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NEOED/NEOGOV Onboarding Module User Guide

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Introduction

The Onboarding module serves as a centralized hub that accelerates hiring by streamlining new hire paperwork and processes and seamlessly communicating tasks and progress with various users/departments. The module also shares important information about the College and resources needed to help new hires be successful.

Managers play a key role in the onboarding process. They receive notifications informing them when an employee begins and completes the hiring process and when they have a task to complete related to the hire. The system allows managers to monitor an employee's progress toward completing the onboarding tasks and much more.

If you need assistance with features or have questions, please contact the Human Resources Office at hr@lee.edu or (281) 425-6875.

Getting Started: Log In to NEOED

To access the Onboarding features in NEOED, you must first log into the system.

I. **Current Employee with Network Access**
   Employees who have been assigned network access through IT (i.e., have a Lee College username and password for logging into devices) will log in using the College's Single Sign On (SSO) website (https://leecollege.onelogin.com/launch/1566527). When logging in to the SSO site, use the username and password IT created for you. If you need assistance logging into SSO, contact the Help Desk at helpdesk@lee.edu or (281) 425-6952.

II. **New Employee Waiting to Receive Network Access**
   Employees who have not received their network credentials from IT yet will temporarily log into NEOED using the non-SSO website (https://login.neoed.com/) to complete their onboarding tasks. You will receive an email from NEOED with instructions on how to log in and create your own password. Your personal email address is typically your username. Once your network access is created by IT, you will begin accessing NEOED through the College's SSO website mentioned above. If new employees have trouble logging in to the non-SSO site, contact the Human Resources Team for assistance at hr@lee.edu or (281) 425-6875.

Employee Perspective

There are two places employees can access onboarding-related items in NEOED, the Unified Self-Service (USS) Dashboard (main home page) and by navigating to the Onboarding module's dashboard. All tasks can be accessed and viewed from the USS Dashboard. If authorized, you may be able to view additional information such as details about your employment (e.g., ID #, contact information, job description, department, hire date, direct report information – if applicable, etc.), view and download your completed forms, and add notes in the Onboarding Dashboard. The information provided below outlines how you can access both dashboards.

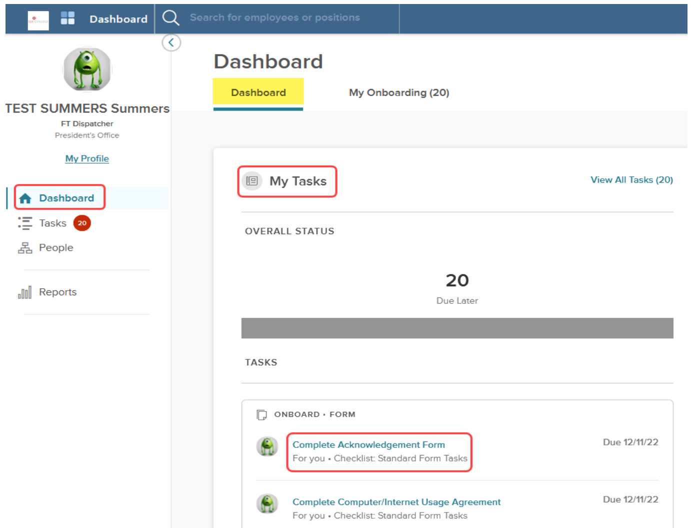
Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)

The Unified Self-Service (USS) Dashboard is the home page employees and managers see when they first log into NEOED. As an employee (e.g., new hire or rehire), you can access the onboarding portal and checklist of tasks using the Dashboard or Tasks links.

Dashboard Link

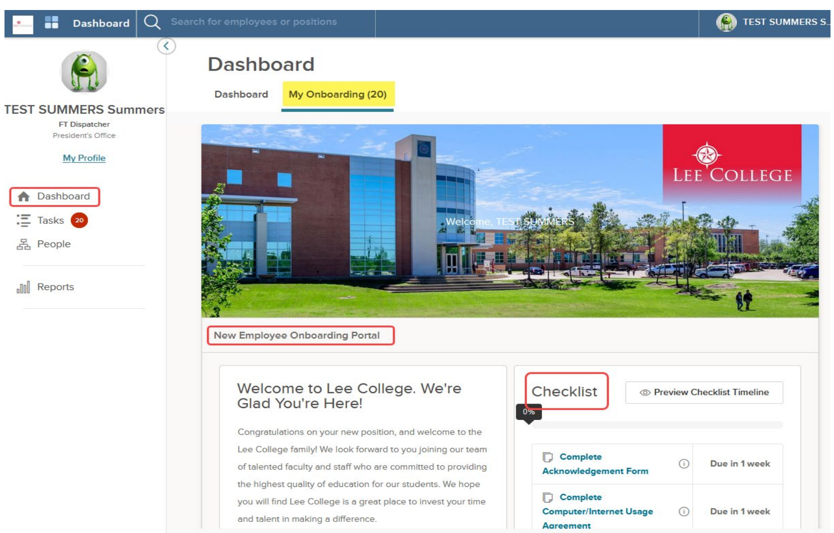
Dashboard Tab > My Tasks

Any action required/task assigned to you will be listed in the My Tasks section located on the Dashboard tab. Click the appropriate link to open and complete each task.



