



# TalentEd Records

by PeopleAdmin

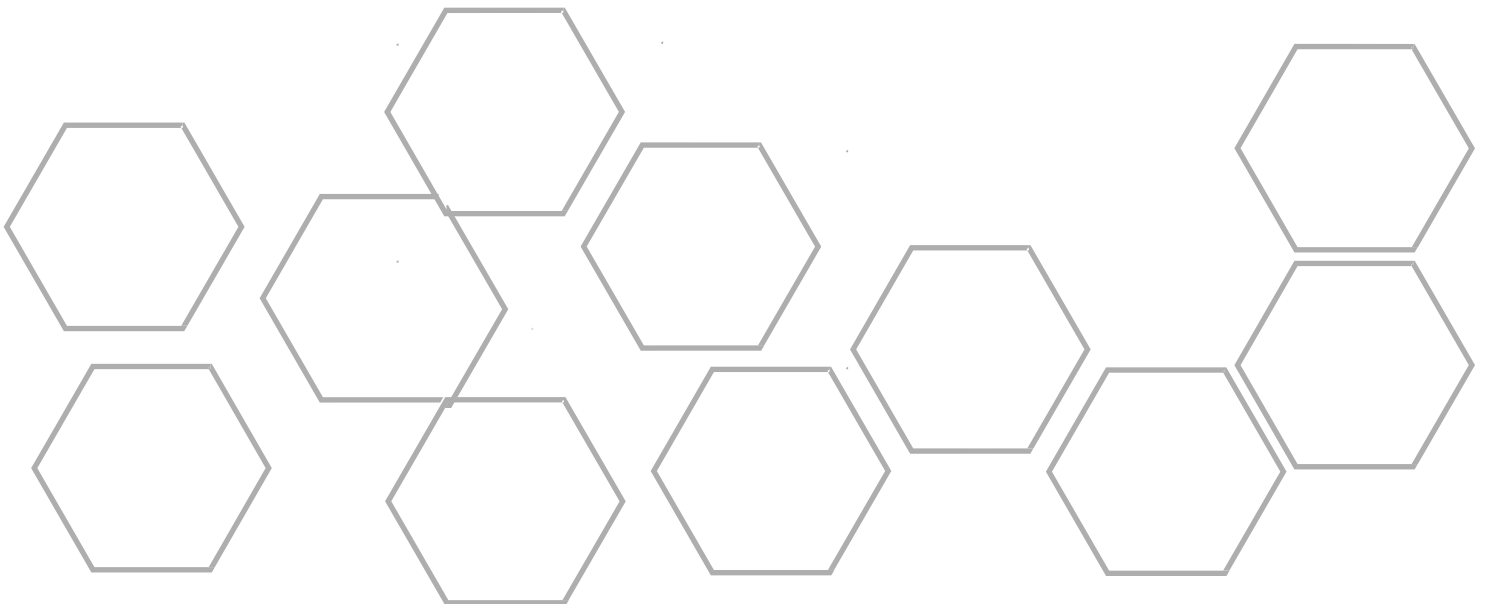
## End User Guide



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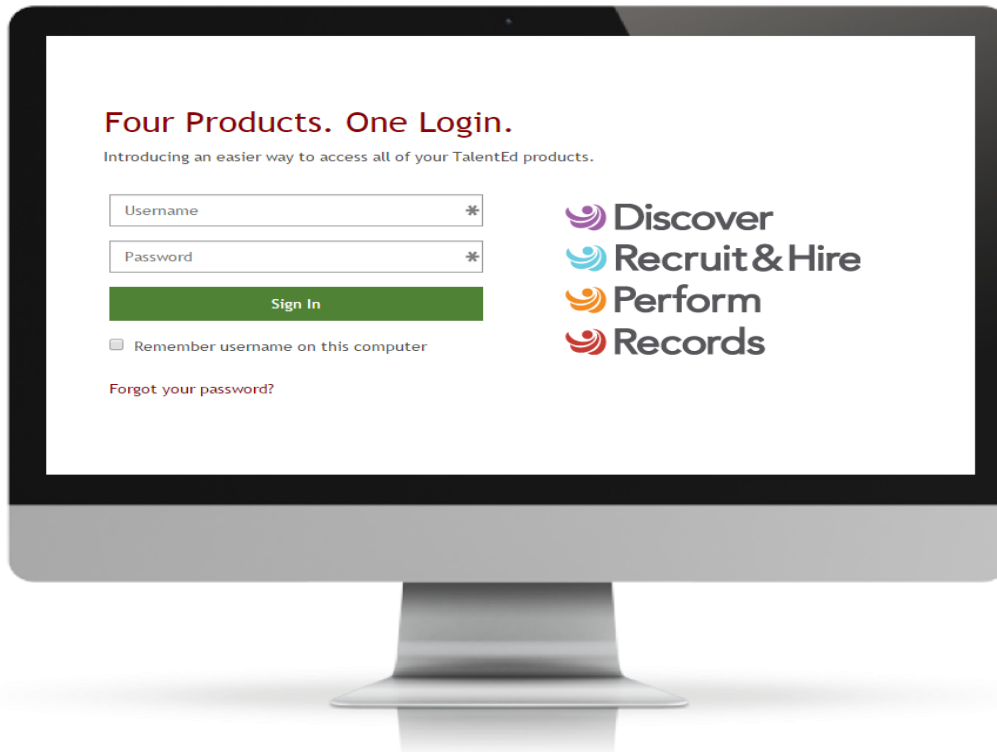
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## System Overview

To begin Using Records, first log in using the credentials provided to you by your organization.

