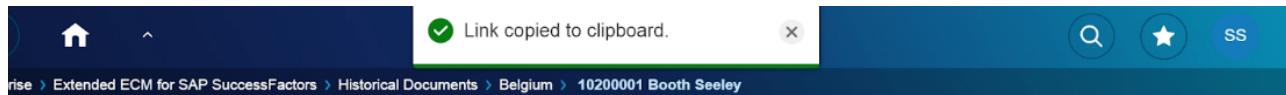
Copy link

ature allows you to copy the folder link to the clipboard. Select the item and click on

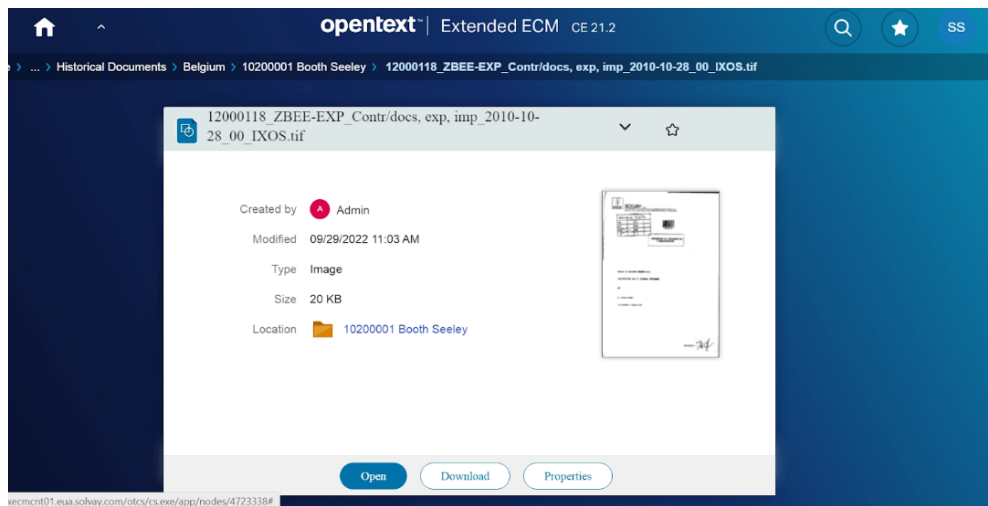
Copy link



k will be copied to the clipboard. This is confirmed by the message pop up as shown below.



in share this copied link with others who have relevant permissions and if they open this link in the browser, they can see this document details, can
nd download that document as shown below.

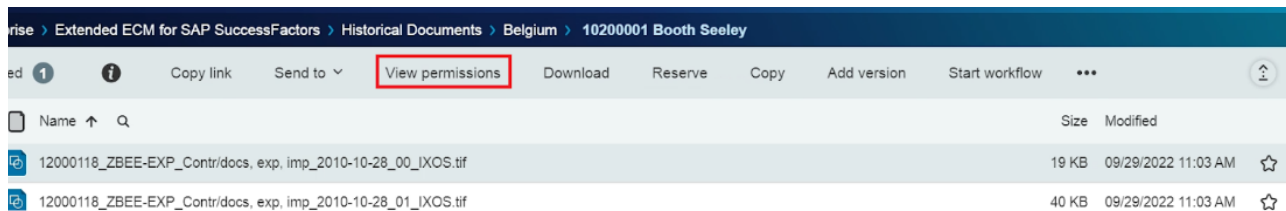


Permissions

ature displays the permissions that are granted to users and groups with respect to the selected document.

the item and click on

View permissions



ow like the one below will display the permissions of the selected item.

opentext | Extended ECM CE 21.2

Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley

1200001 Boot...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

00118_ZBEE-EXP_Contr/doc...

12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif

Enter name or group for permissions lookup

User / Group	Permission level
Admin	Full control
[Content Server Administration]	Read
Public Access	None
Business Administrators	Full control
CS - Data Admin / SC - Granted	Read
xECM - Test	Read
Correia, Paulo	Custom
Mathew-ext, Nikhita	Custom

load

ature can be used to download the document into your local system. Select the item and click on  .

Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley

1 Copy link Send to View permissions **Download** Reserve Copy Add version Start workflow ...

Name	Size	Modified
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif	19 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM

will start downloading to your system as shown below.

opentext | Extended ECM CE 21.2

Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley

1 Copy link Send to View permissions Download Reserve Copy Add version Start workflow ...

Name	Size	Modified
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif	19 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IXOS.tif	49 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IXOS.tif	43 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IXOS.tif	42 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_05_IXOS.tif	44 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_06_IXOS.tif	53 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_07_IXOS.tif	16 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_08_IXOS.tif	37 KB	09/29/2022 11:03 AM

0118_ZBEE-EXP...tif

Show all

ch Documents

an search for the required documents in the current folder by clicking on the magnifying glass icon  as highlighted below.

Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley			
10200001 Booth Seeley			
Name	Size	Modified	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif	19 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IXOS.tif	49 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IXOS.tif	43 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IXOS.tif	42 KB	09/29/2022 11:03 AM	

1 the name of the document. You will find the document as shown below.

opentext Extended ECM CE 21.2			
Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley			
10200001 Booth Seeley			
Q 12000118_ZBEELETJUB_5 X	Size	Modified	
12000118_ZBEELETJUB_Sen prem letter/calco_2010-10-28_15_IXOS.tif	35 KB	09/29/2022 1:11 PM	

Documents

in filter the documents by type by clicking on the filter icon



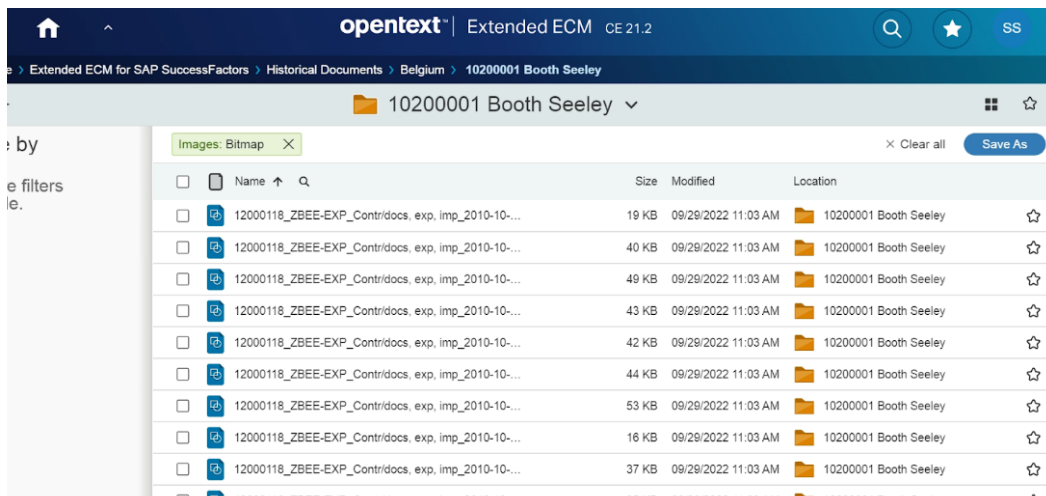
as highlighted below.

Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley			
10200001 Booth Seeley			
Name	Size	Modified	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif	19 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IXOS.tif	49 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IXOS.tif	43 KB	09/29/2022 11:03 AM	
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IXOS.tif	42 KB	09/29/2022 11:03 AM	

criteria selection screen will appear . Click on the required criterias to filter the documents as shown below.

