

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



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.

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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.

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	CJ Jules, Clarence Housing Investment & Development Officer Position Name	Business Unit	

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.

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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.

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< 7	First Aid Certifi	cate			Delete
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		Category Payroll Description	Created From Individual compensation		
		First Aid Certificate, Letter			
		Business Title Housing Investment & Development Officer	Name First Aid P Pen- First Aid P Pen- 2024-07-01		0
		Attachments Preview sample first aid certificate.docx			
		sample first aid certificate.docx (12.89 KB) 👌	By Clarence Jules on 28/06/2024 09:28		

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.

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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.

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				Document Type Return to Work		Last Updated Date	6		
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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.

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	Manual Payments and Deductions for Others	Payroll	Deductions - Other than Benefits	•	
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	Marriage certificate	Benefits			

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.

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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.

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The document has now been attached to the request.

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

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	Document Details			¢	
	*Document Type Letter of Recognition v	Category Awards and recognitions Country All Countries			
	Name Recognition of Contribution to ABC Project Issued On	tsuing Comments Well deserved recognition of Clarence's efforts in delivering this project.			0
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That brings this Quick Reference Guide to a close.