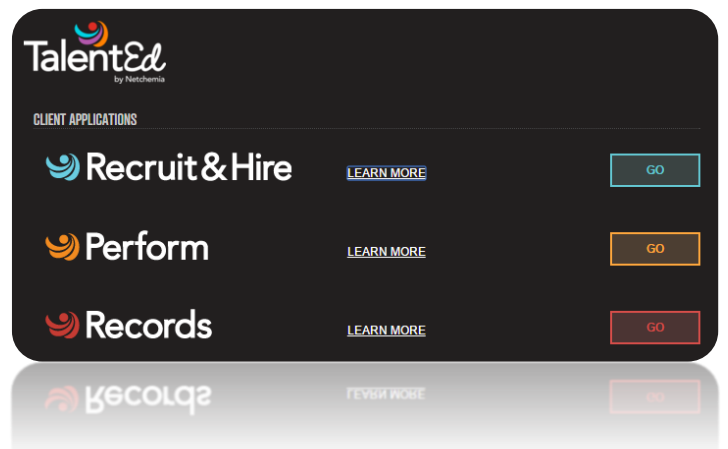
If you have trouble logging in, you can click on the 'Forgot your password?' link to have an email sent to you to have your password reset.



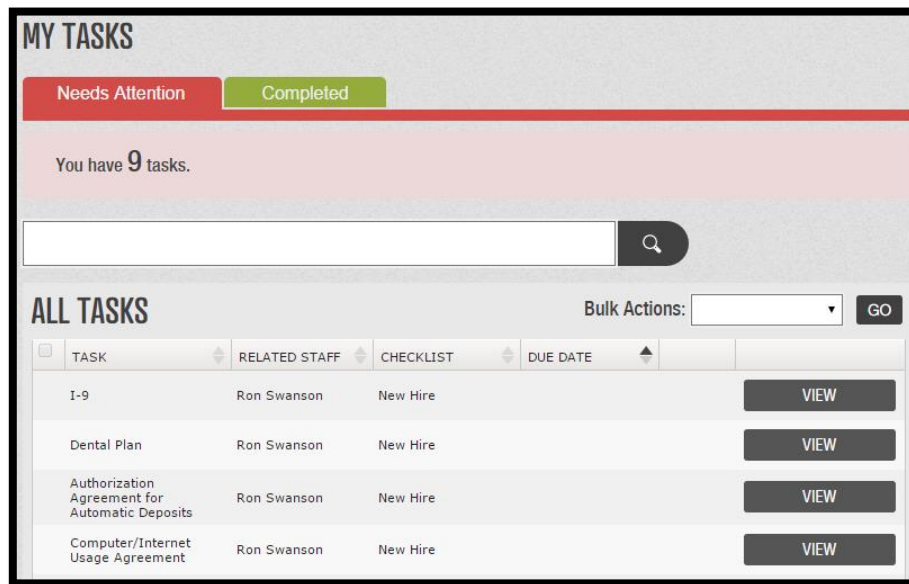
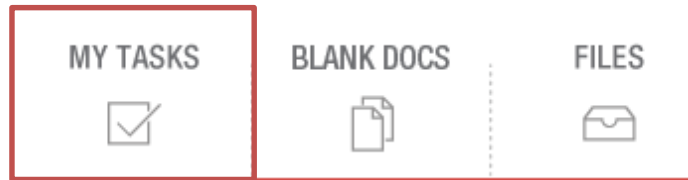
If you have access to more than one TalentEd solution, click the