My Onboarding Tab

Click the My Onboarding tab to view the agency-wide portal (i.e., New Employee Onboarding Portal) and applicable sub-portals that may be assigned to you based on your position or department.



Portal(s)

Portals consist of various widgets (e.g., sections) that share information about the College. The Checklist and Chat widgets are important to point out.

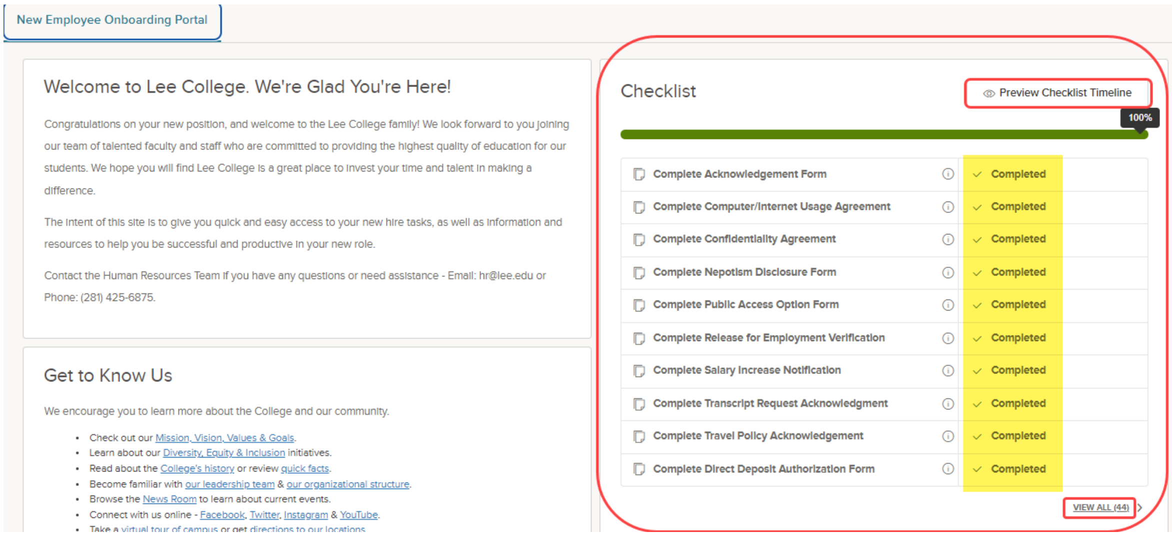
I. Checklist

Any tasks assigned to you will populate in the Checklist section.

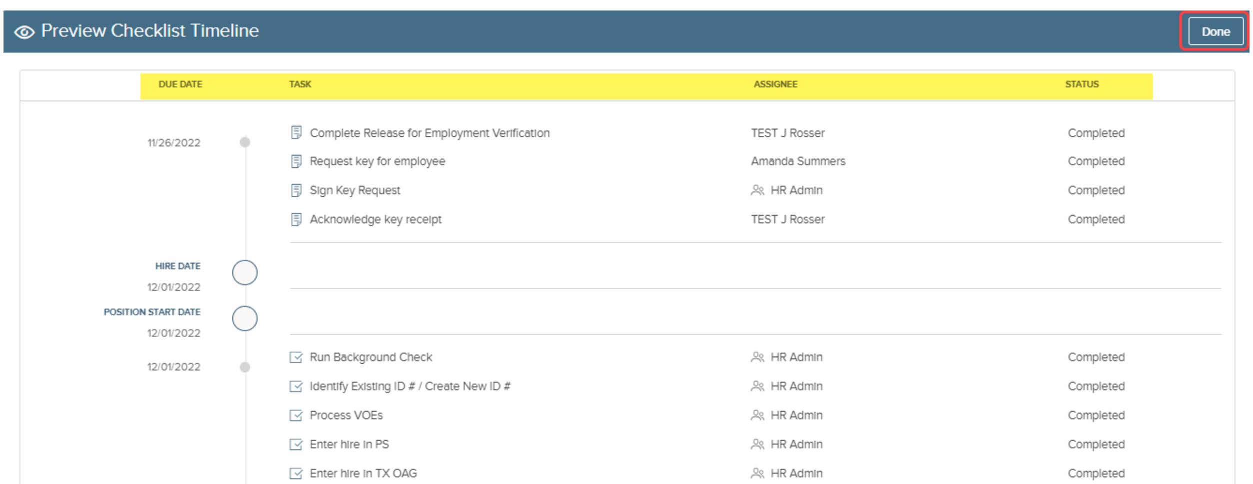
- Click each task and follow the instructions to complete the assigned items. Different types of tasks/actions may be assigned to employees:
  - Download a Document – You must download the document in order to mark the task as complete.
  - Link – You must click and open a link before you will be allowed to mark the task as complete. The link opens a new webpage allowing you to view the information.

