Onboarding Manager 1301 Part 2 – New System Features and Enhancements

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NEW SYSTEM FEATURES

Documents page on the HR User Interface

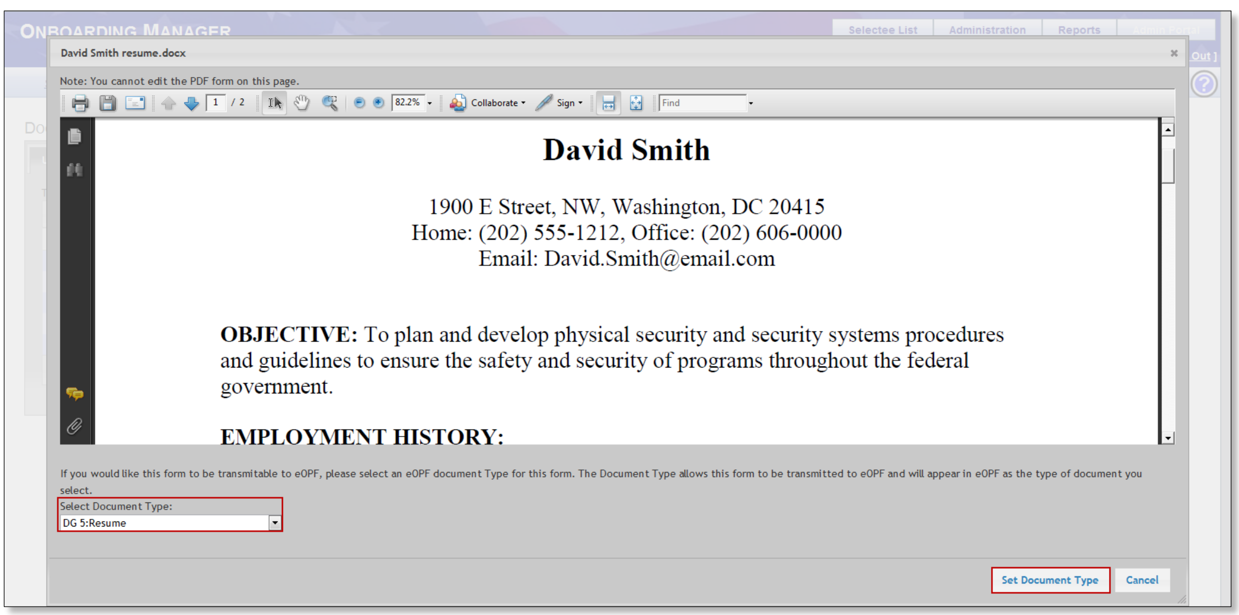
Supporting documents from a selectee's USA Staffing record are now available in Onboarding Manager. These documents are viewable in Onboarding Manager when an applicant is selected from a certificate and the record is sent to Onboarding Manager from the USA Staffing system.
This release also provides the capability to upload documents directly into Onboarding Manager.

Documents can be viewed within the HR user interface by opening a selectee record and navigating to the Documents page. The Documents page includes two tabs:

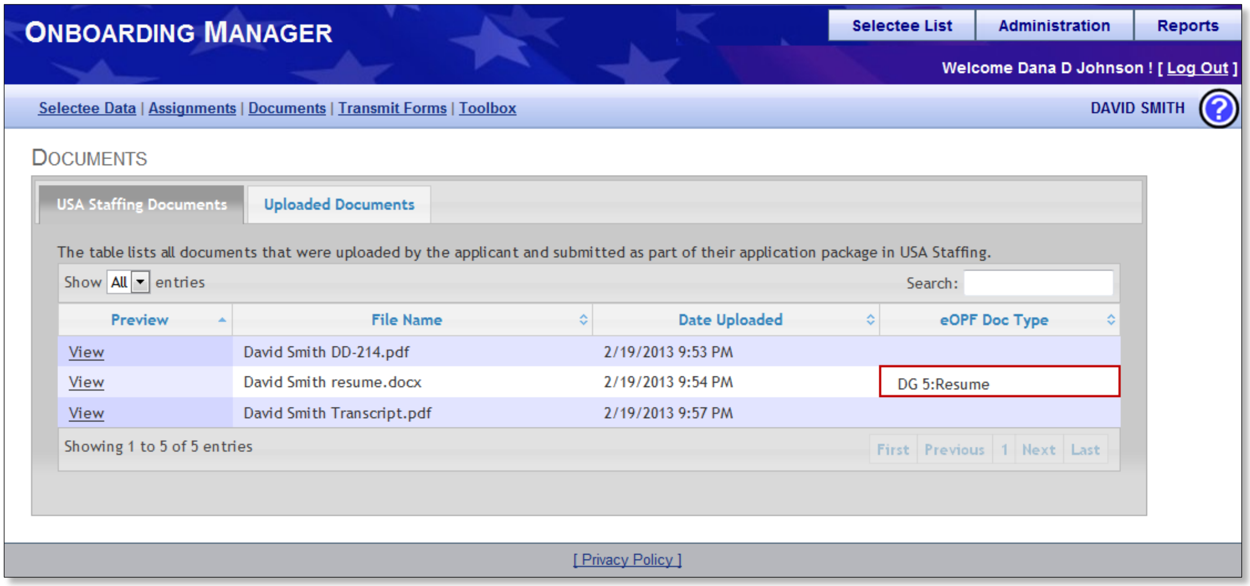
- USA Staffing Documents
- Uploaded Documents