icon in the upper right corner of your screen. From here you can navigate to any TalentEd solution you have.



## My Tasks



When you first log into Records, you will be taken to the **My Tasks** page. This is where you can view and complete any outstanding tasks you have been assigned. The **My Tasks** screen is where you can view all tasks you have been assigned through Records. You'll notice there are two tabs on this screen.

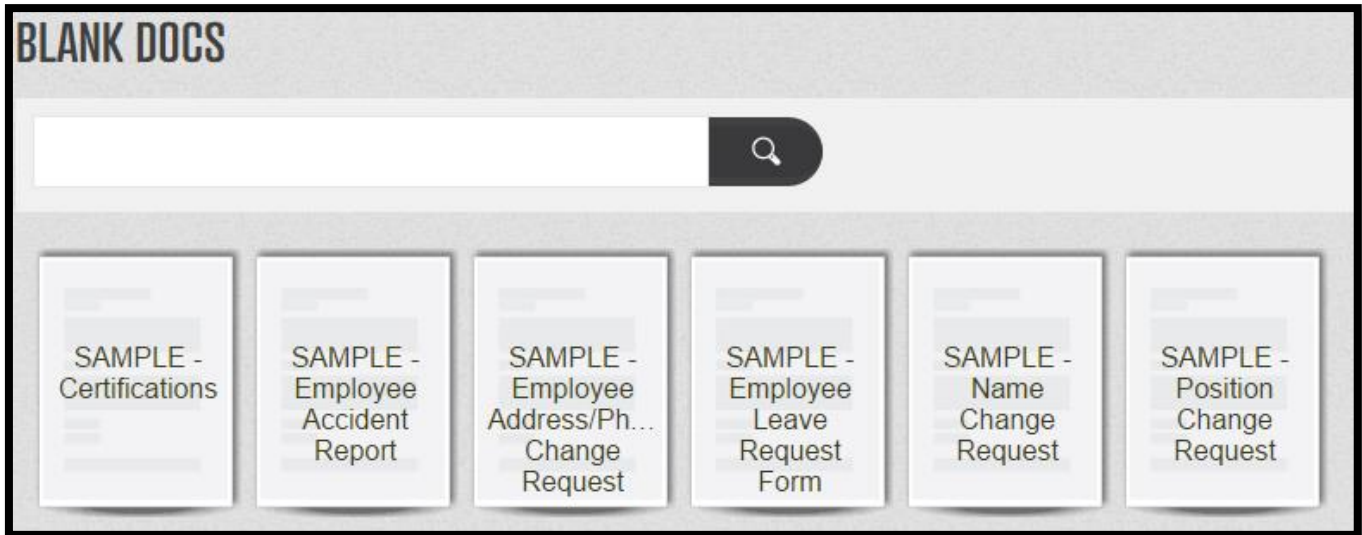
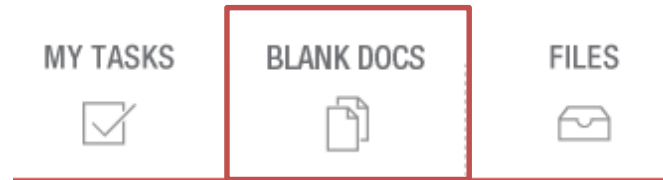
The **Needs Attention** tab will indicate which tasks still require action on your part. To take action, click **View** to open the form. You may be asked to fill out a new form or Sign or Approve a form that has been submitted to you.

