View and Add a Team Member's Documents of Record

Sandwell
Metropolitan Borough Council

This guide outlines the steps to follow to access, view and add team member documents of record.

1. Navigate to Document Records

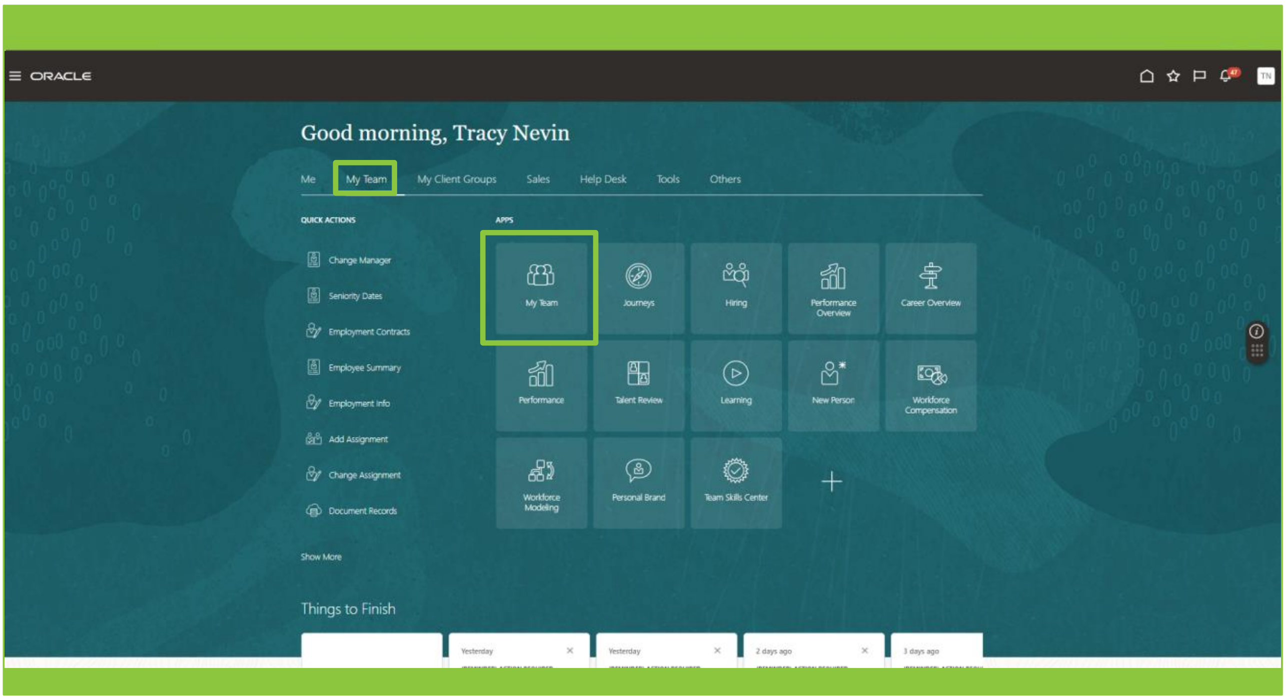
2. View existing document records

3. Add new documents

01

Documents of Record are key documents that may be uploaded to be stored in the Oracle Fusion document repository and attached to an employee's record.

To view the document records for a team member, firstly navigate to the **My Team** tab on the homepage. Next, select the **My Team** application.