- Video – You must watch the entire video before you can mark the task as complete.
- Acknowledgement Form – You must fill out the form per the instructions that are provided. Some fields may be grayed out if you do not have access to complete them.
- Attachments – You must upload a specific document to complete the task.

- The green bar at the top of the section shows the percentage of tasks completed.
- Click View All to see the full list of tasks.

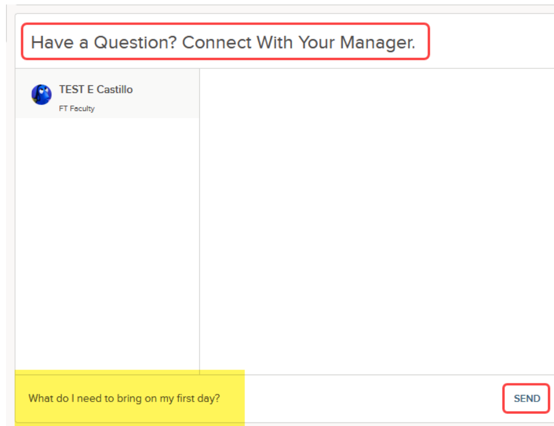


- Select Preview Checklist Timeline to view a chronological summary of actions taken pertaining to the checklist (i.e., due date, hire date, tasks, assignee, status).



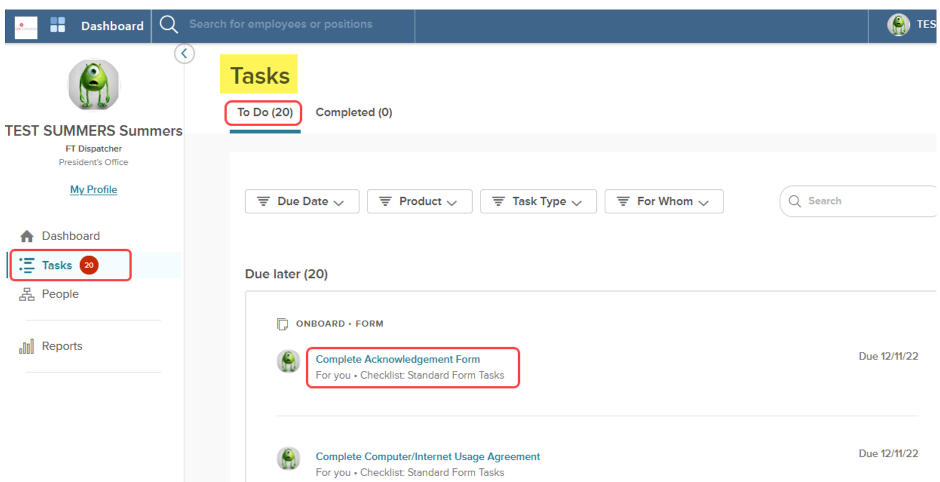
II. Chat

This feature offers a quick and convenient way to connect with your supervisor. Type your message in the bottom section and hit SEND. You may receive an email making you aware that a new message was sent to you via chat.