Some tasks are not associated with a form at all. These tasks will include a **Mark as Done** button next to them. When you have completed the appropriate tasks simply click Mark as Done to remove it from your Needs Attention list.

This page also includes a **Completed** tab for your reference. Keep in mind that tasks may not show up on your Completed tab immediately if they require a review or signature by other staff in your organization.

Use the search field to quickly locate a task in your task list.

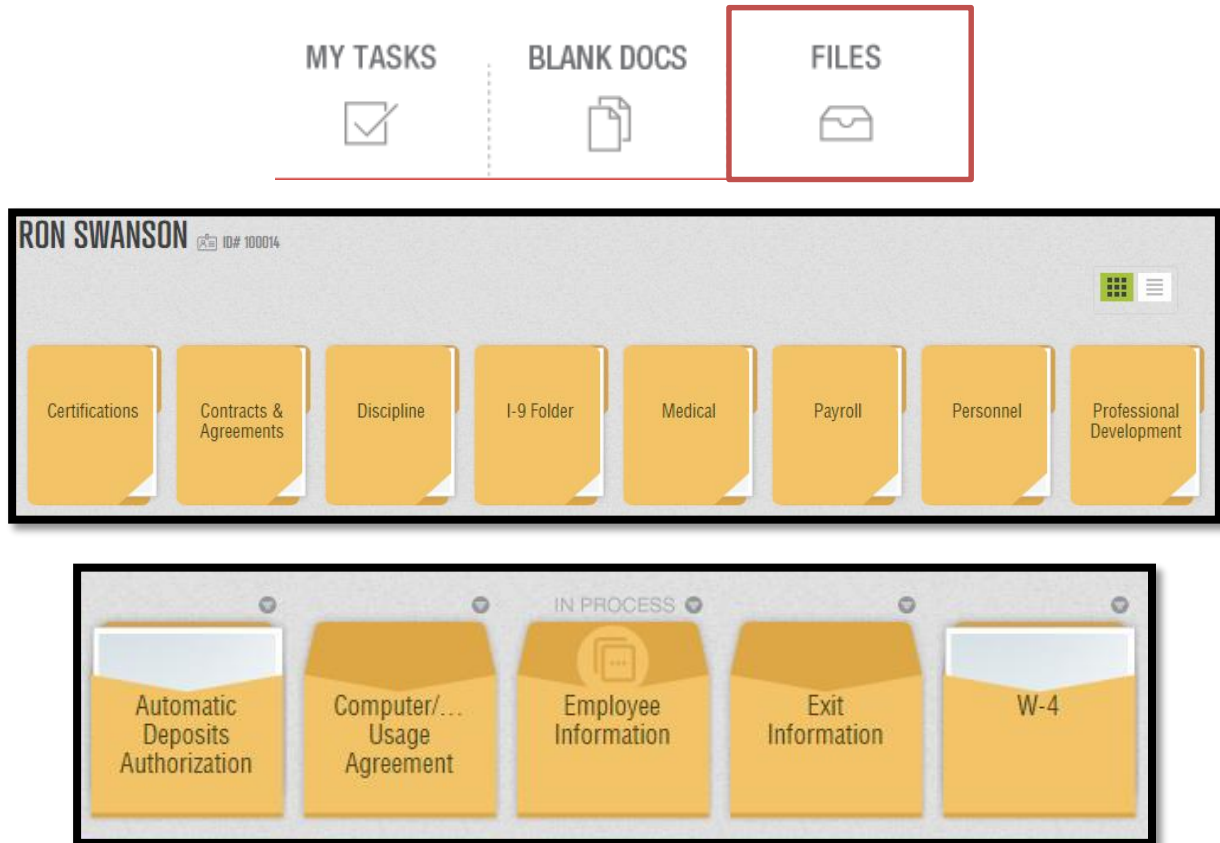
## Blank Docs



Certain Documents are available to be completed at any time. These are referred to as **Blank Docs** or **Blank Forms**. These Documents typically include Change Management forms (for example, you wish to change your name, address, phone number, or direct deposit information) while other Blank Docs may refer to Reports and Requests your organization has made available to you.