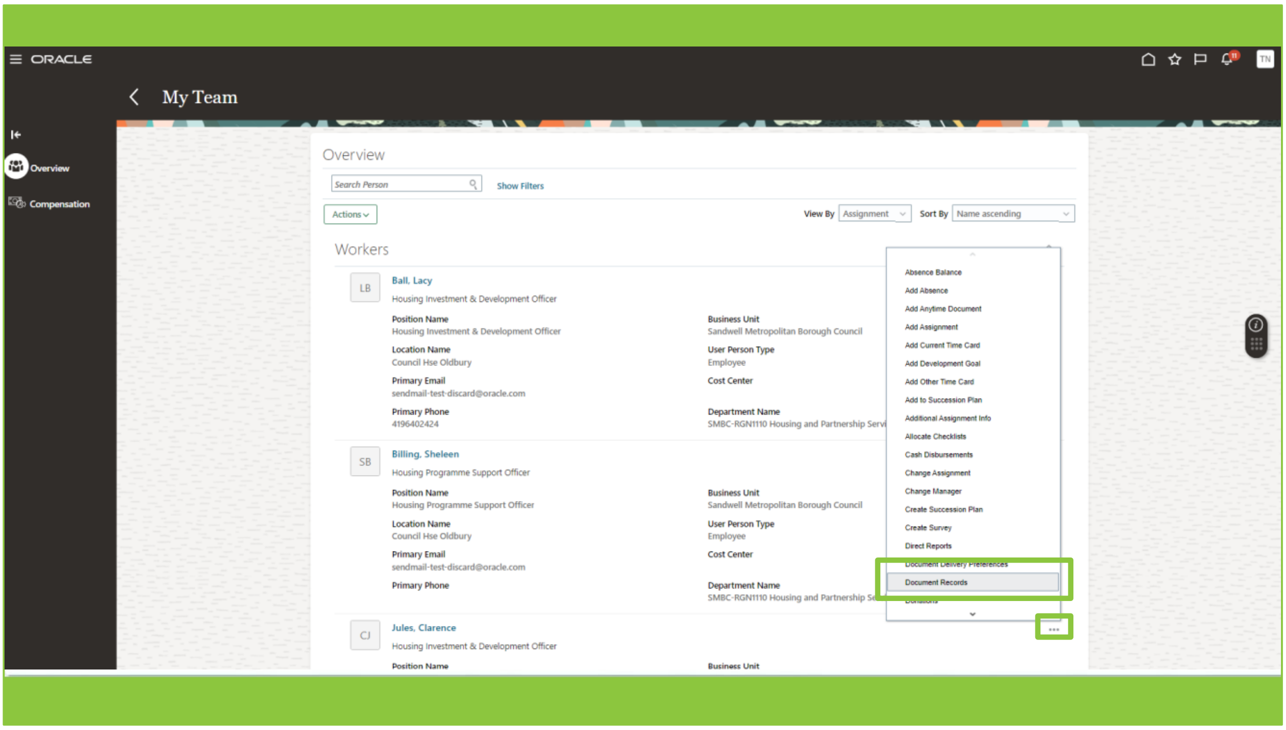


02

The **My Team Overview** page is displayed, and a list of your team members is visible.

Select the **three-dot** icon to the right of the relevant team member's name.

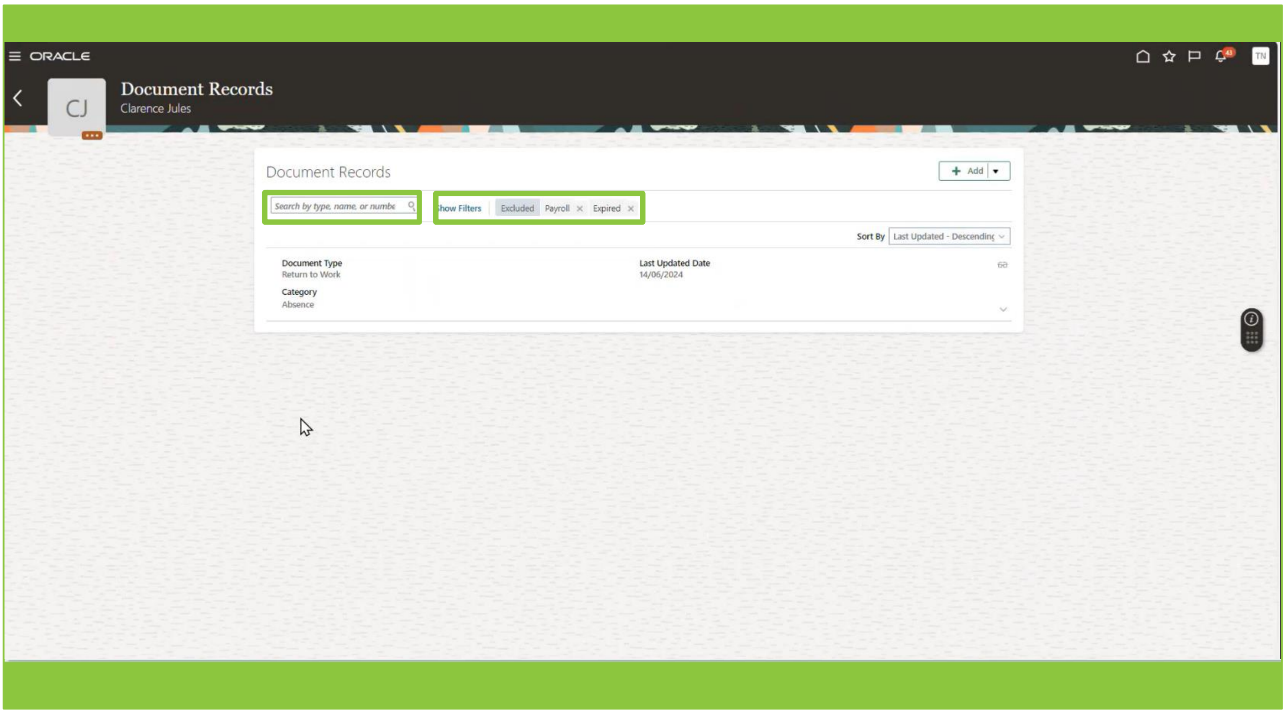
Choose **Document Records** from the pop-up options list.