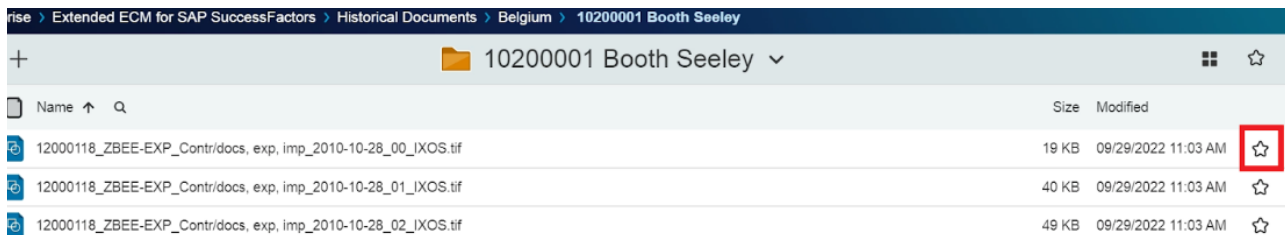
opentext Extended ECM CE 21.2			
Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley			
10200001 Booth Seeley			
ie by	Name	Size	Modified
ap 16	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_00_IXOS.tif	19 KB	09/29/2022 11:03 AM
os 16	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM
is 16	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IXOS.tif	49 KB	09/29/2022 11:03 AM
	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IXOS.tif	43 KB	09/29/2022 11:03 AM
	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IXOS.tif	42 KB	09/29/2022 11:03 AM
	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_05_IXOS.tif	44 KB	09/29/2022 11:03 AM
	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_06_IXOS.tif	53 KB	09/29/2022 11:03 AM
	12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_07_IXOS.tif	16 KB	09/29/2022 11:03 AM

ample, clicking on the **Bitmap** filter criteria will list all the .tif files as shown below.



g Favorite Documents

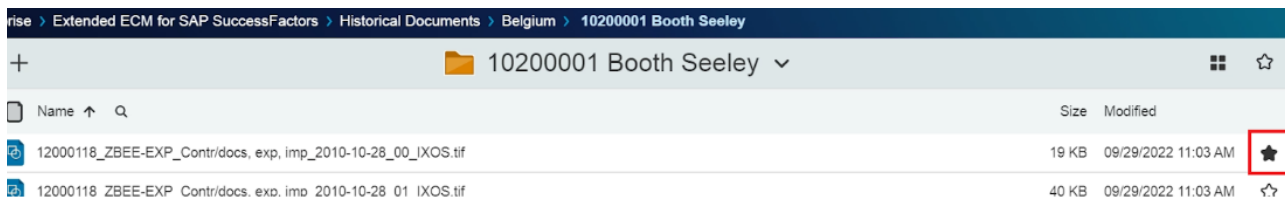
: Navigate to the document you want to mark as favorite as shown below and click on



: A pop-up similar to below will be displayed. Change the name of the favorite as required and click on



successful favorite addition, The icon in front of the document will change from  to  as shown below.



onal ways to perform actions on document

in hover your mouse pointer over the document and additional actions will be displayed. The actions are explained below. These individual actions steps to perform them are already explained above.

ise > Extended ECM for SAP SuccessFactors > Historical Documents > Belgium > 10200001 Booth Seeley

+ 10200001 Booth Seeley

Name	Size	Modified
12000118_ZBEE-EXP_Contr/docs, exp, imp_20...	19 KB	09/29/2022 1:32 PM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_01_IXOS.tif	40 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_02_IXOS.tif	49 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_03_IXOS.tif	43 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_04_IXOS.tif	42 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_05_IXOS.tif	44 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_06_IXOS.tif	53 KB	09/29/2022 11:03 AM
12000118_ZBEE-EXP_Contr/docs, exp, imp_2010-10-28_07_IXOS.tif	16 KB	09/29/2022 11:03 AM

- **Properties** : Displays the properties of the document.

- **Copy link** : Copies the link of the document to clipboard

- **Send to -> Mail as link** : This Feature needs a browser extension but that is not enabled in Syensqo environment so it cannot be used.

- More actions like View Permissions, Download, Reserve, Copy, Add Version, Start Workflow and View Document.

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