To complete a Blank Doc, simply open the document you wish to submit, enter the data requested, and Save Final. Your document will automatically route to the appropriate department within your organization for processing.

## Files



Documents in Records are sorted into **Folders** based on the type of document. The first image shows a sample Folder structure you might see when you click on the Files button. This allows Payroll documents to be grouped together, Personnel documents to be grouped together, so on and so forth. Users will see different Folders based on the access they need.

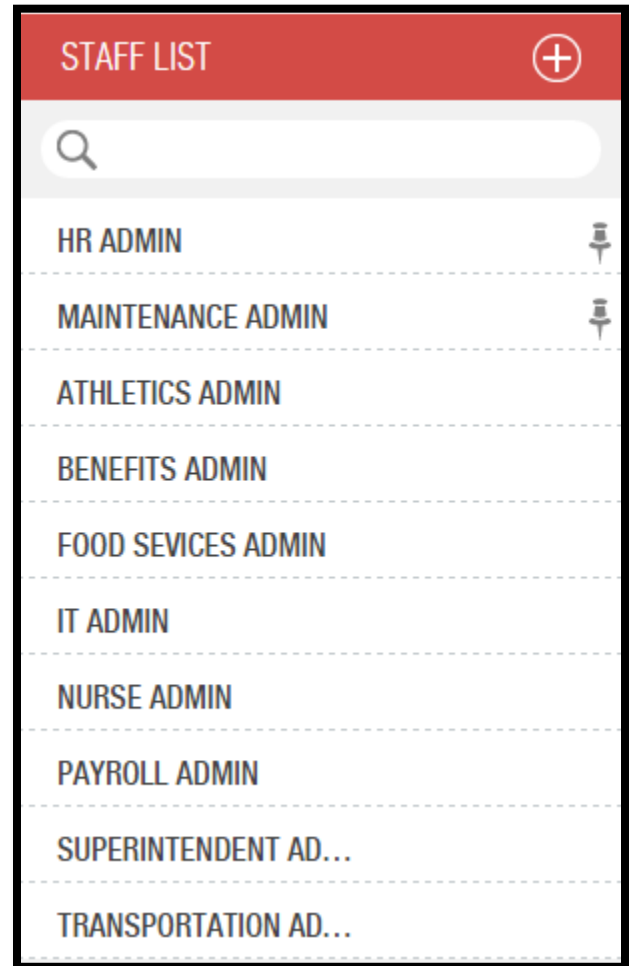
Once allocated to a folder you can see how each Document is sorted into its unique individual **Sleeve**. The second image shows what a sample Payroll Folder might include.

- If a Document has been completed you will see a piece of paper active in the Sleeve, Automatic Deposits Authorization and W-4 in the example above.
- If a Document is currently being worked on you will see **In Process** above the Sleeve as indicated by Employee Information above.
- If a Document has not been started the Sleeve will be blank. It is completely normal to have blank Sleeves in a Folder.

## Supervisor Tools

As a **Supervisor** you will have access to view Staff who report directly to you. Your view of Records will include a **Staff List** on the left side of the screen. You can use the **Search** field to quickly find a particular staff member in the Staff List. Click on a staff member to open up their files (you may see fewer files than you see for yourself based on the security settings defined by your system owner). You will also be able to track the progress your staff are making on any assigned **Checklists**. To move a staff member to the top of your Staff List, toggle the pin icon on the right side of the staff name. This will pin them to the top of your Staff List until you click the pin again to unpin them. [RIGHT]

As a Supervisor you may also submit Blank Forms on behalf of staff who report to you. When you open a Blank Form you will be asked who you would like to submit the form for. Documents you submit for yourself will be placed in your own personal files while documents submitted for another staff member will be saved to their own files. [BELOW]



### ADD DOCUMENT

Add a document for myself  
 Add a document for another staff member

How would you like to add this document?

**ADD AS AN E-FORM** **CLOSE**