The ***USA Staffing Documents*** tab lists all documents that were submitted as part of the selectee's application package in USA Staffing. These documents include those submitted by the selectee and documents uploaded by the HR user. The ***USA Staffing Documents*** table displays the original file name of the document as it appears in the selectee's USA Staffing record. This tab also displays the date and time the documents were originally uploaded into USA Staffing, as well as the document type that will be transmitted to the electronic Official Personnel Folder (eOPF).

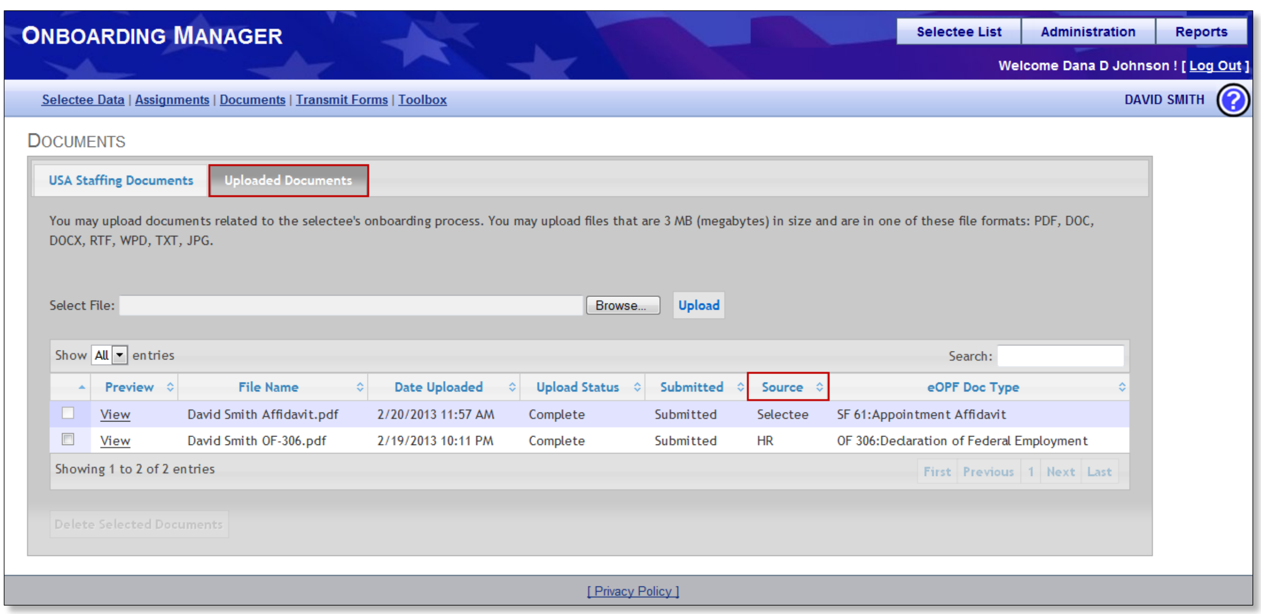
To preview these documents, HR users click ***View*** next to the document file name and the document will display in an Adobe PDF format. HR users select from the options in the ***Set Document Type*** drop-down list and then click the ***Set Document Type*** button to indicate the type of document that will be transmitted to the eOPF.



The selected document type will display in the ***eOPF Doc Type*** column within the ***USA Staffing Documents*** table.