03

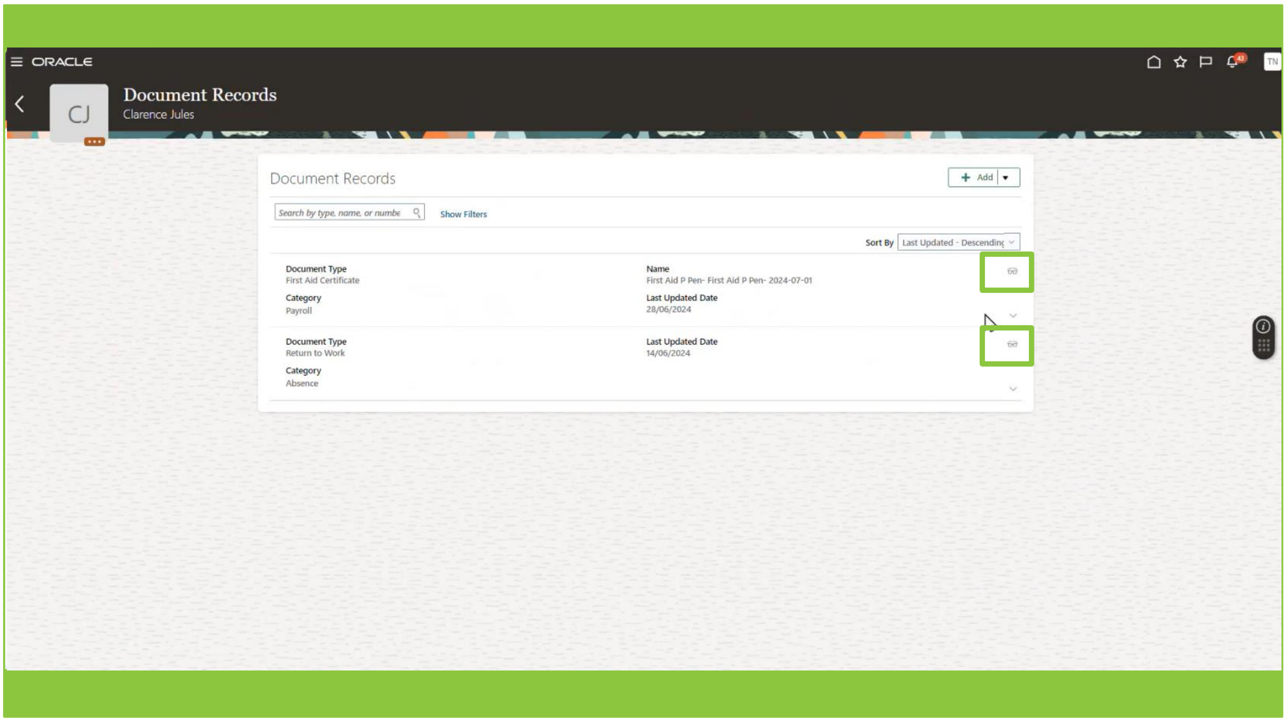
The **Document Records** page is displayed. The data displayed on the page may be changed by using the various filtering and sorting options.

If there are lots of documents displayed, you may use the search facility to search for a specific document.



04

To look at a document of record in more detail, select the **Spectacles** icon.

