

Main Self Service Dashboard

Upon logging in with your NEOGOV account, you will see your Dashboard. This is a single central hub for you to manage tasks, see your direct reports, and update your personal details.

Your Dashboard is made up of widgets that organize information and actions for your staff. These widgets allow you to take action right from this page, and include important metrics, filters and key information so you can focus on the highest priority tasks.

Manager's View of Onboard

Managers have access to menu options that will help them keep track of and interact with the employee profiles of their hierarchy.


Employees

Pre-Hires

Reports

Completed Forms

Downloads



Stella Sanguinea

HUMAN RESOURCES DIRECTOR


My Dashboard

Employee

Onboarding

Manager



Direct Reports



My Tasks

Current

Search

Subject	Due Date	Related To	Actions
Contact IT to start setting up workstation	10/06/2021	Ginko Kim	
Send email to employee with final hire details	10/08/2021	Ginko Kim	

1 - 2 of 2 items

Onboard Progress Report

VIEW ALL

Search

Employee #	Full Name	Position	Department Code	Department Name	Checklist Completion
002	Coffee Arabica	Deputy Human Resou...	HR	Human Resources	91% <div><div></div></div>
020	Stephen Cactus	Human Resources As...	HR	Human Resources	0% <div><div></div></div>

1 - 2 of 2 items

FEEDBACK & HELP

The **My Dashboard** page serves as a manager's landing page in Onboard.

Employees

Pre-Hires

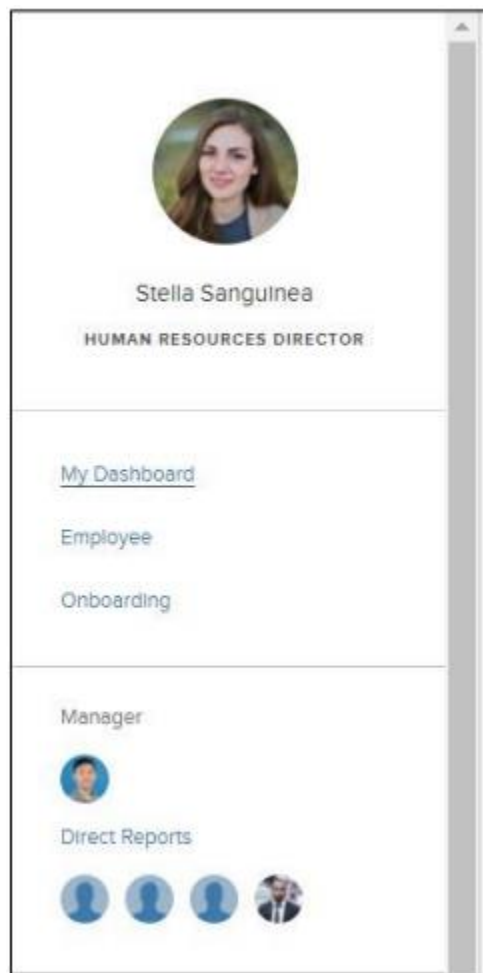
Reports

Completed Forms

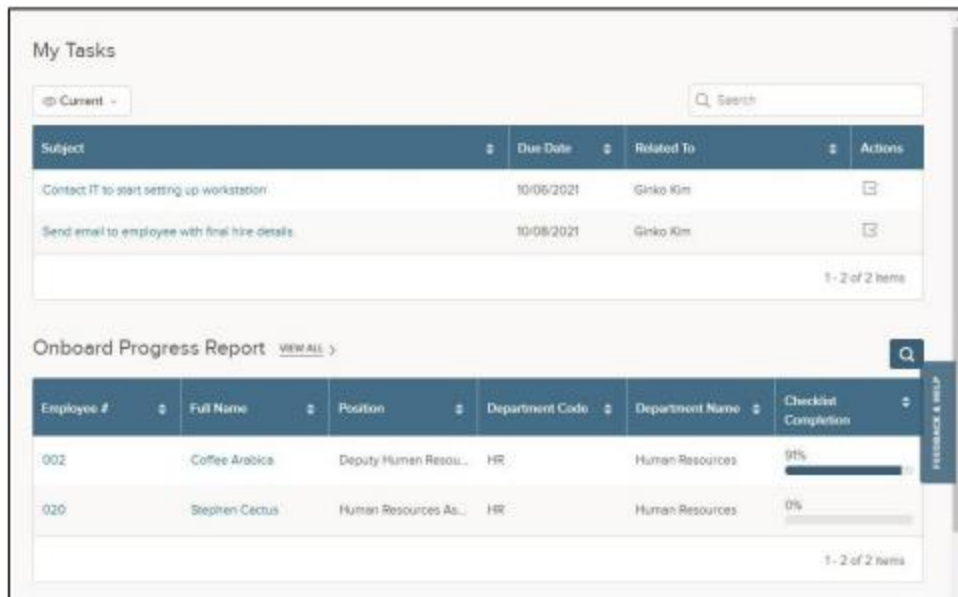
Downloads

The navigation bar allows you to access various pages within Onboard. From left to right, you can view the following:

- The Employee List displays a list of employees who are within your scope
- The Pre-Hires List displays a list of pre-hires who are within your scope
- Select Reports to run reports on the employees who are within your scope. The available reports are: Onboard Progress, Offboard Progress, Preboard Progress, Checklist Progress, and Task Status.
- Select Completed Forms to run reports on completed forms for employees who are within your scope
- Downloads takes you to your downloads list. From here, you can download completed form export jobs.



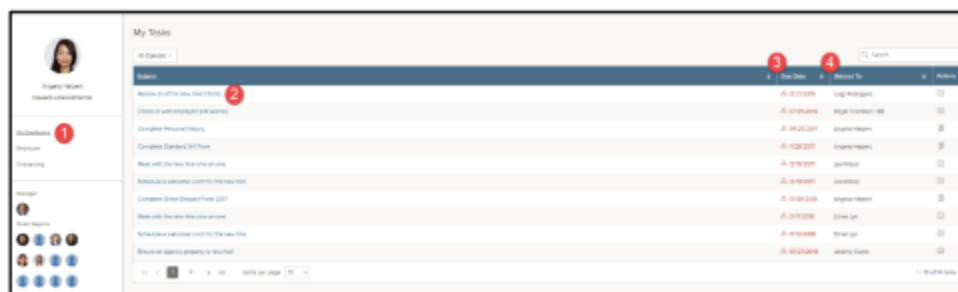
From the **side menu**, you can access your dashboard, your employee details page, and your own onboarding portal. You can also view your manager and your direct reports. Please note that while you can view the employee profiles of your direct reports and hierarchy, you will not be able to view the employee profile of your direct manager.



- The **My Tasks** section of the dashboard shows you all your current tasks. You may also filter for completed, canceled, pending or skipped tasks.
- The **Onboard Progress Report** generates the onboarding percentage completion status for each employee who has checklists assigned. HR determines your role in the Onboard process. Select view all to view the full Onboard Progress Report.

Complete Checklist Tasks as a Checklist Contributor

Managers or staff who help to facilitate the onboard process may be required to complete tasks for direct reports or other employees being onboarded. It is best practice for these individuals acting as additional checklist contributors to complete their tasks from their **My Dashboard** page.