The ***Uploaded Documents*** tab lists the documents that were uploaded directly into Onboarding Manager by the HR user or by the selectee.



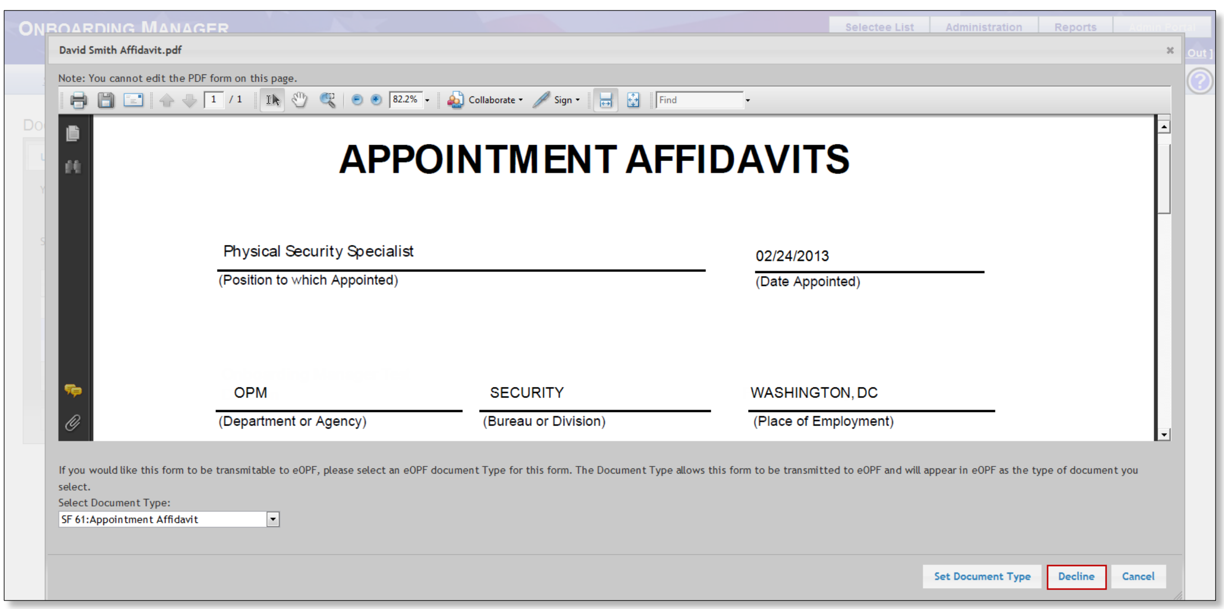
HR users upload documents to a selectee record by clicking ***Browse***, then locating the file and clicking ***Upload***. The uploaded document will display the type of user who uploaded the document under the ***Source*** column.

The **Upload Status** column will display one of the following statuses:

- *Complete* – the PDF conversion process was successful and the document is uploaded and can be previewed.
- *Processing* – the document passed the virus scan and is being converted to a PDF file.
- *Pending Virus Scan* – the document is currently undergoing the virus scan.
- *Virus Detected* – a virus was detected and the document will not be uploaded.
- *Failed* – the PDF conversion process failed; retry the upload process.

The HR user can also set the ***eOPF Doc Type*** for the uploaded document so that is transmittable to the eOPF. **Note**: USA Staffing Documents and documents uploaded by the HR user are not viewable to the selectee in Onboarding Manager. In addition, HR users cannot view documents uploaded by the selectee until the selectee submits the uploaded document to the HR contact.

HR users have the capability to decline a document that is uploaded and submitted by the selectee. Documents are declined by going to the ***Uploaded Documents*** table, clicking ***View***, and then clicking **Decline** from the PDF format preview screen. Declining the document will send it back to the selectee and the document is removed from the HR user's ***Uploaded Documents*** table.

