

MyTeam Documents

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Introduction

As a manager you can view and upload documents relating to your employee directly to their personal file in MyView. This is a filing facility only so you must only upload documents that do not have contractual or financial implications and do not require further action.

Folder Categories

There are 7 standard folders available within the MyTeam Documents facility:

- **Conduct & Performance** - *this file has view and upload access*
- **Contractual** - *this folder is view only*
- **Leave** – *this file has view and upload access*
- **Resignation** – *this file has view and upload access*
- **Resourcing** – *this is view only view only*
- **Sickness** – *this file has view and upload access*
- **Training** – *this file has view and upload access*

The information contained within these folders is as follows:

Conduct & Performance – correspondence relating to disciplinary and grievance.

Contractual – SEPs, standard letters, recruitment pack and other contractual arrangements.

Sickness – Sickness information including correspondence, Welcome Back forms and Occupational Health information, Incident Report Forms.

Leave – Maternity Leave, Leave of Absence forms, Paternity Leave, Banked Leave forms, etc., Employer Supported Volunteering.

Resignation – Resignation / contract termination communications, including “On The Move” letters

Resourcing – Job Profile for employees post.

Training – Training certificates, Learn Innovate Grow development discussions (previously ERD's) and Personal Development Plans.

File Naming Format

In order to make documents easy to find in the employees file / folders, before uploading, name the document according to the following format below:

Employee Number, Name of document, year, month, day

e.g. 123456 *Welcome Back Form 2017 09 01*

Save all documents with the date of the event in the letter (in this example this would be the welcome back meeting date).

Document Types

All types of Microsoft documents can be uploaded to MyView Doc Storage.

However, these must not have any contractual or financial implications.

Example Document File Names

The following is a list of example documents that can be uploaded because they do not have any contractual or financial implications.

123456 Attendance Meeting Invite 2017 09 13

123456 Attendance Meeting Outcome 2017 09 15

123456 DSE Assessment 2017 01 30

123456 LIGO Meeting Record 2017 09 01

123456 Improvement Action Plan 2017 09 01

123456 KIT Record 2017 09 01

123456 OH Report 2017 09 01

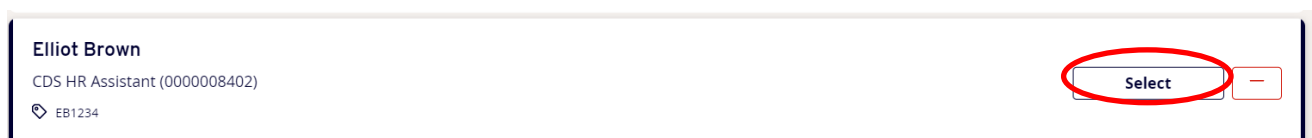
123456 Personal Development Plan 2017 09 01

123456 Stress Action Plan 2017 09 01

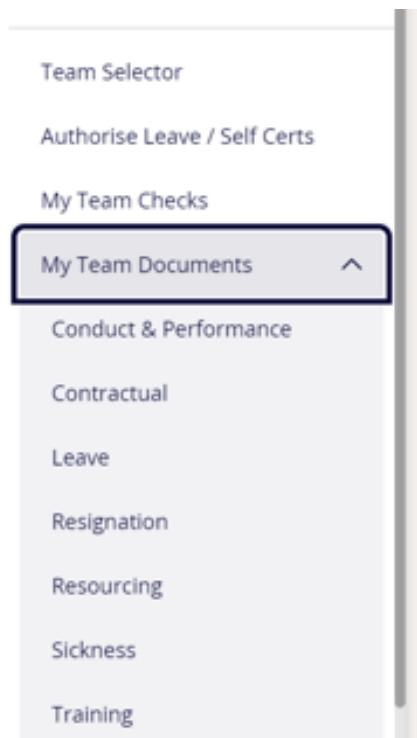
123456 Welcome Back 2017 09 01

How to View / Upload a Document

- In MyView, go to the **MyPeople** tab and click on **Select** against the applicable employee from Team Selector.

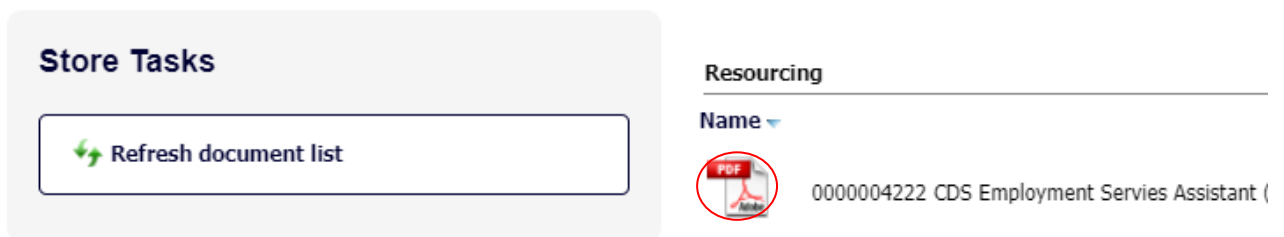


- On the left hand side menu, click on **MyTeam Documents** to access your employees personal files.
- Select the relevant folder you wish to access.

