
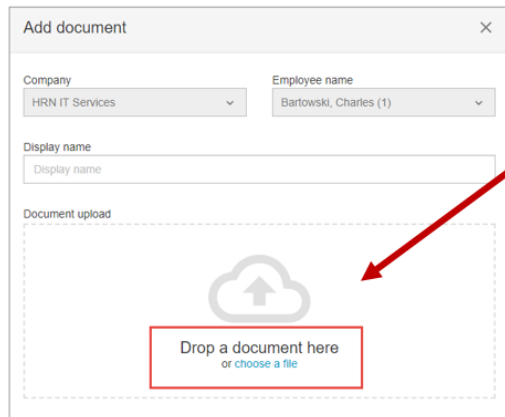


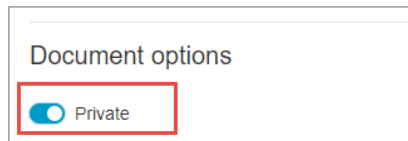
To mark an employee document as private in Advanced HR 2.0:

1. Admins go to **HR Admin – Employee Maintenance – Document (employee)** / Managers go to **Manager Service / Employee Maintenance – Document (employee)**.
2. The system displays the **Employee Documents** screen.
3. Using the company and employee search boxes at the top of the screen, select the company and the employee to whom you want to associate the document with, if not already selected.
4. The system displays the **Employee Documents** screen for that employee listing all of their documents.
5. Click the **Add Document** button 
6. The system opens the **Add Document** screen in a drawer from the right side of the screen.
7. Enter a **Display Name** for the document.
8. In the **Document upload** section of the screen, drag the document you want to upload and associate to this employee to the **Drop a Document Here** section. Or, you can click the **Choose a File** link and browse to the document.

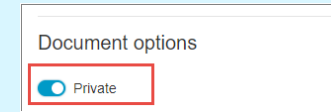


Drag the document to this area of the screen or, click the **choose a file link** and browse to the document.

9. In the **Document Options** section of the screen, set the **Private** toggle to **On**. The default setting for this option is **Off**.



10. Click the **Upload Document** button at the bottom of the screen



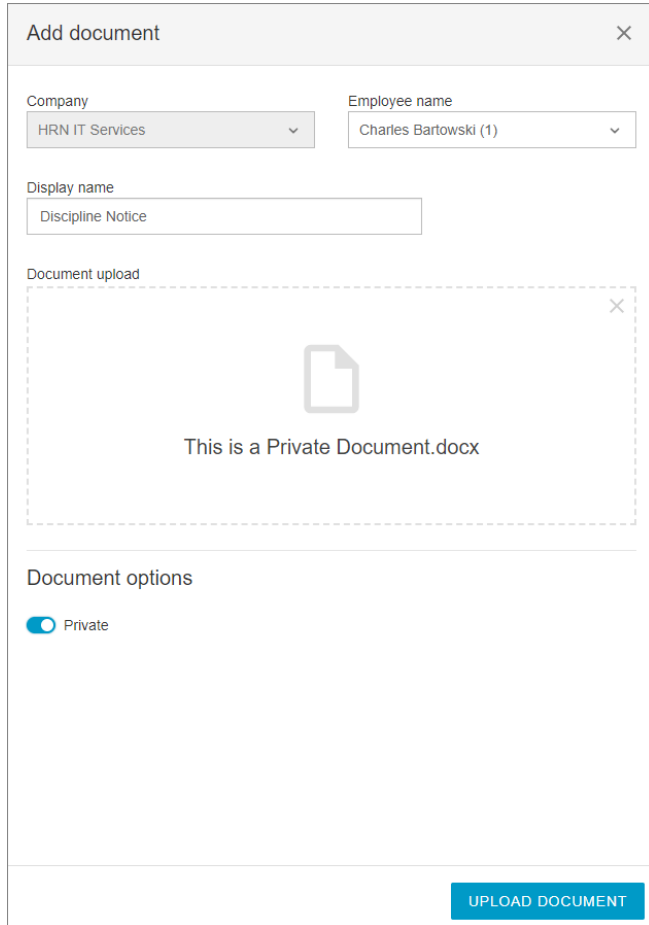
Admins and Managers have the ability, when adding a non-signature document to be associated with an employee, to mark the document as **Private**. This is done on the Employee Documents (Add Document) screen.

An employee discipline note or feedback from someone else might be an example of a document to be marked as Private by the Admin / Manager.

When a document is flagged by the Admin/Manager as Private, the employee will not see or have access to the document in their **My Documents** screen.

In earlier versions of Advanced HR, it was possible to mark a document as Private; this is a new iteration of that feature in order to provide the same functionality in the new Document interface. If a document had been marked as Private in the legacy system, it will still be flagged as Private in the new interface. Any new documents associated with an employee will, by default, not be marked as Private.

A sample completed **Add Document** screen is shown on the next page.



Add document [X]

Company: HRN IT Services [v] Employee name: Charles Bartowski (1) [v]

Display name: Discipline Notice

Document upload: [X]
This is a Private Document.docx

Document options: Private

UPLOAD DOCUMENT

In this example, because the Admin/Manager set the **Private** Document Option to **On**, the document is added to the system and associated to the employee but note that the employee will not see or have access to the document in their **My Documents** screen.

Only the Admin/Manager roles will be able to view and access the document as follows:

- Admins from their **HR Admin – Employee Maintenance – Document Employee** screen
- Managers from their **Manager Service – Employee Maintenance – Document Employee** screen.