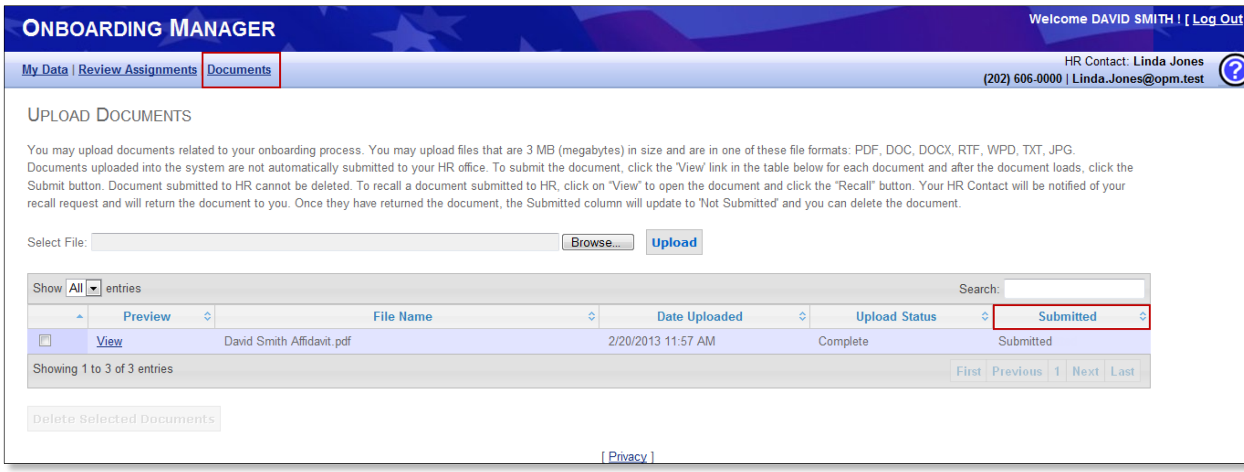


HR users can delete an uploaded document by checking the box next to ***View,*** then clicking ***Delete Selected Documents***. **Note**: HR users may only delete uploaded documents that HR users have uploaded. HR users cannot delete documents uploaded by selectees.

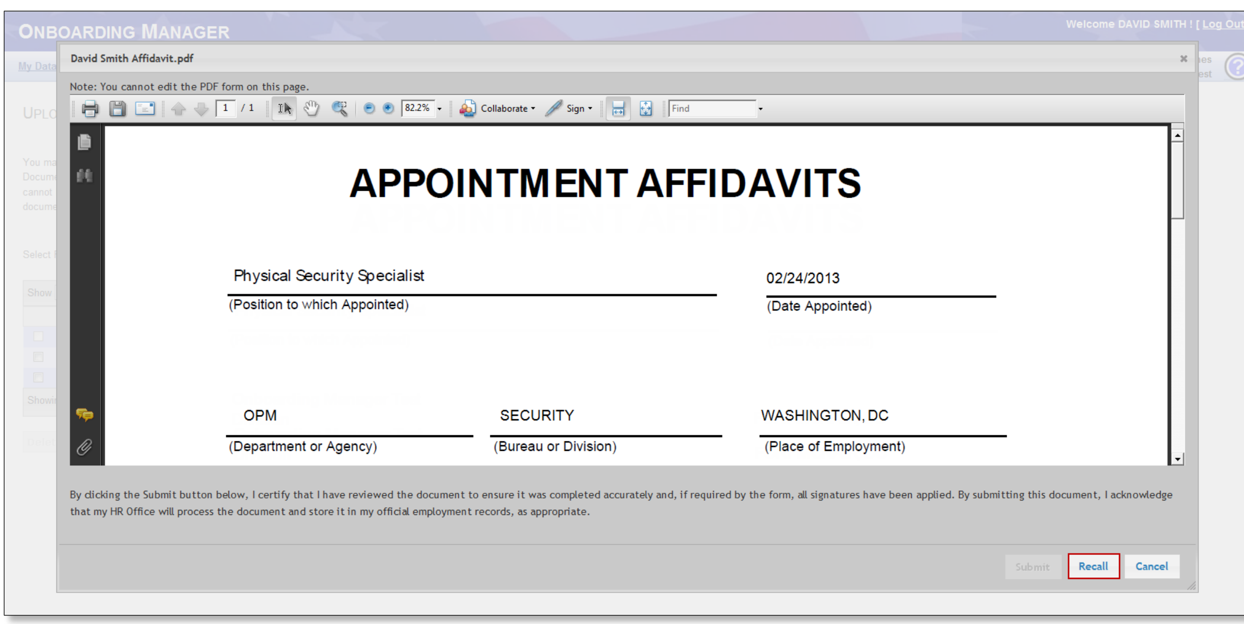
Documents page on the Selectee Interface

The Documents page has also been added to the Selectee interface. Selectees can upload documents and submit them to their HR contact. Selectees upload documents to their record by clicking ***Browse***, then locating the file, and clicking ***Upload***. Selectees preview an uploaded document by clicking ***View*** next to the document file name and the document will display in an Adobe PDF format. Selectees can then submit a document by clicking ***Submit*** from the PDF format preview screen.

