

WebCenter Admin - How to Add Documents to Portals

Last Modified on 10/29/2020 10:31 am CDT

Within the WebCenter customer and employee portals, documents can be shared. These documents are not interactive like HRCenter, but instead allow you to share files and documents with the employee or contact that can be accessed at any time.

For example, perhaps you always want your employees to have electronic access to their employee handbook or you would like customers to have access to documents that discuss the benefits employee's receive by being employed through you.

Like all things in WebCenter, document accessibility can be configured to give *everyone* access, or, just *one person* access! We'll take a look at how we add documents and define accessibility in the steps below.

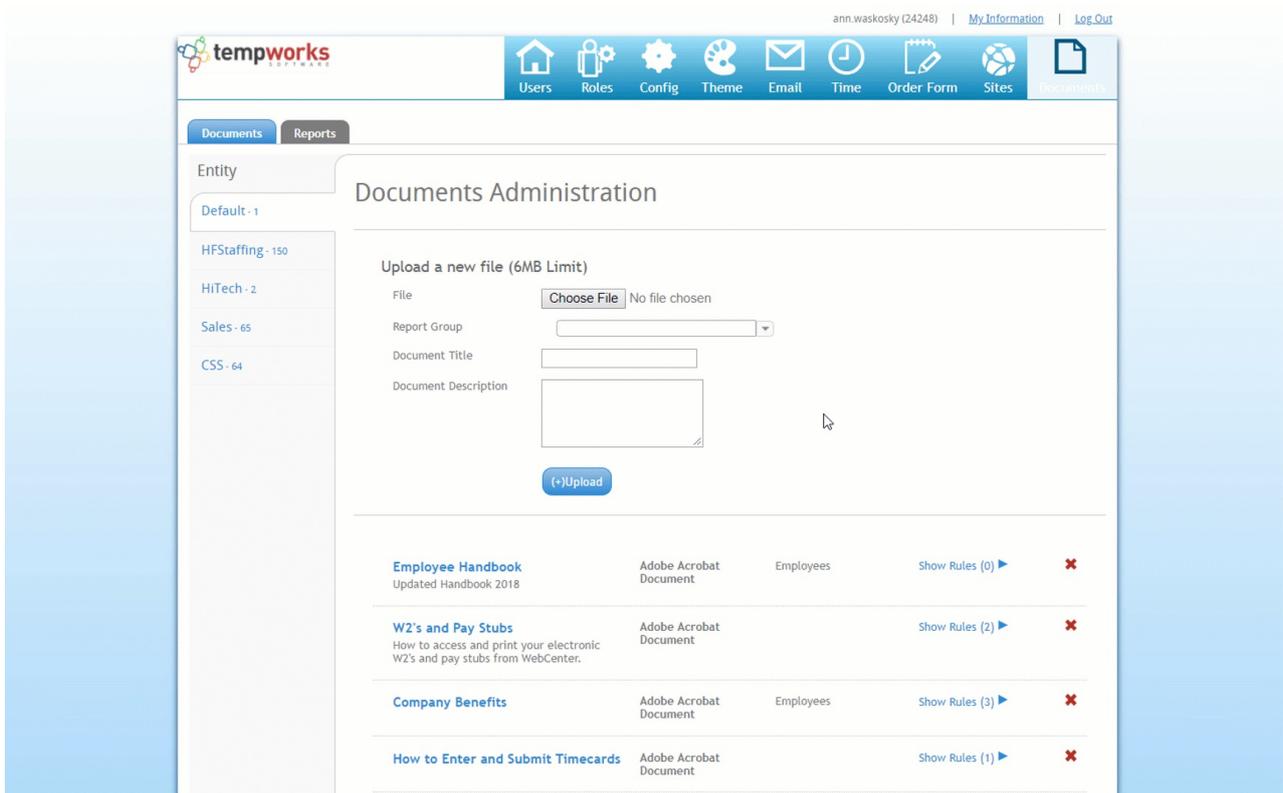
Adding a Document in WebCenter

Begin by logging in to WebCenter Admin. In the options menu across the top, select *documents*:



Once there, select 'Choose File.' This will open the file explorer on your local machine, allowing you to select the file you would like to upload:

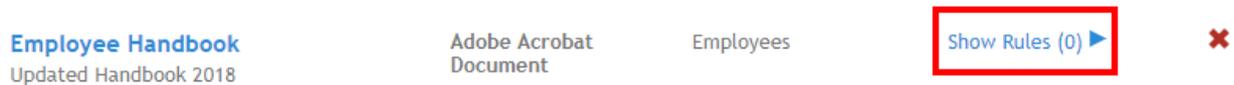
With the file now selected, enter a document title, document description, and select 'Upload':



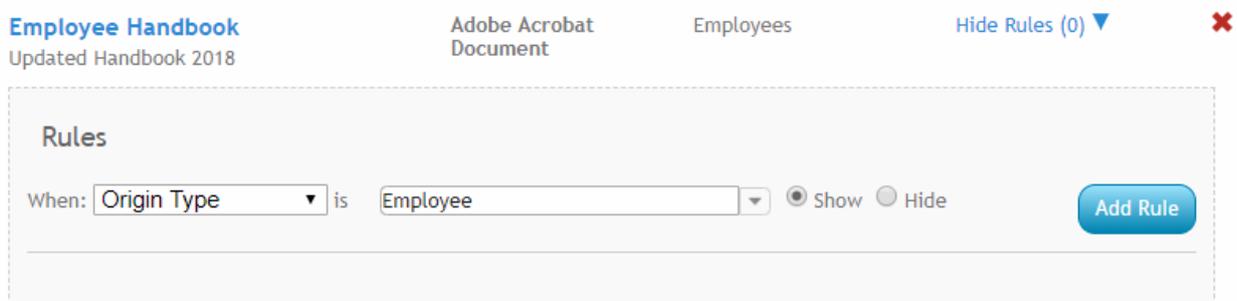
Configuring Document Rules

After the document successfully uploads, the next step is to define who should be able to access the document. We do this by configuring rules.

Begin by selecting *show rules*:



In this example, we have said that when the **Origin Type** (i.e. record type) is **Employee**, show the document:



Note The rule we created is just one of many possible combinations, and that one document can have multiple rules. For example, we could also say that when the branch name is Memphis NE hide the document. So, even though we selected to show the document to employees, if an employee is tied to the Memphis NE branch, they will not see the document:

Rules

When: **Branch Name** is **Memphis NE** Show Hide [Add Rule](#)

Documents Displayed in WebCenter

To bring this full circle, let's take a peek at what employee sees when accessing their portal.

From the documents tab, the Employee Handbook displays for download:

The screenshot shows the WebCenter 6 interface. The top navigation bar includes icons for Home, Assignments, Calendar, Timecards, Pay History, Documents (selected), JobBoard, and HR Center. Below the navigation bar is a search bar with a dropdown menu set to 'All' and a search icon. The main content area displays a list of documents:

| Document Name | Last Updated | Category |
|--------------------------|--------------|-----------|
| Company Benefits | 7/12/2017 | Employees |
| Direct Deposit Form | 4/22/2014 | DD Form |
| Employee Handbook | 12/20/2018 | Employees |

The 'Employee Handbook' row is highlighted with a red border. Each document entry includes a 'Download' icon and text.

Related Articles