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## ADP Document Cloud®

# User Guide

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**Rev1**

## Chapter 1

# Using Document Cloud - *Employee*

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# Overview of My Documents

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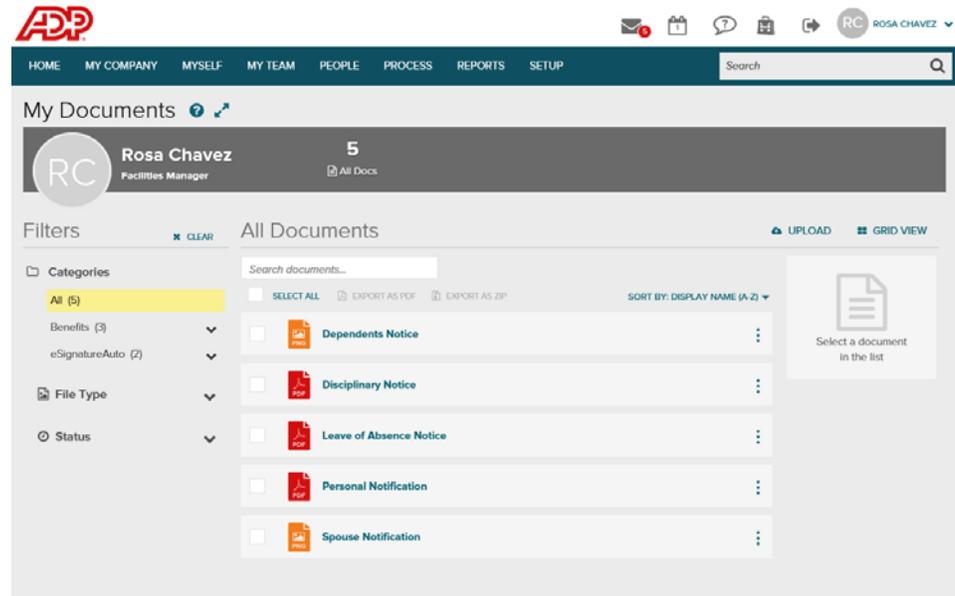
Your employer is required to keep and maintain many documents related to areas such as HR, Benefits, Recruiting, and Time. Employee document management allows you to view, print, download, export, and update your personal documents. These are the file types that you can upload.

PDF	RTF
DOC	MSG
XLS	CSV
VSD	HTM
JPG	MOV
BMP	TXT
PNG	GIF
TIF	ZIP
TIFF	JPEG
HTML	*MP4
DOCX	*MP3
PPTX	*AVI
XLSX	*WMV
PPT	

\*Video file types that are supported.

# Searching for an Employee Document

1. Select **Myself > Personal > My Documents**.



**Figure 1-1. My Documents**

2. Select the **Filters** you want to use to search for your documents. You can select from **Categories**, **File Type**, and **Status**. You can select one or more fields and the found documents are listed as you select a filter.
3. Click the result you want to access.

Select a document's check box to display the properties to the right of the document. If there is only one result, the document is selected and the properties of the document display.

# Uploading Your Document

Upload your employee documents and store them by specific category. There is no maximum number of documents that can be uploaded, however the maximum size of an individual file is 15MB.