The ***Upload Documents*** table displays the details for the uploaded document including the submission status of the document in the ***Submitted*** column. The submission statuses are *Submitted* and *Not Submitted.*



Selectees can recall a submitted document listed in the ***Upload Documents*** table by clicking ***View***, then clicking ***Recall*** from the PDF format preview screen. Recalling the document will send an email to the HR Contact requesting the document to be sent back to the selectee. The document will display a *Submitted* status until the HR user declines the document.

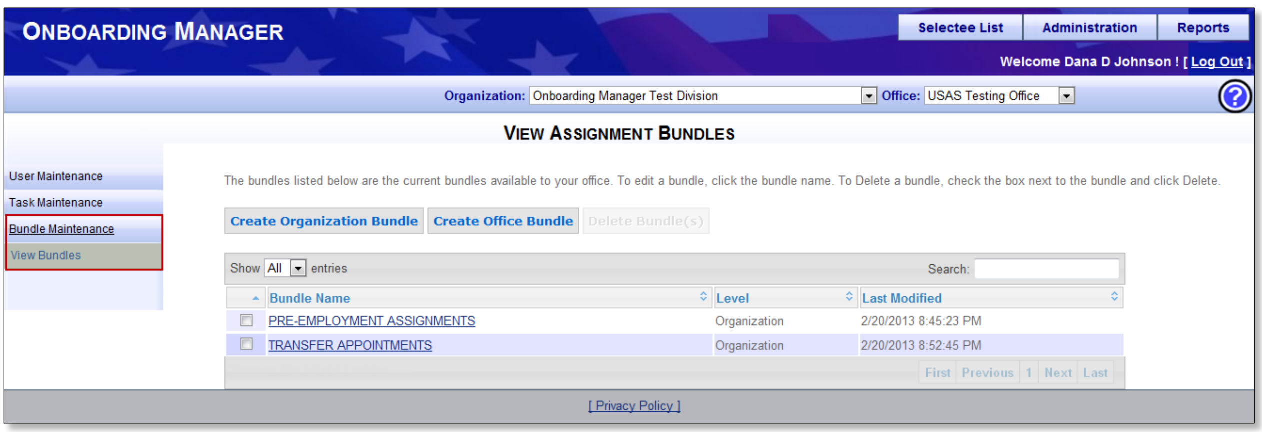


After the HR user declines the document, the document is removed from the HR user's ***Uploaded Documents*** table, and the submission status changes back to *Not Submitted* on the selectee's ***Upload Documents*** table. The selectee can delete the document from the table by checking the box next to ***View***, then clicking ***Delete Selected Documents***. The selectee may then upload an updated version of the document. **Note**: Selectees may delete documents that are in *Not Submitted* status. Selectees cannot delete documents that are in *Submitted* status.