1. **My Dashboard:** Additional checklist contributors complete their current Tasks here
2. **Current Tasks:** Click on the task title to complete the Task
3. **Due Date:** The due date of the Task
4. **Related To:** Which new hire the Task is related to

Manager Access to Employee Forms

Managers and other staff who help to facilitate the onboard process (e.g. IT, payroll) may have access to the profiles of other employees in the system. HR configures which forms these users have access to.

Reports

To run a report for employees that are within your hierarchy, select the Reports menu option and then select the desired report.

The screenshot shows the 'Onboard Progress Report' interface. At the top, the report title is labeled with a red circle 1. Below it, a form area is outlined with a red box and labeled with a red circle 2. This form contains three sections of radio buttons: 'Department' with options 'Active' (selected), 'All', and 'Specific'; 'Start Date' with options 'All' (selected) and 'Specific Date Range'; and 'Employees' with options 'Employees Only', 'Authorized Pre-Hires', and 'All' (selected). A small grey box below these options says '*Fields are required.' To the right of the form is a 'Generate Report' button labeled with a red circle 3. Below the form is a 'Bulk Actions' button labeled with a red circle 4. To the right of the 'Generate Report' button are three icons: a column icon labeled with a red circle 5, a filter icon labeled with a red circle 6, and a magnifying glass icon labeled with a red circle 7. Below these is a table with columns: 'Employee #', 'Employee Name', 'Position', 'Department Code', 'Department Name', and 'Checklist Completion'. The table contains three rows of data. The first row shows Nancy Im, Finance Director, FA, Finance and Accounting, and 100% completion. The second row shows Emma Stone, Payroll Clerk, FA, Finance and Accounting, and 0% completion. The third row shows Sally Smith, Payroll Clerk, FA, Finance and Accounting, and 45% completion. At the bottom right of the table, it says '1 - 3 of 3 items'. The footer of the page includes the 'NEOGOV' logo and copyright information: '©2000 - 2019 NEOGOV. ALL RIGHTS RESERVED. TERMS | PRIVACY'.

Employee #	Employee Name	Position	Department Code	Department Name	Checklist Completion
11112	Nancy Im	Finance Director	FA	Finance and Accounting ...	100%
90210	Emma Stone	Payroll Clerk	FA	Finance and Accounting ...	0%
	Sally Smith	Payroll Clerk	FA	Finance and Accounting ...	45%

1. The name of the report is listed here

2. Set your parameters

3. Click **generate report** when ready

4. Select **bulk actions** to export the list information into pdf, excel, or csv format. If you wish to export

the list data, please first toggle the records you would like to export.

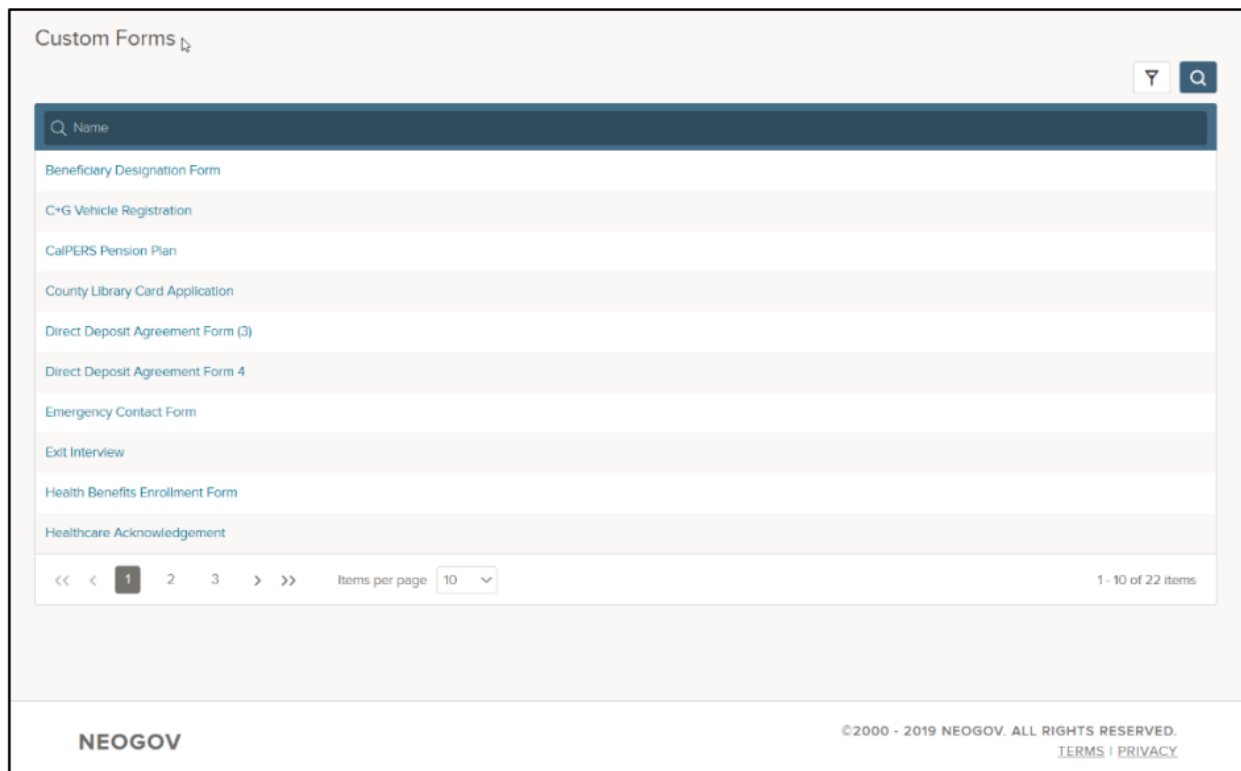
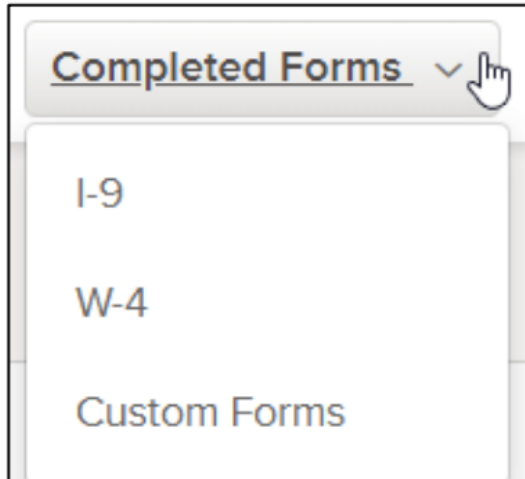
5. Use the **column** icon to edit the columns in the list view

6. Use the **filter** icon to filter the data displayed in the list view

7. Use the **magnifying glass** to close the column headers to search. This will then allow you to sort the data displayed in the list view by clicking on a column header.

Completed Forms

The completed forms reports allow you to generate reports on forms completed by employees within your hierarchy.



Please keep in mind that HR determines access to forms and form data. You may not be able to generate a completed form report if HR did not give you permission to access to that form (e.g. managers might not be given access to direct deposit forms, I-9s, W-4s, etc.). Please contact your HR team if you have questions regarding forms for employees within your hierarchy.