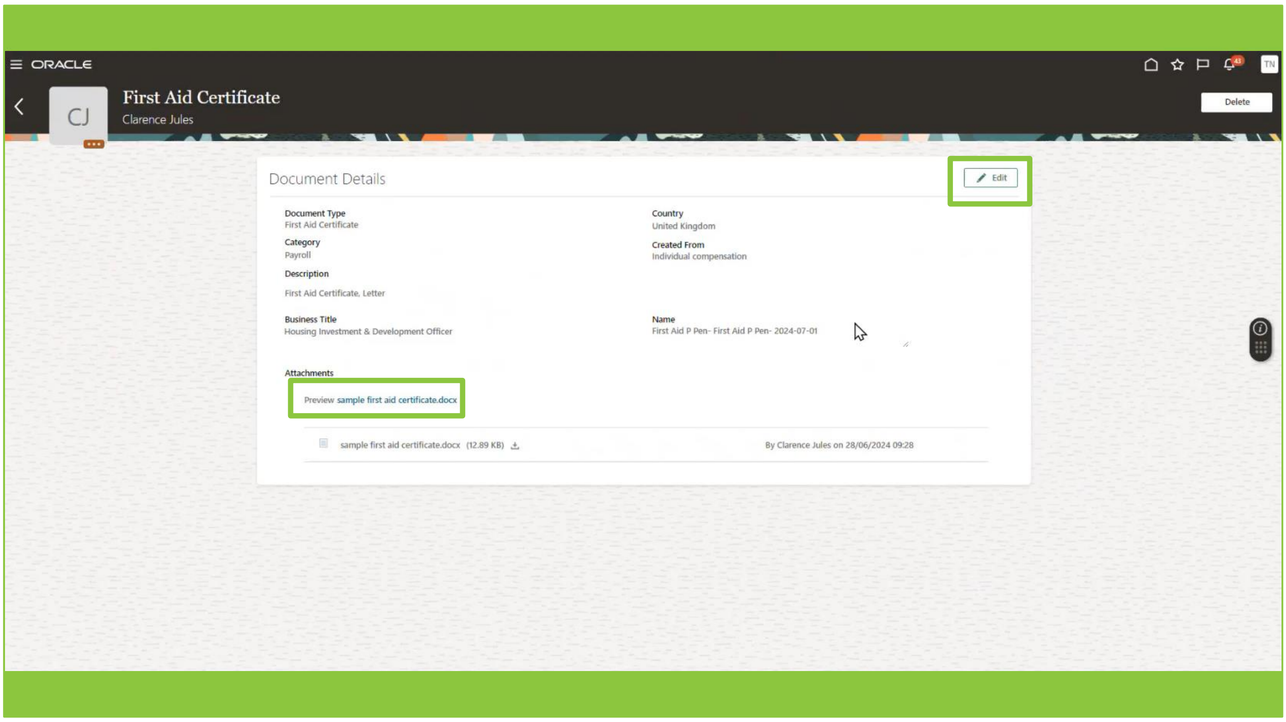


05

Here the user has decided to look at the document record relating to a first aid certificate.

Selecting the **Edit** button will open the editing window, and you are able to make changes to the record from here, including deleting the document if required.