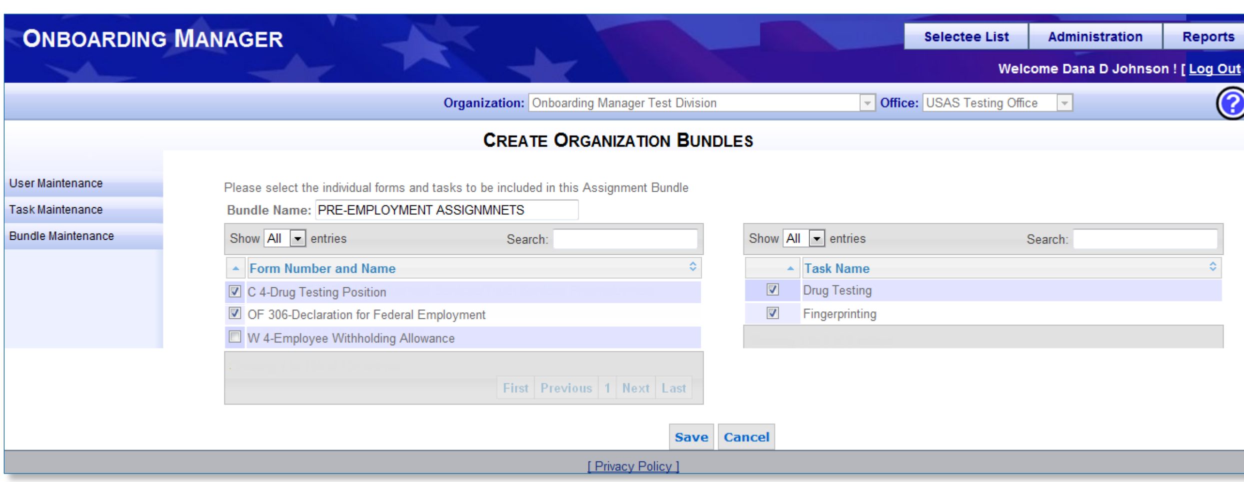
Administration

Bundle Maintenance

Bundle Maintenance has been added to the topic areas in Administration. A bundle is a set of forms and/or tasks that can be assigned to the selectee. A bundle consists of at least one form and one task; or two forms or two tasks. Bundles provide HR users with an option to simultaneously select forms and tasks that are routinely assigned to selectees. This feature eliminates the need to individually assign forms and tasks and reduces inadvertent omission of assignments to selectees.

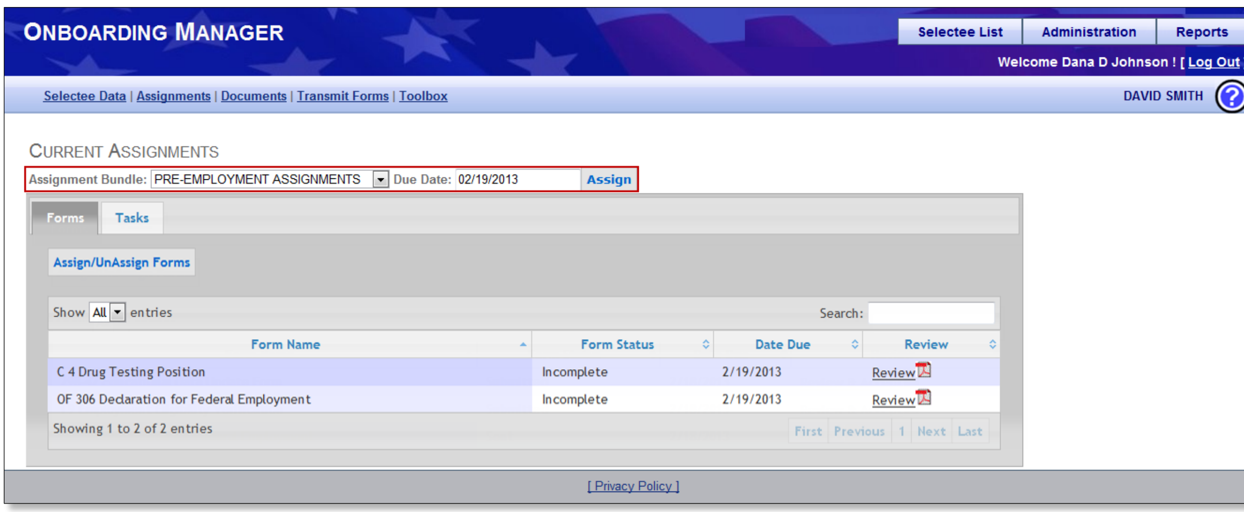


To create an Organization or Office bundle, the Administrator clicks ***Create Organization Bundle*** or ***Create Office Bundle*** depending on the Administrator's access level. The bundle creation process is identical for the Organization and Office levels. After clicking ***Create Organization Bundle*** or ***Create Office Bundle*,** the full list of forms and tasks that have been created in that Organization and/or Office will display. Administrators will need to assign a title to the new bundle, select the appropriate forms and tasks, and click ***Save***.



Assignment bundles can be modified by selecting the bundle from the ***View Assignment Bundles*** page and checking or unchecking the appropriate forms and tasks. Assignment bundles can also be deleted by checking the box next to the bundle name and clicking ***Delete Bundle(s)*.**

Once a bundle has been created in Administration, HR users can go to the selectee's Assignments page, select the bundle from the ***Assignment Bundle*** drop-down list, enter a ***Due Date*** for the assignments, and click ***Assign***. The same due date will be assigned to all assignments. If different due dates are required, HR users can manually enter the appropriate due dates for individual forms and tasks.



