

# Manage Onboards

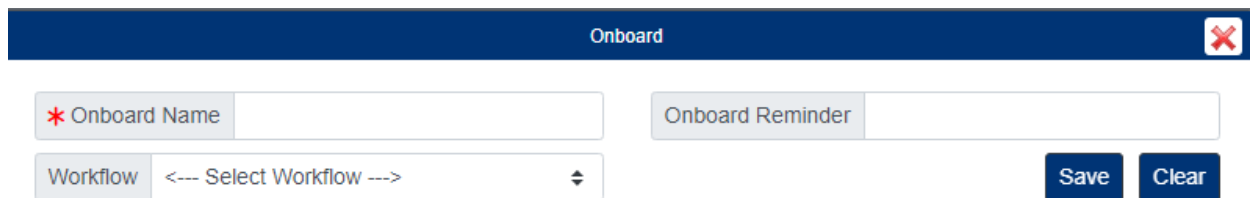
Onboards are designed to track required documents for assigned folders.

From the menu on the left-side of the screen, click Admin, then click Onboards under the first column: Fileroom Management.

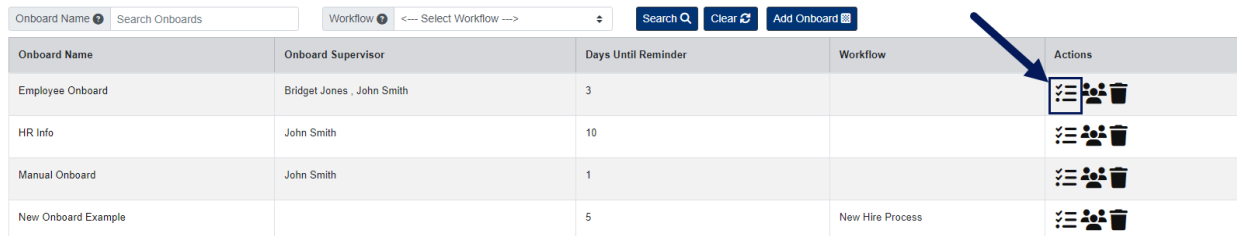
Here, you can search by Onboard Name and Workflow.













## Add Onboard

- Click the Add Onboard button located at the top of the page.



- Enter the Onboard Name.
  - Enter an Onboard Reminder if needed. This is the number of days from the start of the onboard before an onboard is considered past due.
  - Select a Workflow to start when the onboard is completed if needed.
- Click the Save button when you are finished.
- To add Doc Types to the Onboard, click the Add Doc Types button under the Actions column on the right.



Onboard Name	Onboard Supervisor	Days Until Reminder	Workflow	Actions
Employee Onboard	Bridget Jones , John Smith	3		  
HR Info	John Smith	10		  
Manual Onboard	John Smith	1		  
New Onboard Example		5	New Hire Process	  

- A pop-up window will appear...

**Onboard Doc Types** ✖

\* Step Name       \* Doc Type <-- Select Doc Type --> ⌵

Workflow <--- Select Workflow --->       Manual ?      Save Clear

Step Name	Doc Type	Workflow	Manual	Delete
Application	Employee Application		No	✖
Employee Sign Contract	Employee Contract		No	✖
Emergency Contact Form	Employee Emergency Contact Form		No	✖
I-9	I-9	New Hire Process	No	✖

- Enter the Step Name, then select the Doc Type.
- Optional - Select a Workflow to start when this onboard step is completed if needed.
- Optional - Check the box for Manual if you want to allow onboard supervisors to mark an onboard step Complete/Incomplete.
- Click the Save button when you are finished.
- Repeat the steps above for each onboard step.

## Edit Onboard

To edit an Onboard, click the Onboard Name from the list of onboards to open.

When finished making your changes, be sure to click the Save button.

## Delete Onboard

To delete an Onboard, click the Delete button under the Actions column.

## Add/Remove Supervisors

Supervisors of onboards will be notified when the onboard is completed and when steps of the onboard become past due.

Onboard Name	Onboard Supervisor	Days Until Reminder	Workflow	Actions
Employee Onboard	Bridgat Jones , John Smith	3		<span style="font-size: small;">⌵</span> <span style="font-size: small;">⊞</span> <span style="font-size: small;">🗑</span>
HR Info	John Smith	10		<span style="font-size: small;">⌵</span> <span style="font-size: small;">⊞</span> <span style="font-size: small;">🗑</span>
Manual Onboard	John Smith	1		<span style="font-size: small;">⌵</span> <span style="font-size: small;">⊞</span> <span style="font-size: small;">🗑</span>
New Onboard Example		5	New Hire Process	<span style="font-size: small;">⌵</span> <span style="font-size: small;">⊞</span> <span style="font-size: small;">🗑</span>

1. Under the Actions column on the right, click the Add/Remove Supervisors button.

2. Add/remove supervisors as needed, then close the window.

## Assign Onboards


Onboards can either be assigned to individual folders at the Manage Folders page or assigned to all folders in a cabinet at the Manage Cabinets page.

Assign an Onboard to Individual Folders:

Cabinet: HR Employee Files

Description: Notes

Search Clear

Action	Employee ID	Employee Name	Employee Hire Date	Employee eMail	Employee Address	Employee Phone Number	Department	Active Employee	PayStub ID	Email Field
	93-6092971	Adriane Gorrie	4/15/2018	agorrie@lsspdms.com	952 Pearson Trail	186-120-5250	Administrative	Yes		
<input type="checkbox"/>	44-3937246	Erica Baptiste	12/05/1917	sbaptiste3@redcross.org	5 4th Junction	450-586-0392		No		
<input type="checkbox"/>	25-9918084	Harwell Leishman	1/5/2019	hleishman4@shutterfly.com	7 Veith Junction	269-670-6363		No		

1. Click the Folders button below the PinPoint menu on the left side of the page.
2. Select the Cabinet the folder belongs to, then search for the folder.
3. Under the Action column, click the Start Onboard
4. Select the Onboard, then click the Add
  - o Clicking the Retroactive box means existing documents in the folder will be counted against the onboard.

Assign an Onboard to all Folders in a Cabinet:

Cabinet

\* Cabinet Name: HR Employee Files

Default Doc Type: <-- Select Doc Type -->

Description: Notes

Automatic Onboard: <-- Select Onboard -->

Lockdown:  Disable Cabinet Edit:  Automatic CM Folder:





Last User: System System

Date Added: 03/07/2019

Date Edited: 02/07/2022

Add Folder Field: [Icons]

Save Clear

* Field Name	Folder Title	Required	Visible	Size	Unique	Field Type	Mask	Tool Tip	Actions
Employee ID	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	10	<input type="checkbox"/>	Text			
Employee Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input type="checkbox"/>	Text			
Employee Hire Date	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input type="checkbox"/>	Date Type	dd-mm-yy		
Employee eMail	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	99	<input type="checkbox"/>	Text			

1. Click the Cabinets button below the PinPoint menu on the left side of the page.
2. Click the Cabinet Name to open the cabinet settings.
3. Select the onboard you want assigned to all folders in the cabinet using the Automatic Onboard dropdown field.
4. Click the Save button when finished.