1. Select **Myself > Personal > My Documents**.

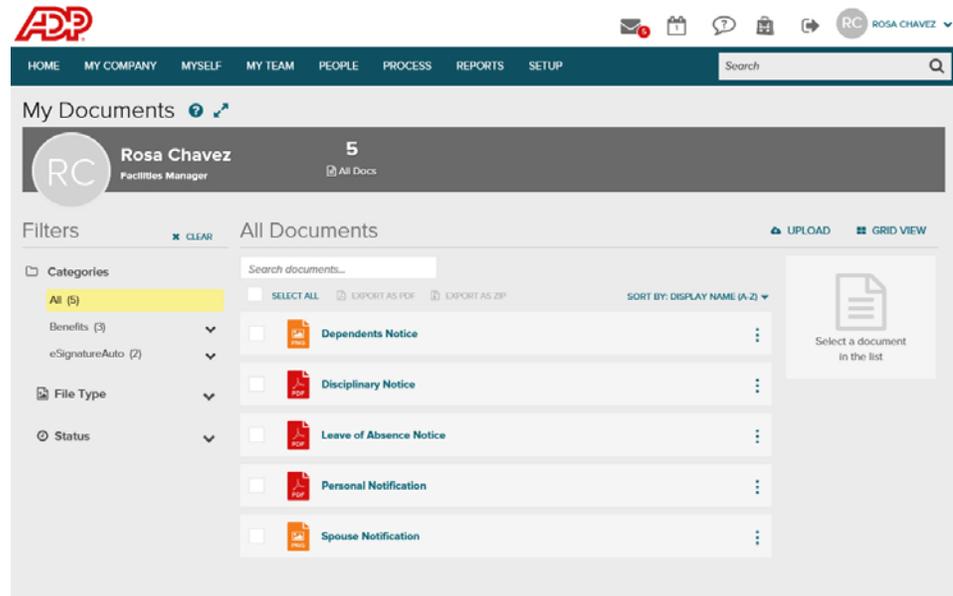
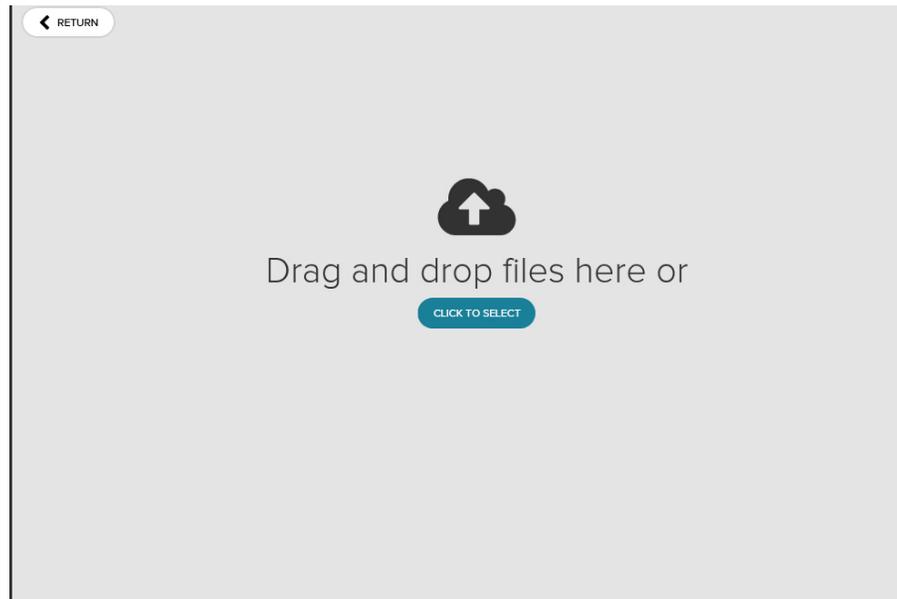


Figure 1-2. My Documents

2. Click  (upload)



**Figure 1-3. Upload**

- Select **Click to Select**. Browse to and select the document you want to upload and click **Open**.
  -  Depending on the browser you are using, you can select multiple documents to upload.
- Drag and drop one or more files into the **Drag and drop files** area. Press Cntrl and click on individual files or press Shift and click on continuous files. Continue to press the key and drag the files and drop them into the **Upload Documents** area.
-  If you select a category and subcategory before you drag and drop the files into the upload area, the files are automatically assigned to the selected category and subcategory.

- Regardless of how you upload the document, the Properties window opens.

**Figure 1-4. Document Properties**

- Complete the document properties. The properties can be used to identify and search for a specific document.
  - Enter a **Display Name**. The maximum length for the display name is 50 characters.
  - Select a **Category/Subcategory** for the document. Documents are organized based on the category and subcategory.
    - A category or subcategory is not available in your **Categories** section until it has a document assigned to it; so you may see the category or subcategory in this selection list but not in the **Categories** section.
  - Select an **Effective Date** to designate the date the document becomes effective. This is an optional field.
  - Select an **Expiration Date**. to designate the date the document is no longer valid. This is an optional field.
    - You can access the document and change the expiration date for the document if you want to keep viable for a longer period.
- Enter **Tags** to help you identify the document during a search. This is an optional field with a limit of 256 characters.
- Click **Save** and do one of the following:
  - Select **Save and Return**. The document is uploaded and you are returned to the **Employee Document** page.
  - Select **Save**. The document is uploaded and you remain on the Upload Documents window. You can then upload additional documents.