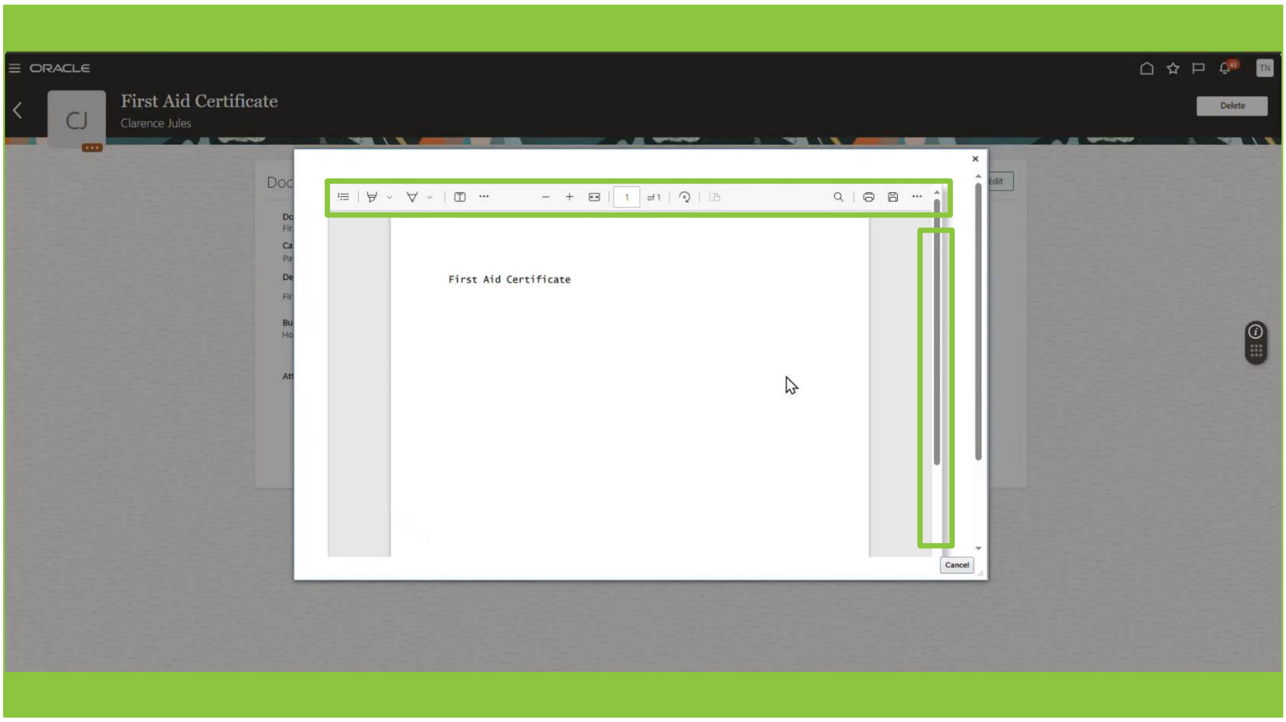
You can view the attached document by selecting the **blue text**. A document preview window will open.



06

You can scroll through, zoom in and out of and even rotate the document in the preview window.

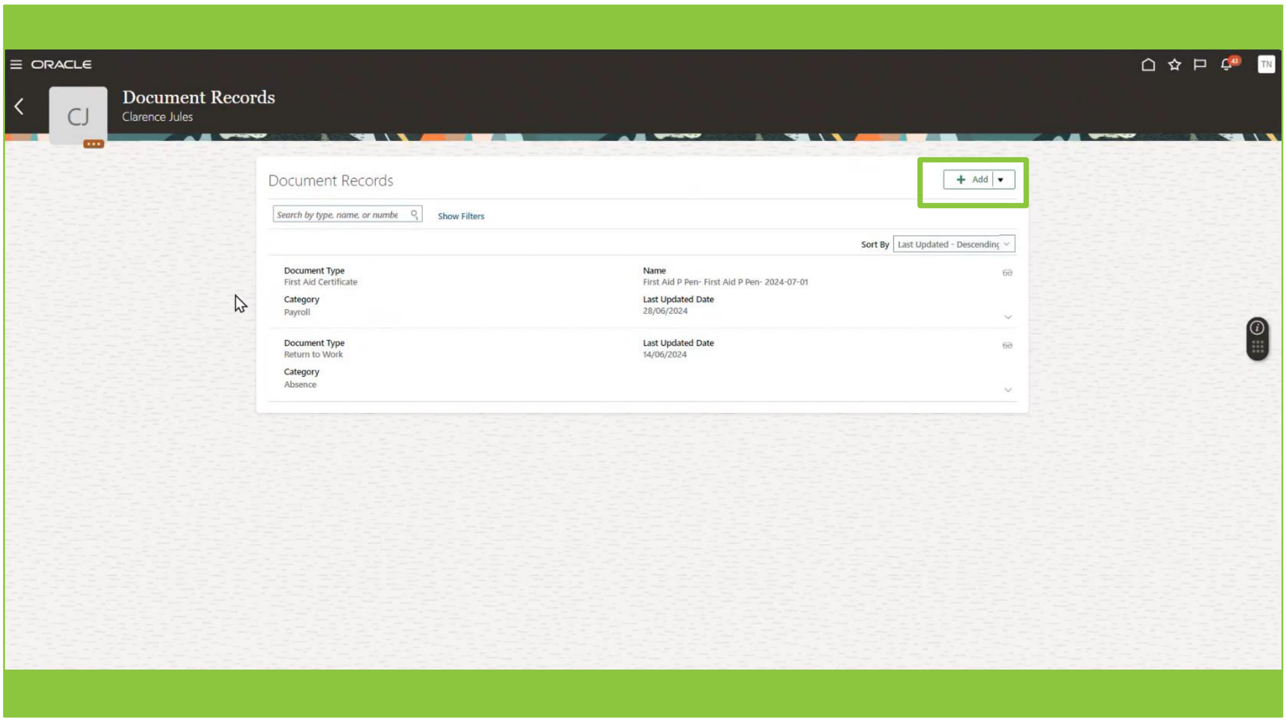
You are also able to annotate, print or save the document.