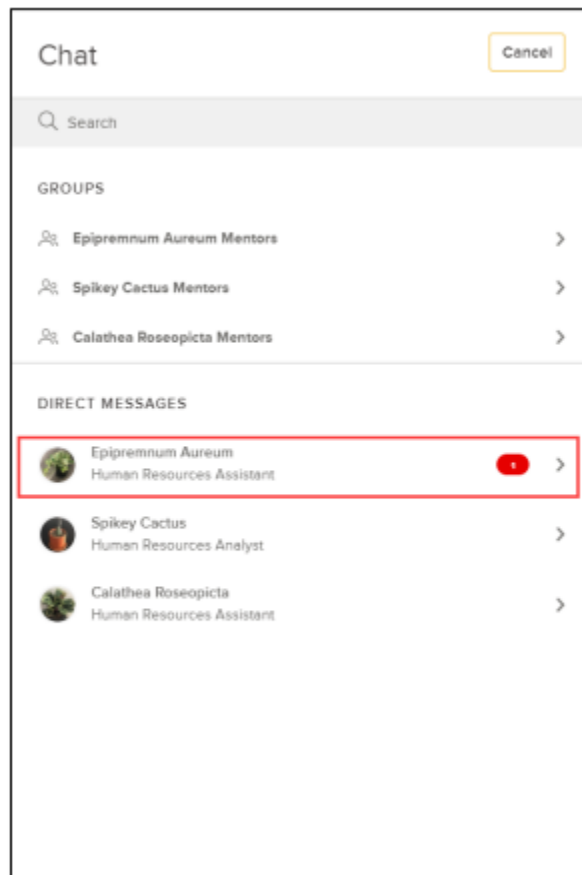
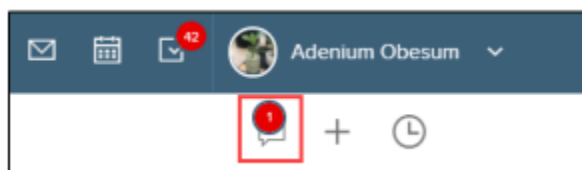
Mentors Widget

The Mentors Widget allows your agency to connect new hires to their direct managers and other experienced employees within the agency. HR determines the mentor-mentee relationships. Please note - this widget is only available on the Home Onboarding Portal.

Mentor Chat View

When a mentor receives a chat from a mentee, they receive an email notifying them a conversation has started with their Mentee. Either log in to Onboard to view the chat or click the link from the email to be directed to Onboard.

Mentors can use the Chat icon in the Navigation menu to view and respond to messages. In the view below, we are logged in as a mentor.



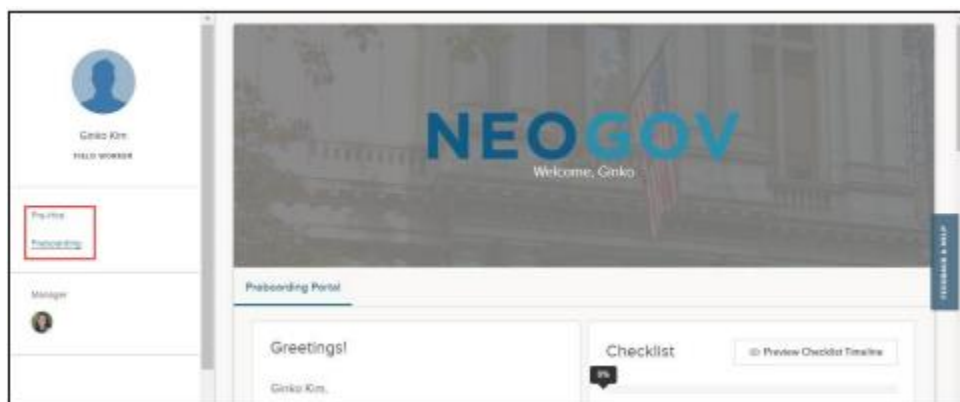
Preboarding and Pre-Hires

Preboarding is used to assign tasks and share relevant information with potential employees prior to when they have been hired. This allows agencies to add those Pre-Hires into the system without an employee number, agency email, exact start date, or position.

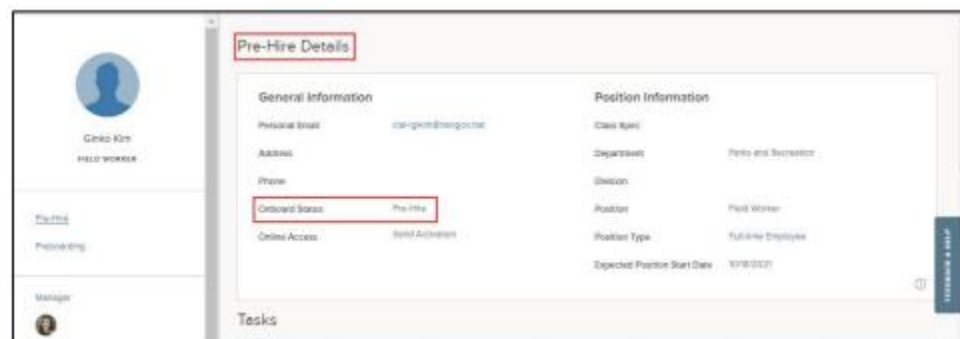
An agency's preboarding experience may differ greatly from its onboarding experience. Please keep in mind that if you are a pre-hire, you may not have access to the same tasks, forms, and checklists as an employee. However, the way you access your portal, complete checklists, and manage your forms will be the same.

Pre-hire Statuses

Pre-hires can be in one of two statuses: **pre-hire** or **authorized pre-hire**. When a Pre-Hire completes their Preboard checklist(s) and is ready to begin on the Onboard checklist(s), an agency may decide to authorize a pre-hire. Authorizing a Pre-Hire occurs before the Pre-Hire is assigned an Employee Identification Number and work email address. This also allows Pre-Hires to complete Onboard tasks that are not contingent on pre-hiring tasks.



Pre-hires have access to the **pre-hire** and **preboarding** options on the left-hand sidebar.



Notice that the employee details label has been replaced with the **pre-hire details** label. The status field also indicates that a pre-hire is in the **pre-hire status**.