## Viewing an Employee Document

1. Select **Myself > Personal > My Documents**.
2. Search for the document you want to view. Only your personal documents are available to the search.

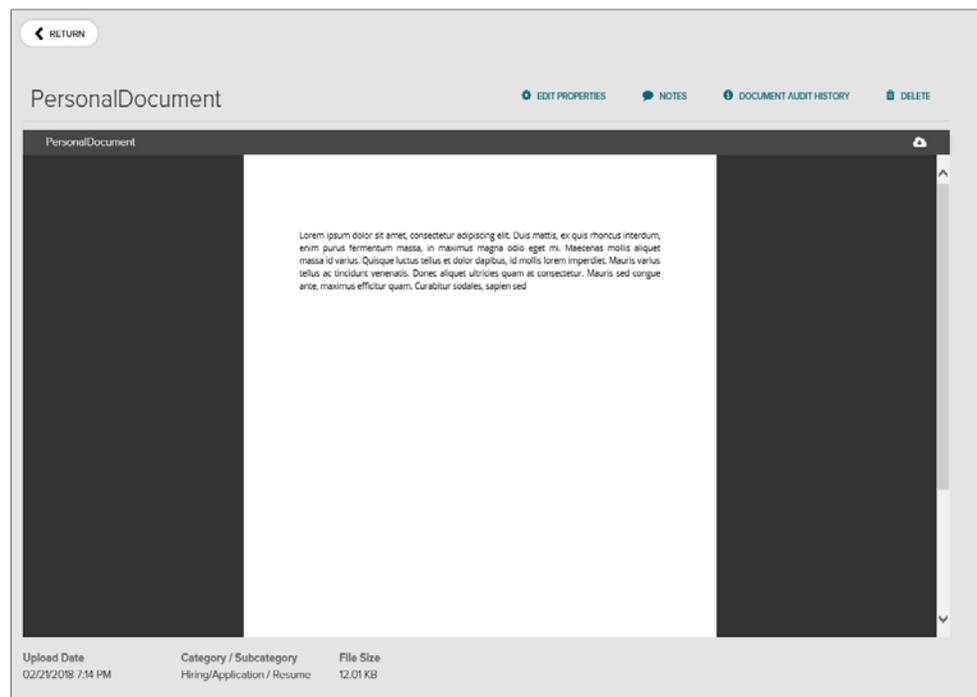


You can limit the display of documents by clicking on a specific category from the **Categories** section.

3. Click the name of a document. The document opens on a page.



Your document may take some time to be available. If you do not want to wait, you can download the document and view it locally.