07

If you wish to add a new document to record to a team member's file, repeat steps 1 to 3 in this guide to return to the **Document Records** page.

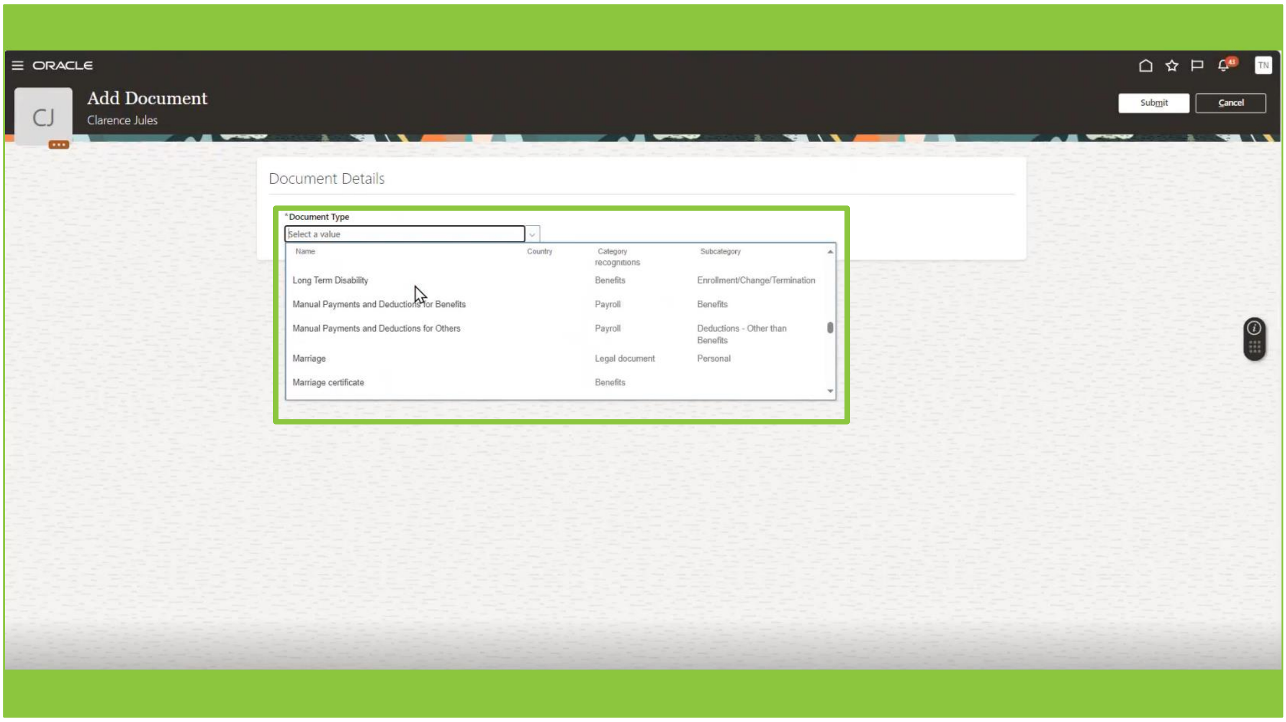
Select the **Add** button.



08

The **Add Document** window opens.

Select the **Document Type** field, and then choose the type of document that you wish to add to the record from the drop- down list of options.