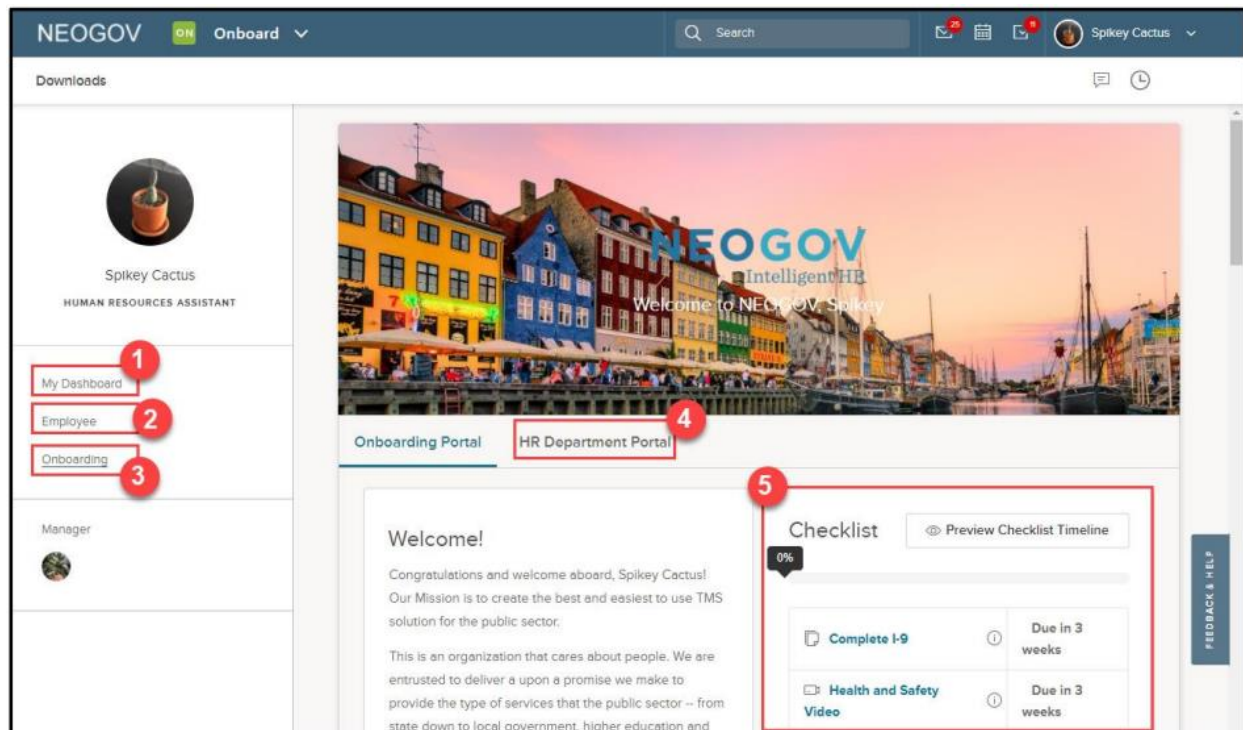
Authorized Pre-Hires have access to the **pre-hire** and **onboarding** options on the left-hand sidebar.



Notice that the employee details label has been replaced with the **pre-hire details** label. The status field also indicates that a pre-hire is in the **authorized pre-hire status**. Authorized pre-hires no longer have access to the preboarding portal and instead have access to onboarding portals. Authorized pre-hires may complete any Onboarding checklists assigned to them as well as any incomplete preboarding checklists.

Employee's View of Onboard

When the new hire logs into Onboard, they land on the Onboarding Portal. From here they can complete tasks, browse through all the helpful information on their portal(s), and access their Dashboard and their Employee Details page.



1. My Dashboard: Displays all current tasks the employee needs to complete by default
 - a. They can also view any Completed, Canceled, Pending, or Skipped tasks
2. Employee: Displays all employee information, tasks, notes and attachments, and forms
 - a. Employees can attach any documents or notes, as well as view any attachments other users have added to their page
 - b. Any completed form is available to print
3. Onboarding: Returns the employee to their Onboard Portal
4. Sub-portal: Sub-portals may be available to employees depending on what position, class spec, division, or department they occupy
5. Checklist Widget: Where all To-Do tasks are listed.

Widgets

Checklist Widget

The **checklist widget** is stored on the home portal. All checklists, no matter how they are assigned

to an Employee, display on the home portal.

The screenshot shows a 'Checklist' widget. At the top left, the word 'Checklist' is displayed. To its right is a progress bar showing '44%' completion. A red circle with the number '1' points to the progress bar. To the right of the progress bar is a button labeled 'Preview Checklist Timeline' with a red circle and the number '3' pointing to it. Below the progress bar is a table of tasks. A red circle with the number '2' points to the first task, 'Complete Emergency Contact Form'. The table lists several tasks with their completion status and due dates. A red circle with the number '4' points to the 'VIEW ALL (9)' link at the bottom right of the table.

Task	Status	Due Date
Complete Emergency Contact Form	<input type="checkbox"/>	Due in 3 weeks
Complete Information Systems Acceptable Use Form	<input type="checkbox"/>	Due in 3 weeks
Complete Parking Form	<input type="checkbox"/>	Due in 3 weeks
Voluntary Self-Identification of Disability	<input type="checkbox"/>	Due in 3 weeks
Complete W-4	<input type="checkbox"/>	Due in 1 month
Watch Video - Discover Pinto County	<input checked="" type="checkbox"/> Completed	
Watch Video - Internet Safety in the Workplace	<input checked="" type="checkbox"/> Completed	
Watch Video - Sexual Harassment Policy	<input checked="" type="checkbox"/> Completed	
Complete I-9	<input checked="" type="checkbox"/> Completed	

1. The completion progress bar updates as pre-hires or employees complete their assigned task
2. Click on tasks to complete them
3. Click on the preview checklist timeline button to display each task's due date relative to the employee's start date
4. Click view all to view all assigned checklists and tasks

Text Widget

Text widgets are used to display helpful text such as a welcome message, onboarding tips, or next steps after being onboarded.

The screenshot shows a text widget with the title 'How to Use This Site'. The text inside the widget reads: 'This portal is designed to provide you with all the information, forms, and policies you will need as a new employee. Complete your onboarding tasks via the checklist widget above. As you click and complete your checklist items, the'.

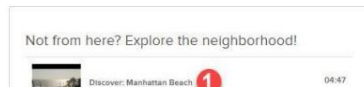
Picture Widget

Picture widgets act as photo galleries and can include photos of staff, buildings, maps, and more.



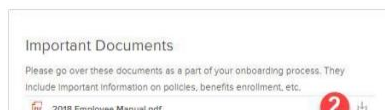
Video Widget

Video widgets are used to highlight important agency videos.



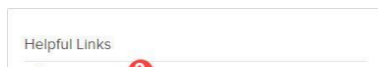
Document Widget

Document widgets may include important documents that employees should read as reference (e.g. policies, handbooks, manuals, etc.) Click on the download icon to download the document.



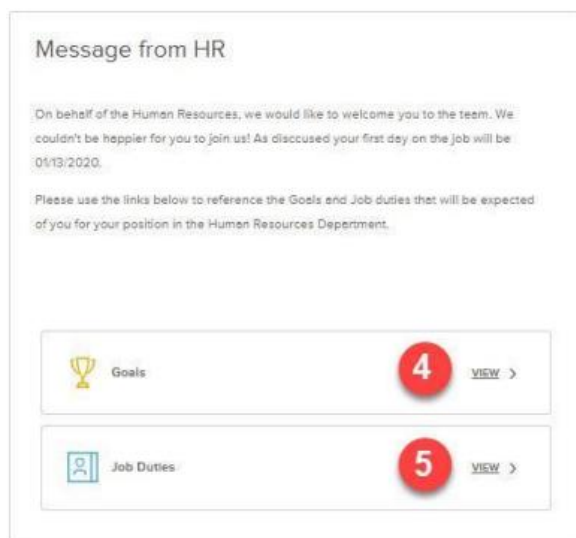
Link Widget

Link widgets allow your agency to provide helpful and important links to external sites, downloads, intranet pages, and more. Click on the link to be redirected to the external site.



Job Clarity Widget

The Job Clarity Widget is a great tool that agencies can use to set expectations for new hires. Employee goals may be visible in the Job Clarity Widget if your agency has NEOGOV Perform. Information from the employee's class spec (i.e. job description) or job posting may be visible in this widget.

