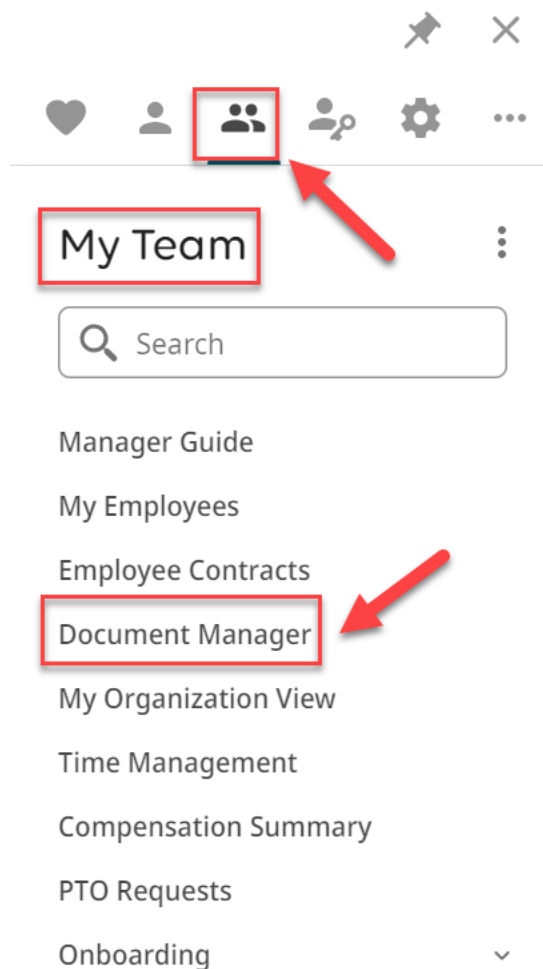


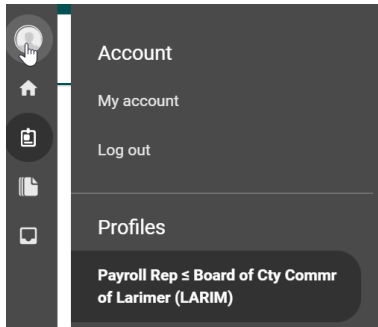
Document Upload Instructions

On the navigation menu, click on My Team, then Document Manager. This will open another window to the Document Manager module.

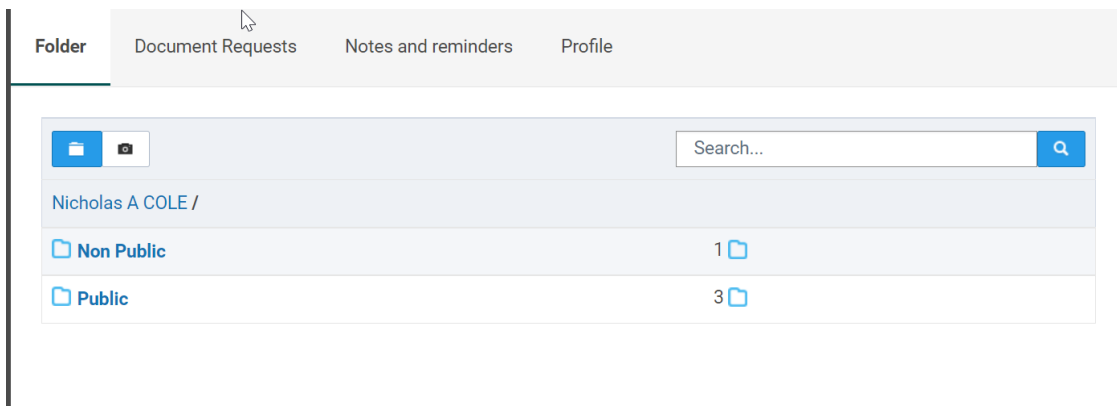


In the Document Manager module, you will either land on the Home page or Employee search page. Either is fine but ultimately you will want to do a search for the employee you are uploading the document for.

Note: Before you begin your search, make sure you are on the Payroll Rep profile.

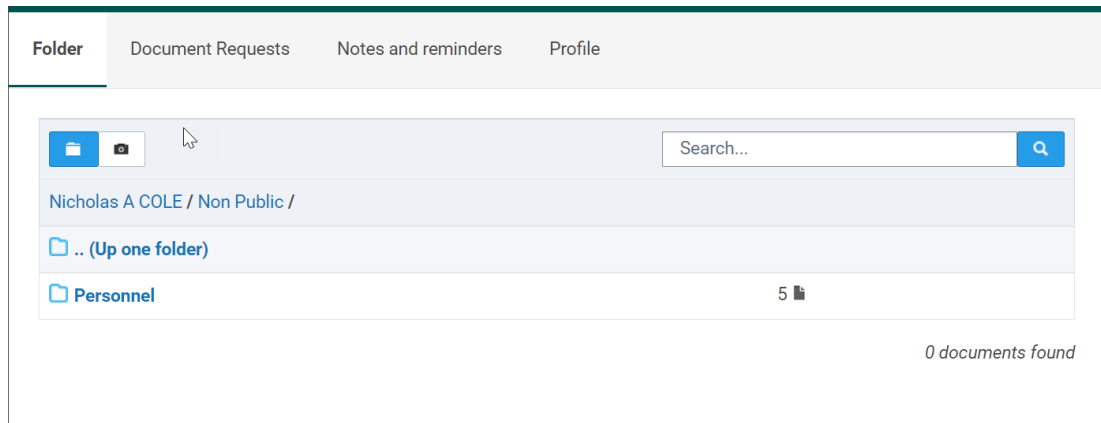


Once you have searched for your employee, you will see two folders: Non Public and Public. Reference the document list to determine where to upload your document. In most cases, you are going to select the Public folder since that will contain all document types related to regular payroll and personnel actions.