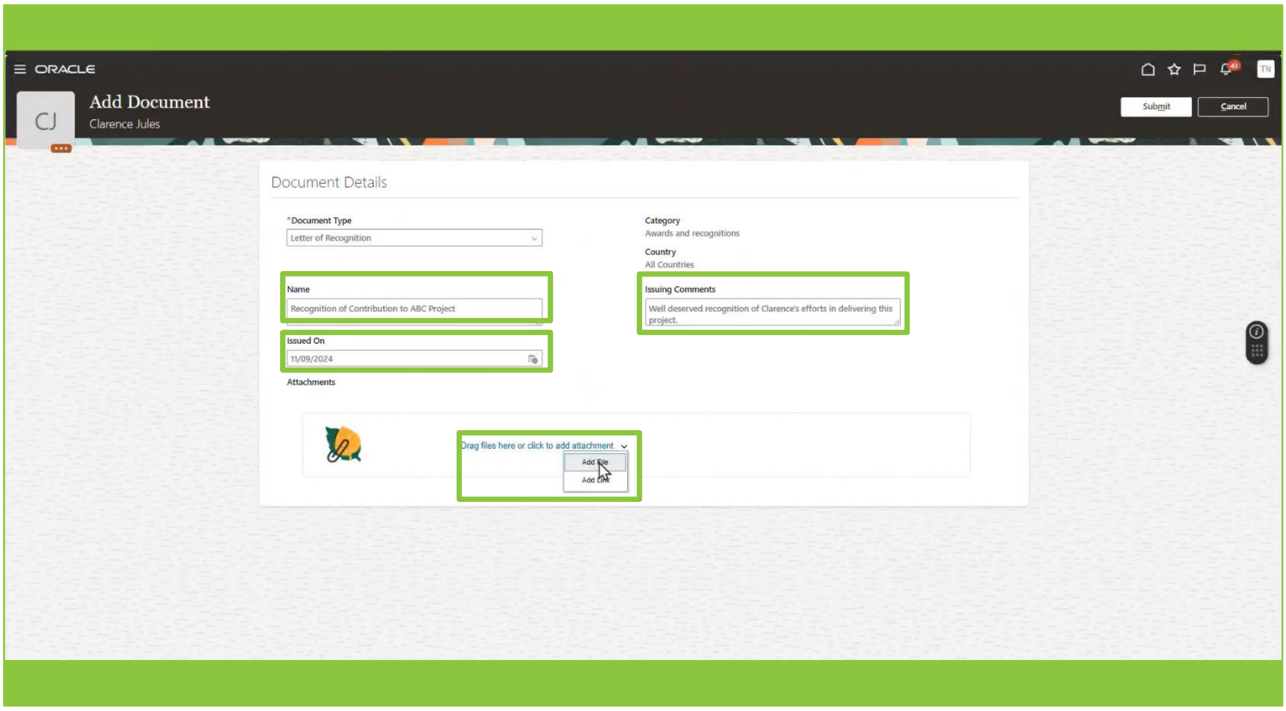


09

Once a document type has been selected, more fields will appear. These fields may differ dependent upon the document type selected.

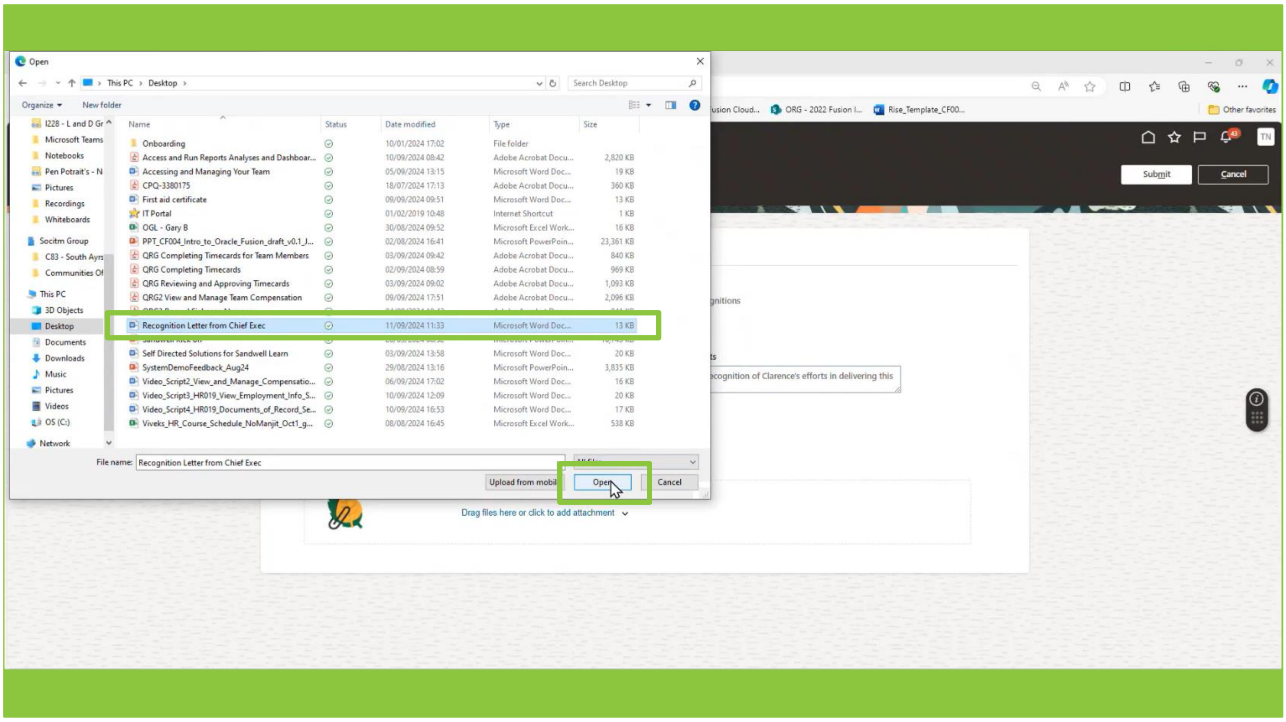
Here we can see the user has added a document **Name**, a document **Issued Date** and a **Comment.**