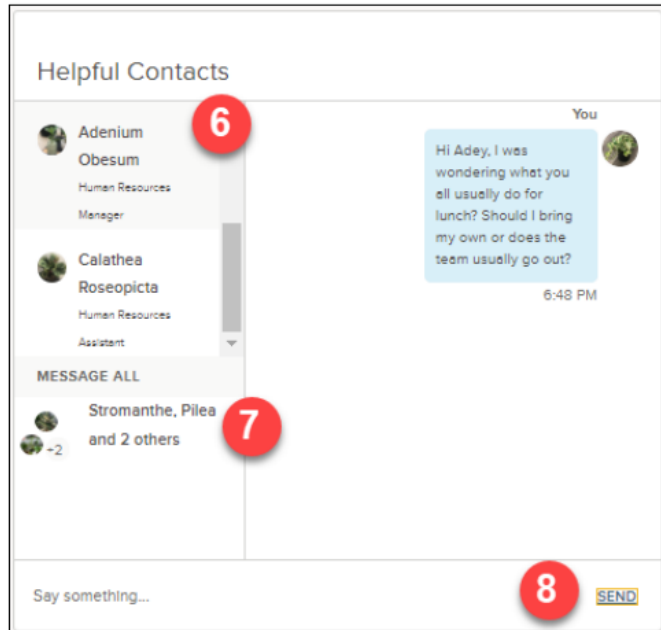


Mentors Widget

The Mentors Widget allows your agency to connect new hires to their direct managers and other experienced employees within the agency. HR determines the mentor-mentee relationships. Please note - this widget is only available on the Home Onboarding Portal.

Mentee Chat View

If an employee is a mentee, they use the Mentors widget from the main Onboarding portal. In the view below, we are logged in as a mentee.



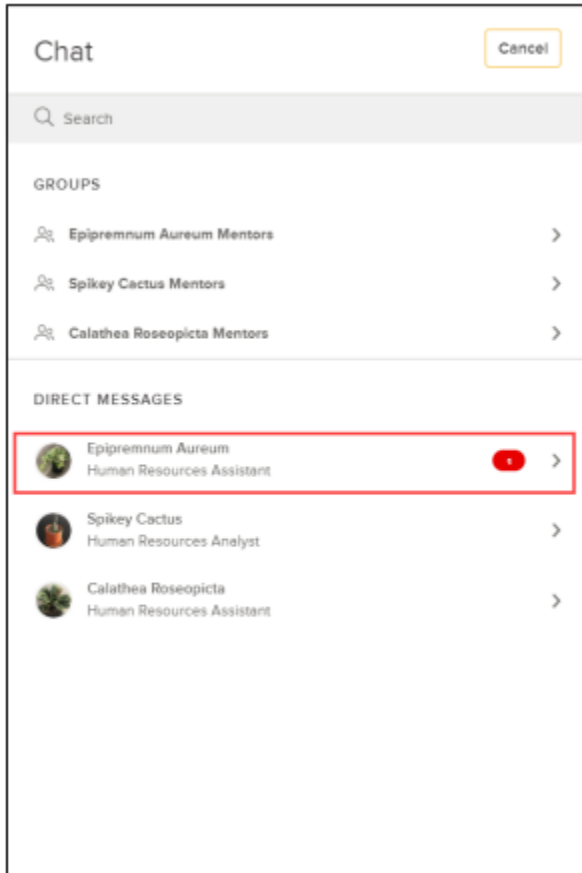
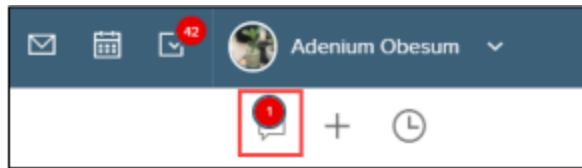
(Mentee Chat View)

6. Mentor names are listed for one-on-one conversations
7. Mentor names are together for group conversations
8. Type something in the **Say Something** text box and click **Send** or push enter on your keyboard to deliver your message to a mentor

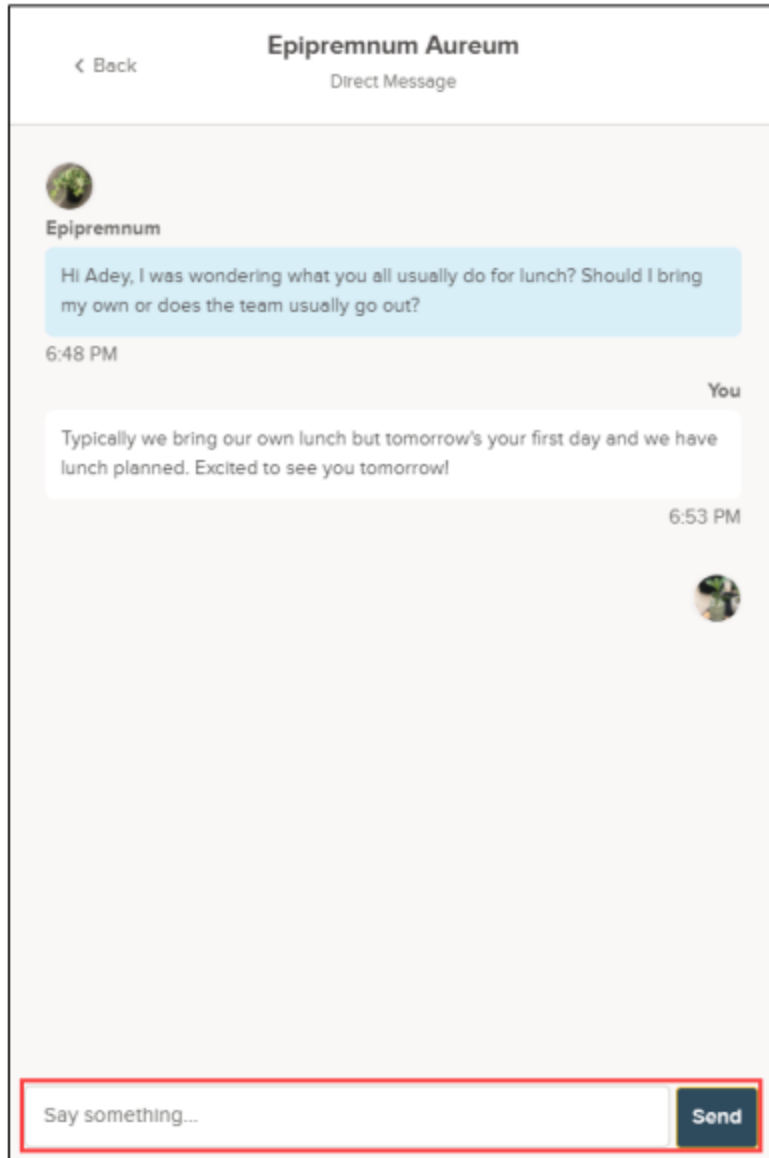
Mentor Chat View

When a mentor receives a chat from a mentee, they receive an email notifying them a conversation has started with their Mentee. Either log in to Onboard to view the chat or click the link from the email to be directed to Onboard.

Mentors can use the Chat icon in the Navigation menu to view and respond to messages. In the screenshots below, we see the mentor's view.