SYSTEM ENHANCEMENTS

HR User Interface

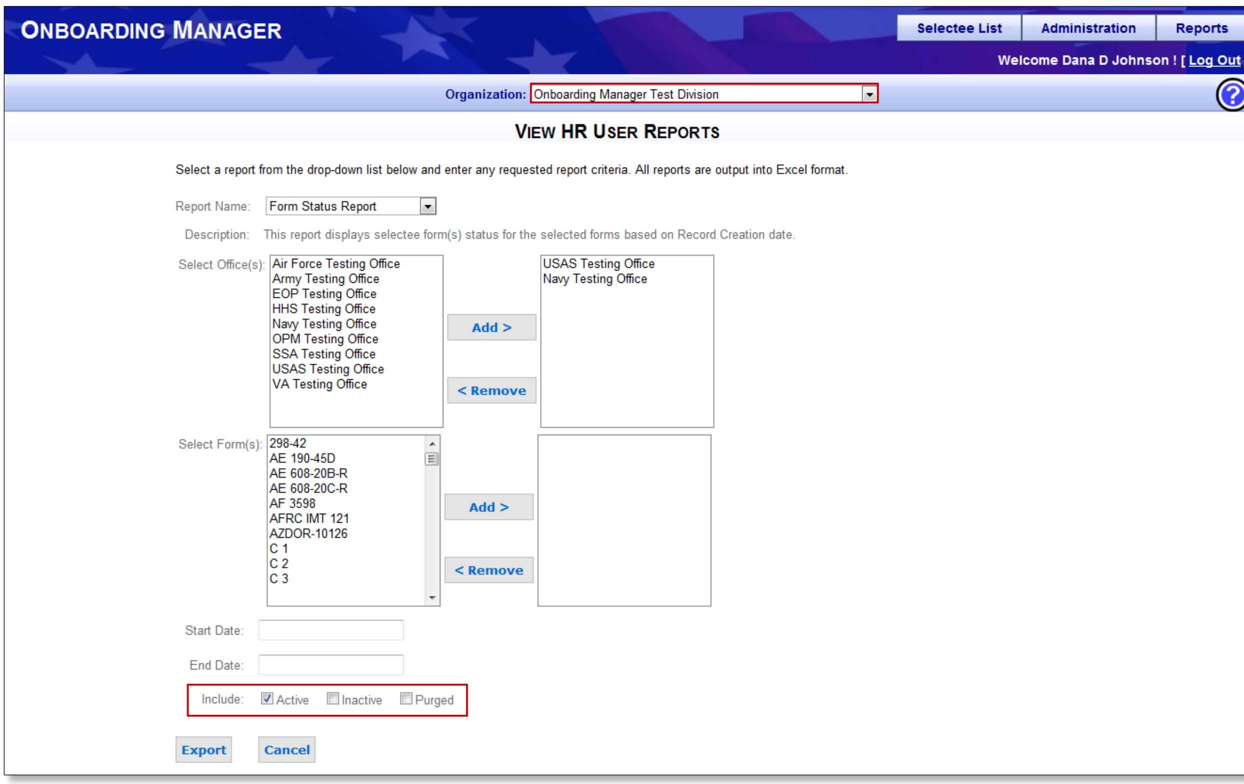
Reports

The Reports topic area was previously located within the Administration work area and accessible only to Organization and Office Administrators. Reports is now an independent work area that can be accessed by Administrators as well as any HR user with a role that permits access to Reports.

In addition, Organization and Office Administrators can restrict a HR user's ability to access the Reports page for specified offices. When a HR user with restricted access clicks Reports and selects a report to be generated, the list of offices to select from will only display the offices in which the user has permission to access.

The ***Office*** drop-down menu has been removed from the help menu bar in the Reports topic area. To generate reports, HR users can select one or more offices in which their role permits them access. If no office is selected, the report will generate for all offices available to the HR user within the Organization they have accessed.

When generating reports, the criteria for all reports are defaulted to *Active*. Reports defaulted to *Active* will display information for active selectee records. HR users also have the option to select *Inactive* and/or *Purged* to generate report information for inactive and/or purged selectee records.



Exports

The *Accepted Date* column on the Forms Status Report will populate with the date that the HR user signs and accepts forms that require HR signatures. When a form requires two HR signatures, the *Accepted Date* column will populate with the date the last signature was received.

The *Last Login Date* column on the Form Status Report and the Workload Report will populate with the date the selectee last accessed the system.

Restrictions

An Organization or Office Administrator can restrict a HR user's access to view the ***Selectee List*** for an Office. When a HR user with restricted access selects an Organization and Office using the drop-down lists in the Onboarding Manager system, the table will not display selectee data.