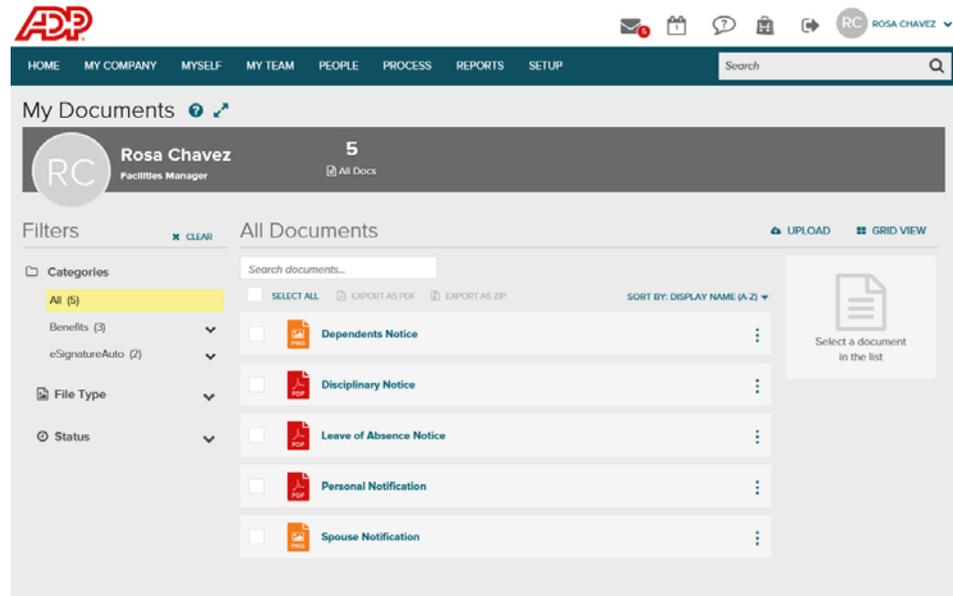


**Figure 1-5. Document Viewing**

4. Once available, you can view the document and do one of the following:
  - Use the document's icon to expand, shrink, zoom in, zoom out, print, or save the documents.
  - Edit the document's properties.
  - Add notes to the document.
5. Click **Return** you are finished.

# Deleting an Employee Document

1. Select **Myself > Personal > My Documents**.



**Figure 1-10. My Documents**

2. Select the check box for the document you want to delete. The properties of the document are listed in the preview pane on the right.
3. Click **⋮** (**action**).
4. Click **Delete**.  
 You cannot delete a document that requires an electronic signature.
5. Click **Confirm**.

# Electronically Signing a Document

You may get a notification in your message center that a document has been uploaded and assigned to you that requires your electronic signature. The message center notification will have a pending status in the Message Center until you have completed the electronic signature.

 If not done promptly, you may get a reminder that you have a pending document.

1. Select **Myself > Personal > My Documents**.

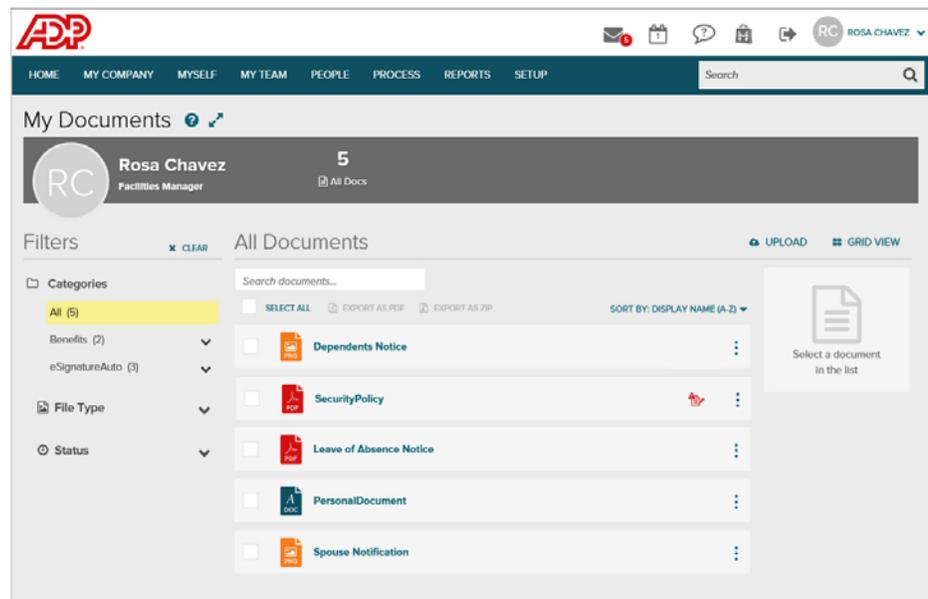
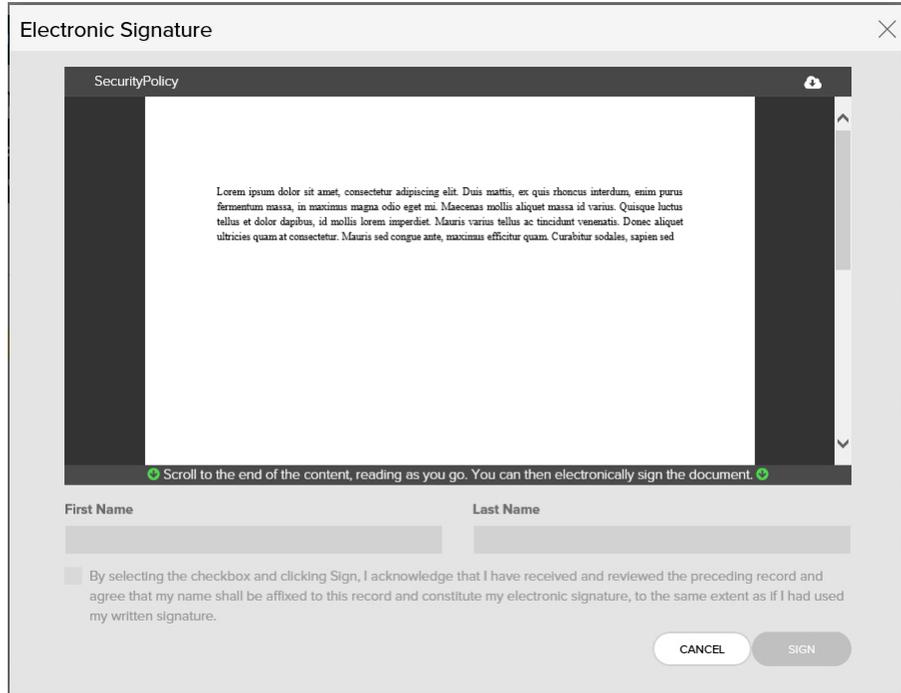