Locate the unread message and select the name of the mentee to open their chat window.



Complete Checklist Items as a New Hire

It is best practice for the employee (i.e. new hire) to complete Onboarding Tasks from their main **Onboard Portal** via the **Checklist Widget**. All possible task types are listed below.

Manual Task

Update Task [Cancel] [Save]

1 Download and Read Employee Handbook

2 Please make sure to download and read the employee handbook in it's entirety by the time we have our 1 week check in. Many of our most important policies (e.g. sexual harassment prevention, IT usage, ethics) are included in this handbook

*Fields are required.

3 Update status from Current to: *
Completed

4 File Attachment:
NEOGOV Employee Handbook.pdf [Download Icon]

5 You must download the attachment before completing this task.

ACCESSIBILITY TOOLS

Comment:
[Text Area]

1. The **subject** of the task is indicated in large font at the top
2. Be sure to read the **description** if provided. The description supplements the subject.
3. The **status dropdown** allows you to update the task's status
4. Select the **download icon** to download the included attachment
5. Click **save** to complete the task. Note – if an attachment is included, you must download the attachment before completing the task. Click **cancel** to exit the window.

Links

Update Task [Cancel] [Save]

Create Anthem Account for Benefits Enrollment

Use the link provided to sign up for an anthem account. Our group ID is ABC123.

[Anthem Portal Link]

*Fields are required.

Update status from Current to: *
Completed

Comment:
[Text Area]

Sometimes, links may be provided with manual tasks. Clicking on a link will direct you to a site outside of NEOGOV Onboard. Complete the task as you would any other manual task.

Video Task

Video tasks pull videos from YouTube or Vimeo. Notice that to complete a video task, you must finish watching the provided video

Form Task

Form tasks allow you to complete forms electronically. Required fields (i.e. questions) will be marked in red. Form actions will remain at the top of the page as you complete the fields:

- Select **Cancel** to return to the previous screen

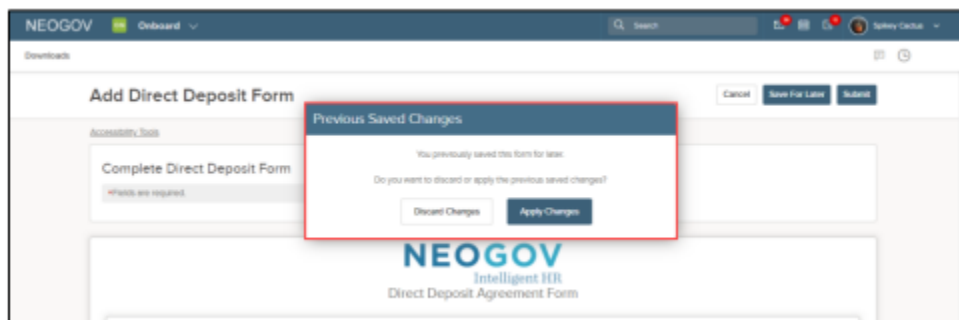
- Select **Save for Later** to save the form while in progress. If a form is saved for later, you will be able to return to the form later to complete and submit. Fields marked as required do not need to be completed to save the form for later. Selecting **Save for Later** does not complete the form task.

- Select **Submit** to complete the form

Keep in mind that when forms are complete, they are **locked**. To make updates to a completed form, contact your HR administrator and ask for the relevant forms to be **unlocked**.

Resume Completing a Form

Selecting the **Save for Later** option when completing a form task creates a temporary save of the form. This form task can be resumed later via the checklist widget on the portal.



Select **Discard Changes** if you would like to start fresh with a blank form. Select **Apply Changes** to have your previously saved changes restored.

Attachment Task

A screenshot of the 'Update Task' form in the NEOGOV portal. The form has a title bar 'Update Task' with 'Cancel' and 'Save' buttons. The main section is titled 'Upload Picture for ID'. Below the title is a red error message '+Fields are required.'. There is a dropdown menu labeled 'Update status from Current to:' with 'Completed' selected. Below this is a large rectangular area for file upload. It contains a circular icon with an upward arrow, the text 'Drag and drop files here, or click here to upload', a list of supported file types (pdf, doc, docx, xls,xlsx, ppt, pptx, txt, rtf, png, jpg, jpeg, gif), and a note 'The maximum allowed file size is 5MB.'. At the bottom of the form is a text input field labeled 'Comment'.

To complete an attachment task, you are required to upload at least one attachment. Drag and drop files into the upload area or click into the upload area to browse your local files for an attachment. The maximum file size allowed is 5MB.

Review Task

Review tasks require the task assignee to review the contents of a form. The task assignee views the form in read-only mode and cannot make changes to the contents of the form. When previewing a form as part of a Review task, signatures are displayed and files that were uploaded to the form may be downloaded as well. This task type is not commonly assigned to new hires but may be assigned to managers or other administrative staff.

Review Direct Deposit Form

Cancel Deny and Return Approve

Accessibility Tools

Review and Process Direct Deposit Form

*Fields are required.

NEOGOV
Intelligent HR
Direct Deposit Agreement Form

Employee*

Spiley Cactus

I hereby authorize NEOGOV to initiate automatic deposits to my account at the financial institution named below. I also authorize NEOGOV to make withdrawals from this account in the event that a credit entry is made in error.
Further, I agree not to hold NEOGOV responsible for any delay or loss of funds due to incorrect or incomplete information supplied by me or by my financial institution or due to an error on the part of my financial institution in depositing funds to my account.
This agreement will remain in effect until NEOGOV receives a written notice of cancellation from me or my financial institution, or until I submit a new direct deposit form to the Payroll Department.

Account Information

Name of Financial Institution	Account Number
Bank of America	123456789
Routing Number	Account Type
81910432	Checking

All actions are located at the top of the page. Choose to either a) **cancel** and exit the form, b) **deny and return** the form, or c) **approve** the form.

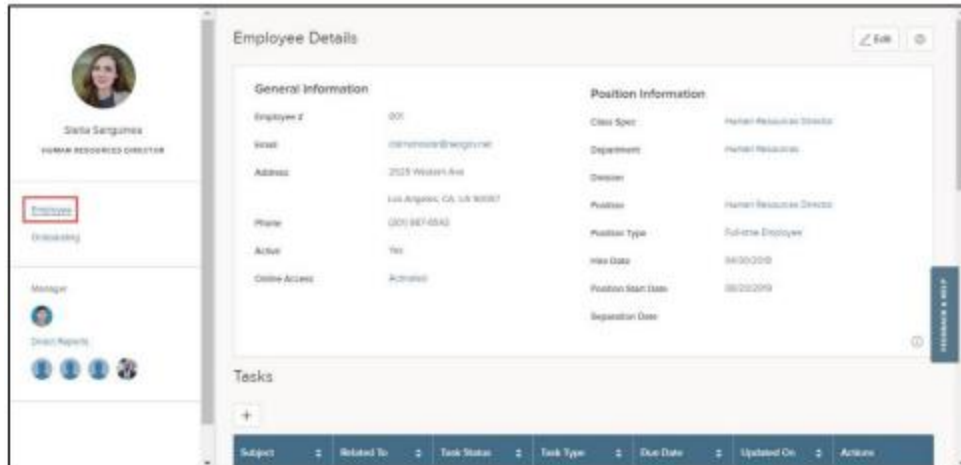
The screenshot displays the NEOGOV web application interface. The top navigation bar includes the NEOGOV logo and a user profile dropdown. The main content area is titled 'Review Direct Deposit Form' and contains a 'Review and Process Direct Deposit Form' button. Below this, there is a 'Comments' section with a text input field. The right-hand panel, titled 'Deny and Return', contains a 'Comments' section with a text input field and 'Cancel' and 'Deny' buttons. The form itself is titled 'NEOGOV Intelligent HR Direct Deposit Agreement Form' and includes sections for 'Employee' and 'Account Information'.