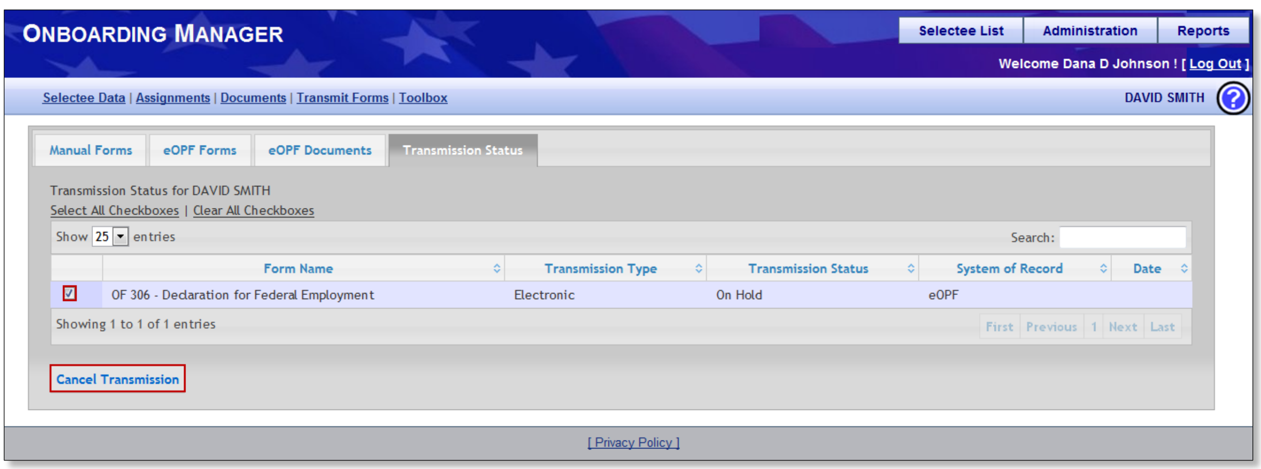
This restriction allows HR users to run reports across offices without being able to access and modify selectee data or view forms.

Selectee Data and Form Restrictions

The questions in the ***Selectee Data*** questionnaire that relate to a restricted form will not be displayed to HR users who are assigned a role restricting that form. The only exception is when two assigned forms use the same questions and only one of the forms is restricted by the HR user's role. In this case, all questions associated with the restricted form are not displayed, except the questions associated with the non-restricted form.

Transmit Forms

HR users with access to transmit forms to an electronic system of record may also cancel the transmission of forms that have been marked for transmission but have not yet been sent to a system of record. From the ***Transmission Status*** tab, HR users may cancel any form or document that is in *On Hold* status. After the transmission is cancelled, the form will return back to the ***eOPF Forms*** tab, and the document will return back to the ***eOPF Documents*** tab. The form status will also change from *Sent* back to *Ready to Send*.



View Roles

A warning message will display when an Organization or Office Administrator attempts to delete an HR user role. The Administrator will be given the option to cancel the action or continue with deleting the role. The warning message will also display the name of all HR users who are currently assigned to the role that is being deleted. All HR user accounts that were assigned to the deleted role will no longer have any role restrictions until another role is assigned.

System Corrections

HR USER INTERFACE

Task Maintenance

Organization level roles, tasks, and now bundles are visible across agency offices. This release ensures that Office level roles, tasks, and bundles are only visible within the office in which they were created.

Reports

The *Transmission Date* column on the Forms Status Report correctly populates with the date the form was transmitted to the eOPF.

The Cycle Time Metrics Report will display selectee record information based on the *Actual EOD* date instead of the date the selectee record was created.

HR User Login Tracking

All Onboarding Only HR user accounts are created in USA Staffing. The USA Staffing system is designed to deactivate user accounts that have been inactive for more than 90 days.
Prior to this release, the USA Staffing system did not recognize account activity for Onboarding Only users and their accounts were deactivated after more than 90 days of inactivity within the USA Staffing system (the system in which the account was created).

This release ensures that the last login date is updated in USA Staffing each time a user successfully logs into Onboarding Manager. The last login date is recorded in USA Staffing for all users who have logged into Onboarding Manager regardless of the user's account type.

HR USER AND SELECTEE INTERFACE

System Timeout Message

A timeout warning message will display after 30 minutes of system inactivity on both the HR user and Selectee interfaces regardless of the type of internet browser accessed.