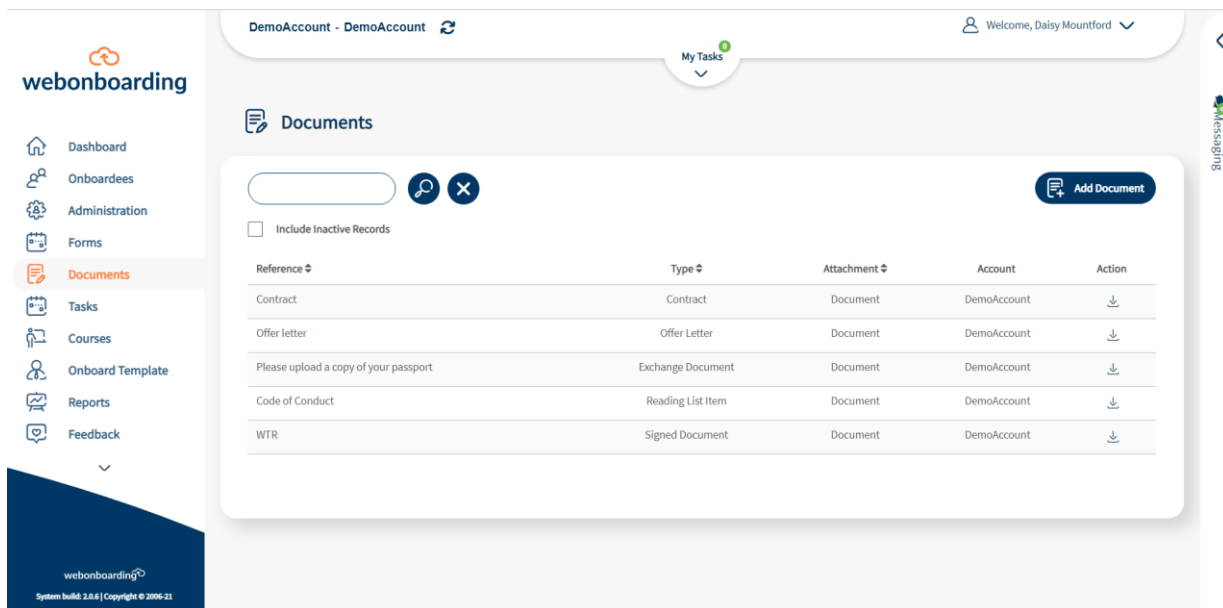


Adding Reading Items

Initial creation of documents may be done by your implementation consultant, however, should you need to upload any new Reading Items you can do so. The best use of Reading Items is for documents or web links which you provide to the Onboarder to read as part of their induction or pre-joining.

Click documents on left-hand side of the screen.



You can then click “add document”.



Adding Reading Items

If “Reading Item” is selected as the Document Type , then some additional options display on the screen.

The screenshot shows a web form titled "Documents > New". At the top, there are navigation buttons: "Back", "Undo", and "Save". Below these are two tabs: "General" (selected) and "Companies". The "General" section contains several fields: "Reference" (text input with "Reading Item"), "Description" (text input with "Reading Item"), "Document Type" (dropdown menu with "Reading List Item"), and "SubType" (dropdown menu). Below these is a "Mandatory" checkbox which is currently unchecked. The "Attachment" section has a "File" input field, a "Choose file" button, a "Remove file" button, and an information icon. The "Status" section has three radio buttons: "Active" (selected), "Inactive", and "Active".

You will need to select one of the Sub Types:

Sub-Type	Description
Download	These documents will provide a downloadable document for Onboardees to read and mark as read.
Link	This will provide Onboardees with a web link to navigate to.

If the reading the document is mandatory then select the Mandatory check box. Onboardees will need to mark mandatory reading items as read in order to complete this stage of the process.

Mandatory

Ensure that the Status is set to Active, this ensures that the new document is available for use.

Status

Active

Inactive

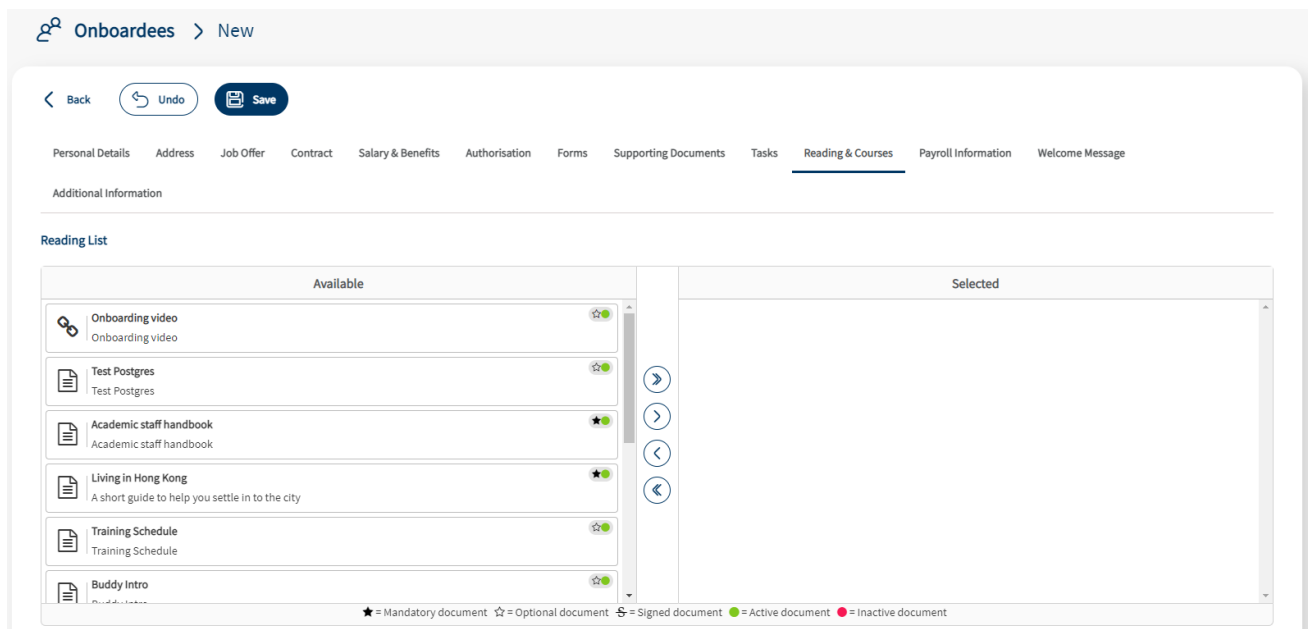
Active

Now use the companies tab at the top of the page to select the Companies in Webonboarding that will have access to this document.



Click Save.

Adding Reading Items to Onboarder Processes

You can add Reading Items to new or existing Onboarder processes. Navigate to Onboarders and then either Add Onboarder or select an Onboarder. Then select 'Reading & Courses' from the tabs at the top of the Onboarder profile.



In this section you will see all of the available Reading Items for the Onboarder on the left. If you are adding items to an existing Onboarder you need to press the 'Edit' button first, for new Onboarders you can select them straight away.

To add an item you can either double click the desired Reading Item, select one and use the  button or use the  button to add all documents.

You will also see a key at the bottom to differentiate the types of Reading Item.

★ = Mandatory document ☆ = Optional document  = Signed document  = Active document  = Inactive document