If you choose to **deny and return** the form, you will be required to include comments to explain the denial. A denied form is returned to the original form task assignee who will be able to review the comments and adjust accordingly

Employee Details

The **Employee Details** page displays all employee information, tasks, notes and attachments, and forms tied to the employee record. This page acts as an employee profile. Onboard users can access their own Employee Details page to view their own information.

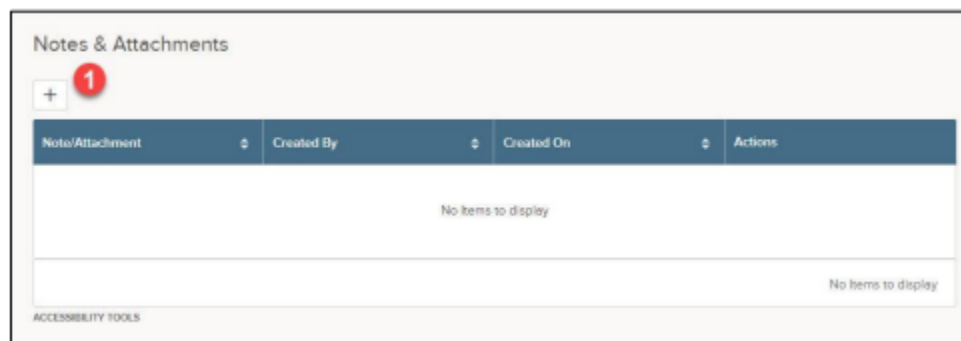
Managers and other staff who help facilitate the onboard process have access to the employee details pages of other employees in the system. Managers are restricted to the employee details pages of employees within their reporting hierarchy (e.g., their direct reports). IT and HR users may either be allowed to view all employees or be restricted to certain departments. These restrictions are called **scopes**.



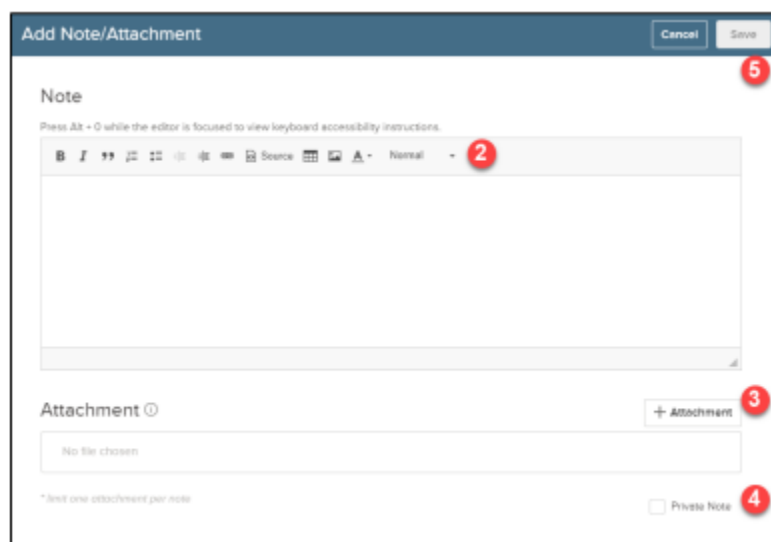
Select the **Employee** option on the left-hand sidebar to access the Employee Details page

Notes and Attachments

Scroll down to access the **Notes and Attachments** section of the employee details page



1. Click the '+' icon to add a note or attachment



2. Use the rich text editor to type a **Note**

3. Click + **Attachment** to add an attachment. Browse your local files and upload the desired file.
4. Click the **Private Note** toggle to ensure that only you and HR can see the note
5. Select **Save** to save the note and/or attachment to the employee profile

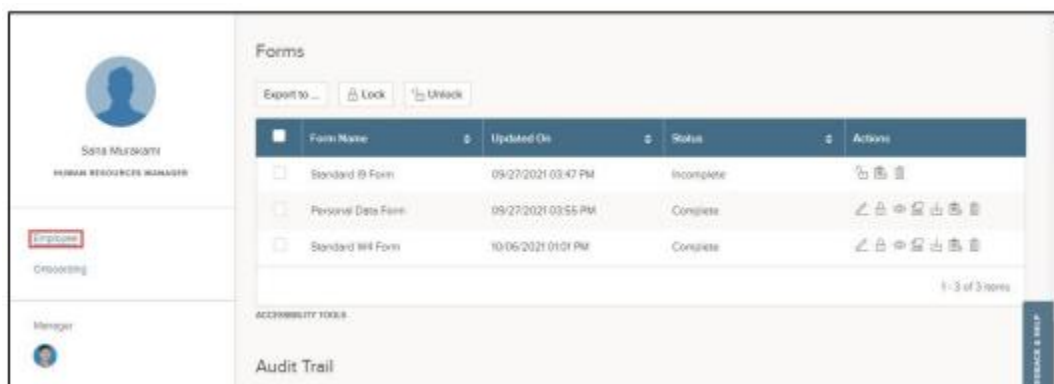


Select any of the icons under the actions column to take an action on an available note and/or attachment. Click the **pencil** icon to edit, the **trashcan** icon to delete, and the **paperclip** icon to download the note and/or attachment.

Documents uploaded via Attachment tasks may also be accessed via the Notes and Attachments section of the employee details page.

Managing Forms

Employees can access their forms from the **Forms** section of their employee profile. A list of the Complete, In Progress, Pending, and Cancelled forms are available to review, along with potential actions.


















First navigate to the **Employee Details Page** (i.e., the employee record) and scroll down the **Forms** section. From here, you can view the following:

- the form name
- the date and time a form was last updated
- the status of a form

- the actions column, which allows you to take a variety of actions on forms

Forms

Export to ... Lock Unlock

<input type="checkbox"/>	Form Name	Updated On	Status	Actions
<input type="checkbox"/>	Standard I9 Form	09/27/2021 03:47 PM	Incomplete	  
<input type="checkbox"/>	Personal Data Form	09/27/2021 03:55 PM	Complete	     
<input type="checkbox"/>	Standard W4 Form	10/06/2021 01:01 PM	Complete	     
















1 - 3 of 3 items

ACCESSIBILITY TOOLS

The **lock** icon indicates whether a form is currently locked or unlocked. Forms automatically lock when the status of the form is “complete”. When employees want to make edits to a completed form, they must notify the HR Admins to unlock the form. For federal compliance purposes, NEOGOV Onboard locks an Employee’s Standard I-9 form by the end of their Start Date. After the employee’s fourth day, the system locks the form for all users in the system and no edits are made unless an HR Admin unlocks the form.