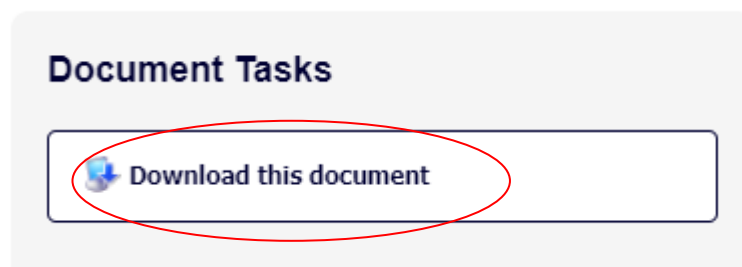


To View a Document

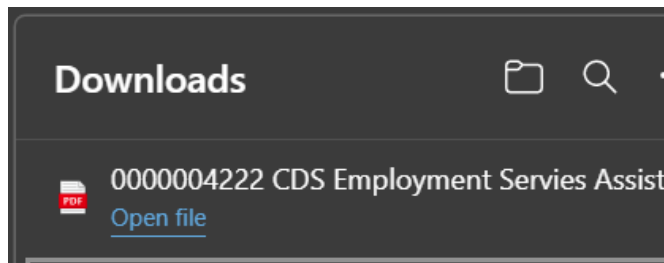
- Once the relevant folder has been selected, click on the document you wish to see.



- A new Document Tasks box appears on the left-hand side of your screen. Select **Download this document**



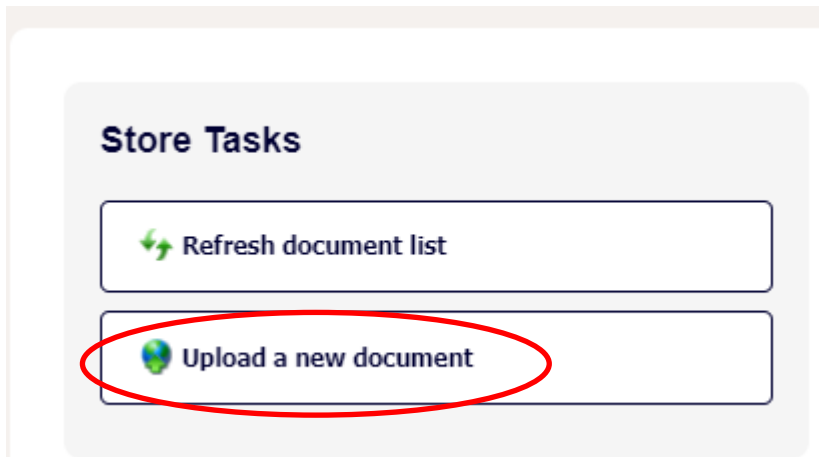
- You will be given the option to **Open** the document via a pop-up window for your **Downloads**.



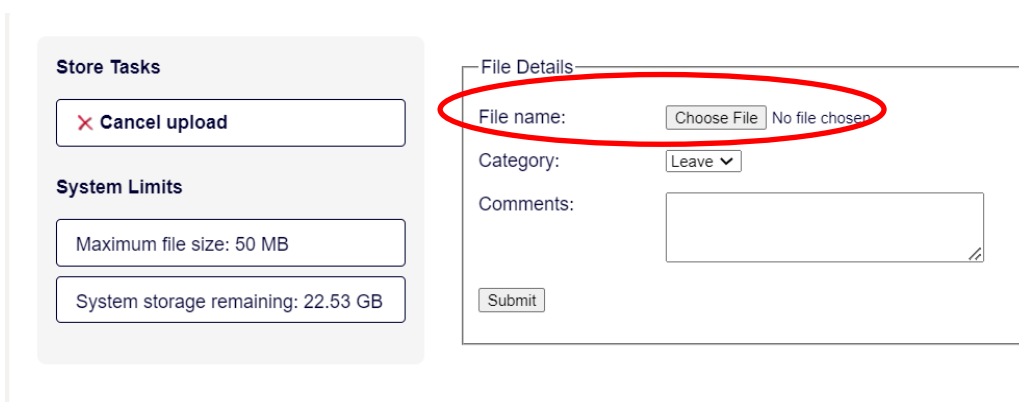
- Click **Open File** to view the document.

To Upload a Document

- Select **Upload a new document**.

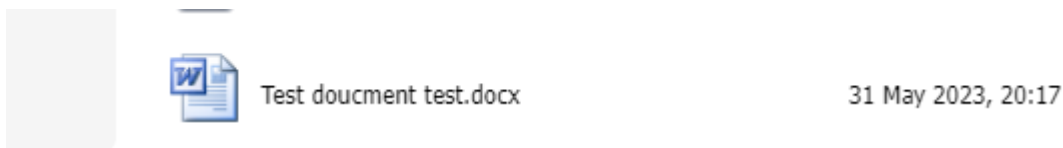


- Select **Choose File** to browse the document for upload.



- **Ensure the document you wish to upload has already been named to meet the File Naming Format.**
- Click **SUBMIT**

The saved document will appear within the relevant folder.



Please note no action will be taken on documents you have uploaded here as this is a filing facility only.

FAQ'S

1. When saving documents, what date should we use in the title?

You should use the date of the meeting or action.

2. Naming Formats – not all documents are on the list.

It isn't possible to cover all documents that may appear in someone's file on the list – as long as documents are named uniformly ([naming convention format](#)) within the personal file, with a relevant title.

3. Can we save emails with attachments?

Emails with attachments can be saved in MyView Doc Storage ensuring the naming convention format is applied. The user will be able to open them provided they have Outlook, which all users of PKC do have.

4. Can I upload a Flexible working request?

No. Although the flexible working request may not have a financial change, there may still be a contractual change. For example; the employee is continuing to work the same number of contracted hours each week just on different days, there is no financial change but there is a contractual change of working pattern required. Therefore, please ensure all Flexible Working paperwork is emailed as an attachment to the generic account of Employment and payroll services for retention on the employee personal file.

5. If the paperwork has a financial or contractual change what should I do with it?

Please email all paperwork as an attachment to the generic account HR@pkc.gov.uk to be retained as appropriate on the employee's personal file.

6. What should I do if I upload a document to the wrong folder or for the wrong employee?

Managers don't have access to delete files so please email HR@pkc.gov.uk and request for the file to be removed.