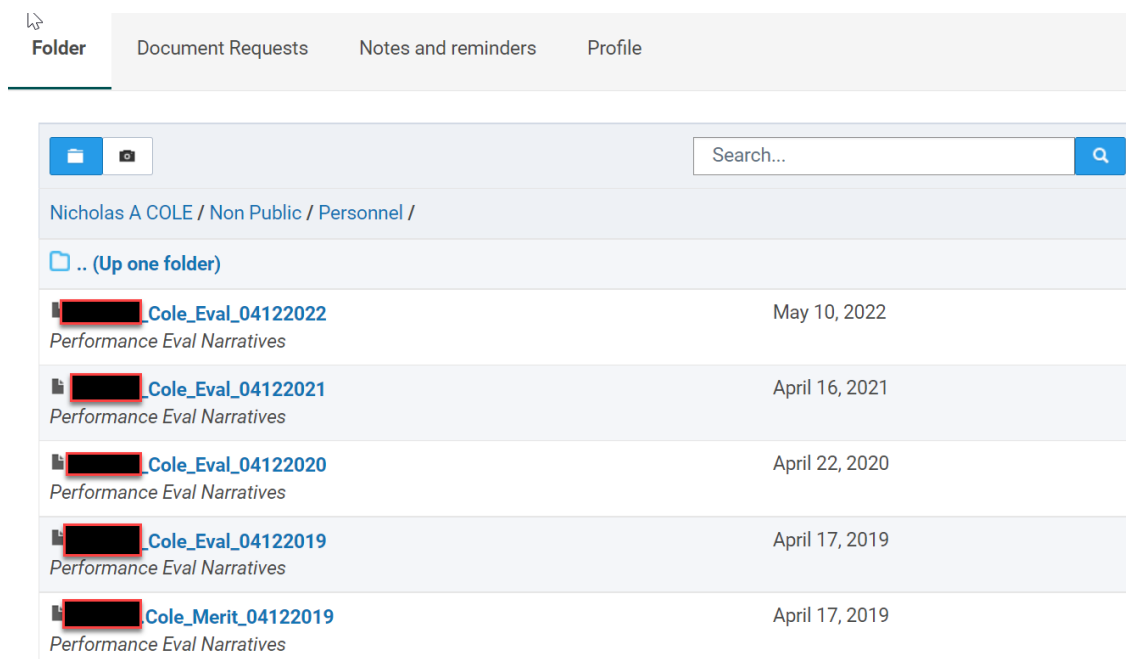


For performance evaluations that contain narratives, you will want to choose Non Public. Note that if you choose Non Public, you will only see one document type during the upload process: Performance Eval Narratives. Thus, if you are uploading another document type, you will know you are in the wrong subfolder and will want to go back and choose Public. Although rare, if the performance evaluation you are uploading does not contain any narratives and is only ratings (e.g. bar graphs or with only ratings of Good, Outstanding, Meets Expectations), you will want to choose the Public folder/Personnel and the Performance Eval – Ratings Only document type. There are very few departments that use ratings only so most of you will not need to worry about this distinction. Rest assured, if you upload them to the Non Public folder, that will be acceptable.

In each parent folder there are subfolders. The Payroll Rep permissions grant you access to one subfolder in the Non Public parent folder: Personnel. In the example below, you can see the number 5 with a file image next to it. This indicates that there are 5 documents in this employee's Non Public Personnel subfolder.



Clicking on the Personnel subfolder will permit you to see all the document types assigned to this subfolder for this employee. This may be a good way to determine if the document you are uploading already exists in the employee's record or if you need to continue uploading.



From here you can click on UPLOAD in the upper right corner, and you will now see the upload page.

Note: By clicking upload in the upper right, you will see in the image below that you are uploading to just the employee's name and no path has been specified. Be sure to reference the document list to ensure you select the correct document type. The document type drop down will list ALL document folders and document types. As you get acquainted with document manager, you may find this to be relatively painless. If you are unsure, you can go back up one folder and go to the page with Non Public and Public

folders, and select the desired folder to choose the correct path to upload to and they will fill in accordingly.

Folder Document Requests Notes and reminders Profile

Upload to: Nicholas A COLE /

Document*: No file chosen

Document Type*:

Title: Append : [File Name](#) / [Document type](#) / [Employee name](#)

Document Date:
If the date is not specified, the date displayed in the interface for this document will be the date the document was uploaded.

[Advanced options](#) ▼

When loading performance evaluations with narratives, be sure you are uploading to the Non Public folder.

Folder Document Requests Notes and reminders Profile

Upload to: Nicholas A COLE / **Non Public** /

Document*: No file chosen

Document Type*:

Title: Append : [File Name](#) / [Document type](#) / [Employee name](#)

Document Date:
If the date is not specified, the date displayed in the interface for this document will be the date the document was uploaded.

[Advanced options](#) ▼

Please title the document using the following naming convention:
EmplID.LastName_Action_EffectiveDate (ex: 012345.Smith_Evaluation_05.01.2022). This provides the auditors with consistency and enables a clean export when necessary.

Tip: For quicker uploading, when saving the document to your local drive for upload, name it in the required convention. Then, when you go to title the document, click on the append hyperlink next to the Title field and it will populate the field with the file name.

Select the effective date of the action or document.

Once all fields have been completed, click on upload. Reminder, a preview of the document will load if it was uploading in PDF format. Any other file formats would need to be downloaded and then viewed. This is the less desired quick check (QC) process, as any time you hit download, a duplicate document is created in your Downloads folder on your local drive. Thus, if you find yourself doing this, we ask that you clear your download folders periodically to remove those from record.

Once you have verified that the document has been uploaded, please destroy the original.