Forms

Export to ... Lock Unlock

<input type="checkbox"/>	Form Name	Updated On	Status	Actions
<input type="checkbox"/>	Standard I9 Form	09/27/2021 03:47 PM	Incomplete	  
<input type="checkbox"/>	Personal Data Form	09/27/2021 03:55 PM	Complete	     
<input type="checkbox"/>	Standard W4 Form	10/06/2021 01:01 PM	Complete	     

1 - 3 of 3 items

ACCESSIBILITY TOOLS

Click on the **form audit trail** icon to view an audit trail of the corresponding form

Employee Details

Form Audit Trail

Form Field

Action type	Performed By	Performed On	IP Address
Accessed	Christopher Lai	09/27/2021 03:59:02 PM	10.01.65.341
Accessed	Christopher Lai	10/06/2021 12:58:02 PM	10.01.65.341
Accessed	Sara Muskalani	10/06/2021 01:01:02 PM	10.01.65.341
Created	Sara Muskalani	10/06/2021 01:01:22 PM	10.01.65.341
Locked	System	10/06/2021 01:01:27 PM	
Accessed	Sara Muskalani	10/06/2021 01:01:44 PM	10.00.2.161

Showing 1 - 6 of 6 items

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Select **Field** to view any changes that were made to the fields on a form. You can view when a field was updated, the new value, the old value, who made the update, when the update was made, and the more.

Employee Details

Field Audit Trail

Form: **Field**

Field Name	Old Value	New Value	Updated By	Updated On	Used Predefined Value	Performed By IP Address
First Name	Sara	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
Last Name	Munster	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
Address	540 Jason Ave	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
City	Los Angeles	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
SSN	455-04-0545	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	No	10.05.01541
State	California	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
ZIP Code	90005	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	Yes	10.05.01541
Signature	View Signature	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	No	10.05.01541
Signature Date	10/06/2021	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	No	10.05.01541
Marital Status	Single or Married filing separately	Sara Munster	Sara Munster	10/06/2021 10:01:23 PM	No	10.05.01541

Showing 1 - 10 of 10 items

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Select **Form** to view any changes that were made to the form itself such as when the form was created, when it was accessed, and when the form locked.

Forms

Export to ... Lock Unlock

	Form Name	Updated On	Status	Actions
<input type="checkbox"/>	Standard 19 Form	09/27/2021 03:47 PM	Incomplete	
<input type="checkbox"/>	Personal Data Form	09/27/2021 03:55 PM	Complete	
<input type="checkbox"/>	Standard W4 Form	10/06/2021 01:01 PM	Complete	

1 - 3 of 3 items

ACCESSIBILITY TOOLS

Returning to the forms section of the employee profile, notice the **preview** and **download** icons. These icons allow you to preview the form in your browser and download a PDF of the completed form.

Forms

Export to ... Lock Unlock

	Form Name	Updated On	Status	Actions
<input type="checkbox"/>	Standard ID Form	09/27/2021 03:47 PM	Incomplete	[Edit] [Delete] [Download]
<input type="checkbox"/>	Personal Data Form	09/27/2021 03:55 PM	Complete	[Edit] [Delete] [Download]
<input type="checkbox"/>	Standard W4 Form	10/06/2021 01:01 PM	Complete	[Edit] [Delete] [Download]

1 - 3 of 3 items

ACCESSIBILITY TOOLS

Documents can be attached to forms. If forms contain attachment field(s) and if documents are attached to those fields, they can be viewed here as well.

Employee Details

Form Documents

Form Name: Personal Data Form
Employee: Sara Markham

+ Export to Zip

Name	Uploaded On	Actions
No items to display		

No items to display

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Select the '+' icon to add a document to a form. Note, this option is only available if the form is unlocked, and you have permission to update the form. You may need to contact HR for more info.

Employee Details

Form Documents

Form Name: Personal Data Form
Employee: Sara Markham

+ Export to Zip

Name	Uploaded On	Actions
SMMarkham Drivers License.jpg	10/06/2021 01:03:41 PM	[Download] [Delete]

1 - 1 of 1 items

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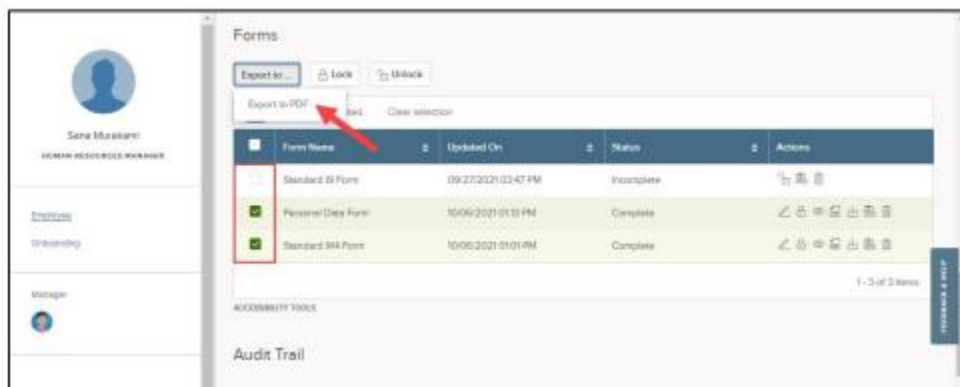
There are two ways to download form documents from this page.

- Click **Export to ZIP** to export documents in bulk into a ZIP file
 - Select the toggle next to the desired forms before taking the export action

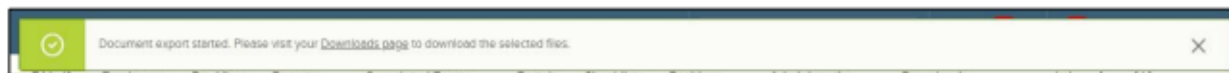
- Click the **download** icon to download individual form documents

Bulk Export Forms

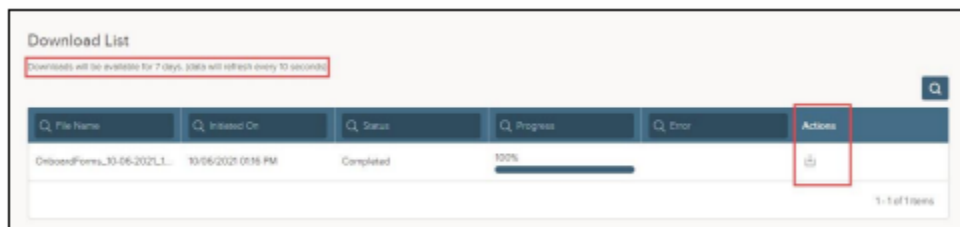
If you have the need to export multiple forms out of the system and into PDF format, you can use the Bulk Export option located in the Forms Section of the Employee Details Page.



Select the forms you would like to export using the toggles. Then, select **Export To...** and **Export to PDF** to trigger a document export job.



A banner message notifies you that a document export has started. You can visit the **Downloads** page by clicking the link in the banner message or by clicking the downloads option in the navigation bar.



- Document export jobs will be displayed on the **download list** for 7 days. Use the downloads list to track the progress of export jobs you initiated.
- Use the **download** icon in the actions column to download the relevant files. Exports will be downloaded in a ZIP file format. Individual forms will be in PDF format.