Figure 1-11. My Documents

2. Click  (**electronic signature required**) for the document requiring an electronic signature.



Electronic Signature

SecurityPolicy

Scroll to the end of the content, reading as you go. You can then electronically sign the document.

First Name

Last Name

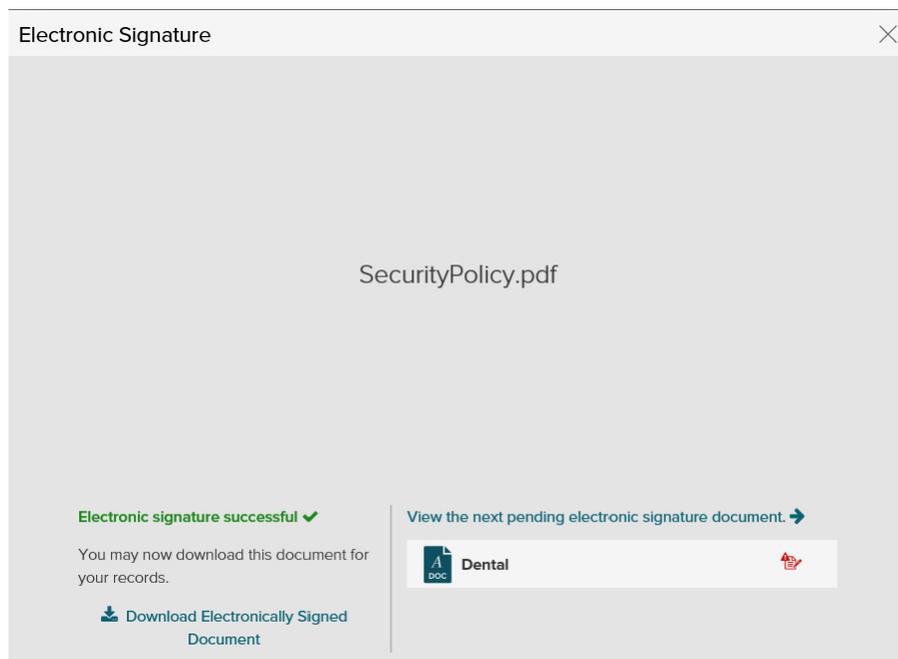
By selecting the checkbox and clicking Sign, I acknowledge that I have received and reviewed the preceding record and agree that my name shall be affixed to this record and constitute my electronic signature, to the same extent as if I had used my written signature.

CANCEL SIGN

**Figure 1-12. My Documents**

3. To sign the document electronically, scroll to the end of the document. Once you have done that, **First Name** and **Last Name** are available.
4. Enter your **First Name** and **Last Name**.

5. Accept the disclaimer and click **Sign**. Sign is not available until you accept the disclaimer.



**Figure 1-13. My Documents**

6. Do one of the following:
  - Click **Download Electronically Signed Document** and download your signed copy.
  - Click **View the next pending electronic signature document** to go to the next document requiring a signature.
  - Click  to close the Electronic Signature window.

A document that has been electronically signed is indicated by .