To add a copy of the document to the record, select the **add attachment** blue text, and choose the **Add File** option from the drop-down list.



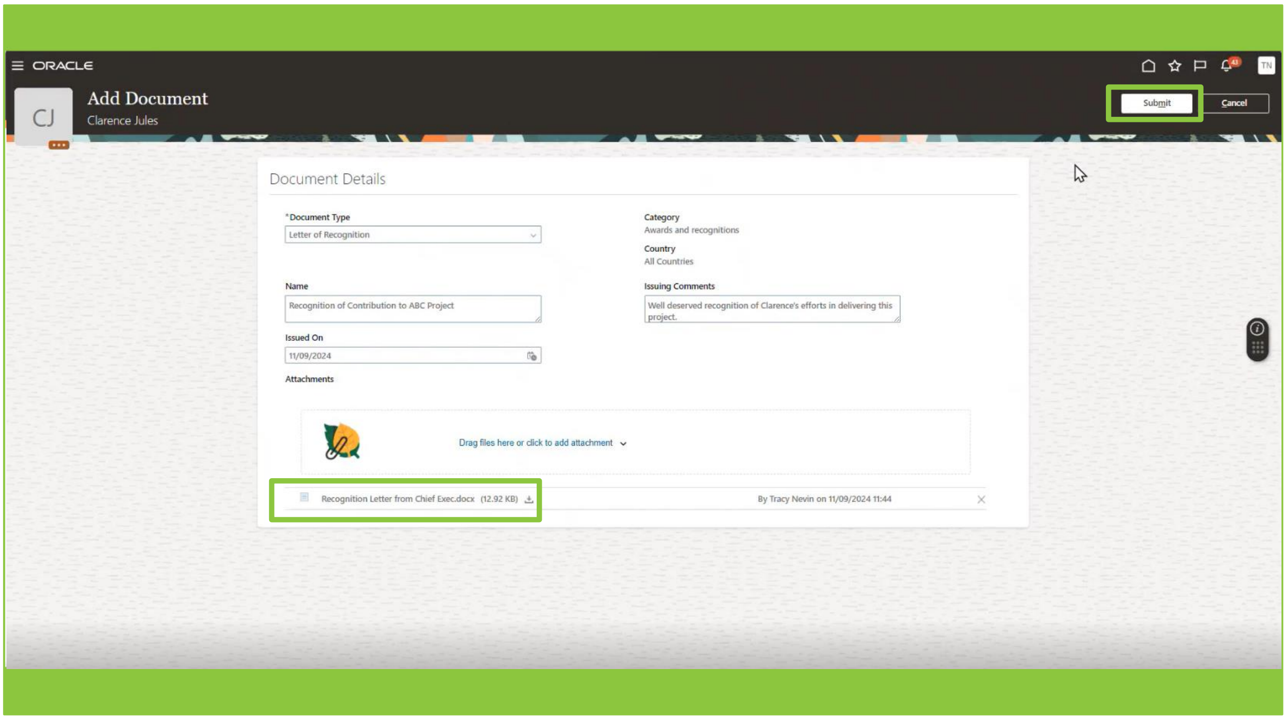
10 A file explorer window opens. Navigate to the document that you wish to add to the record and select it.

Next, select the **Open** button.



11 The document has now been attached to the request.

To complete the process, select the **Submit** button and the document record will be updated.



That brings this Quick Reference Guide to a close.