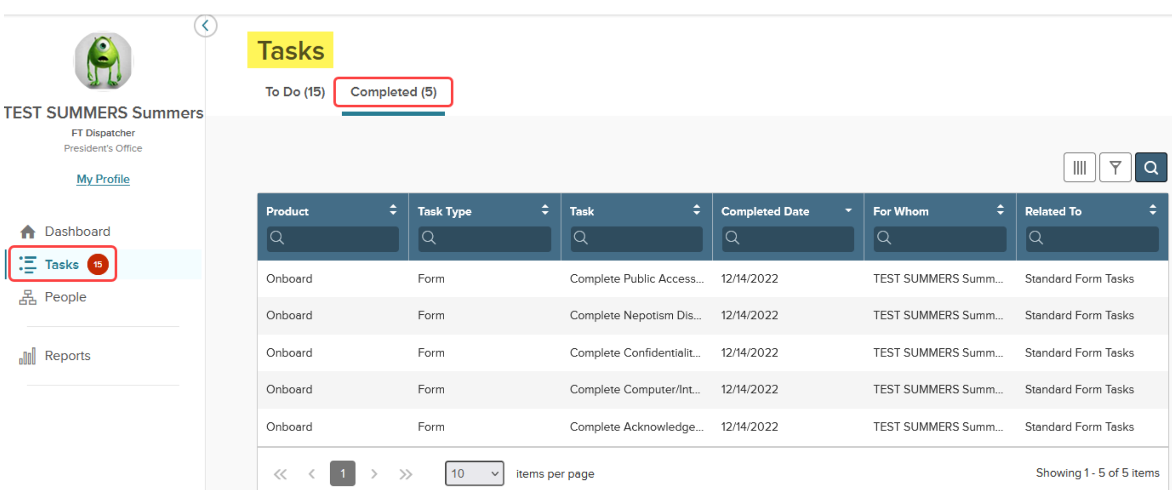


Tasks Link

You can view open and completed tasks from the Tasks link. Actions you need to take are displayed under the To Do tab. Click the appropriate link to open a task.

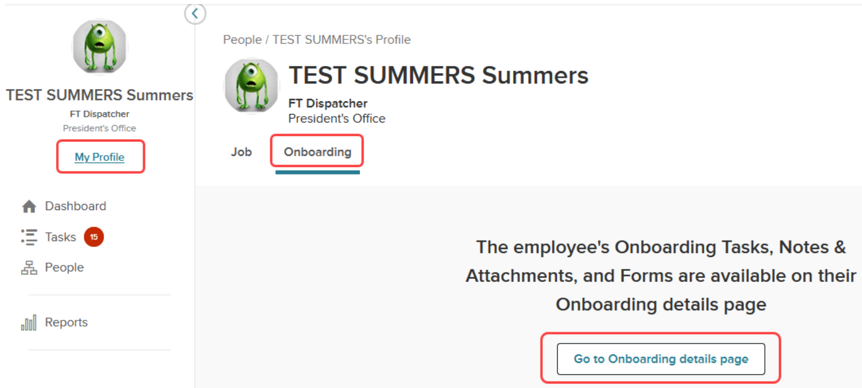


Completed tasks may be viewed by selecting the Completed tab.



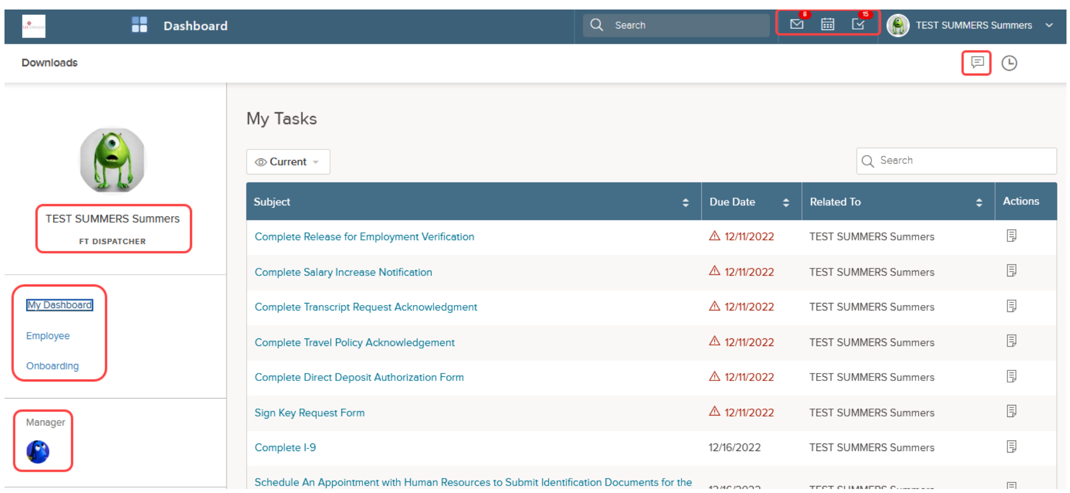
Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard

Follow these steps to navigate to the Onboarding Dashboard/module from the USS Dashboard: Click My Profile > Onboarding tab > Go to Onboarding details page.



Onboarding Module Dashboard

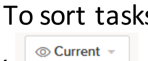
The following information will display in the navigation fields on the left: Your picture, name and position, links (i.e., My Dashboard, Employee and Onboarding), the name of your manager and the name(s) of your direct reports if applicable. On the navigation fields in the upper right corner of the page, you will see links to access your messages, calendar, tasks and chat.



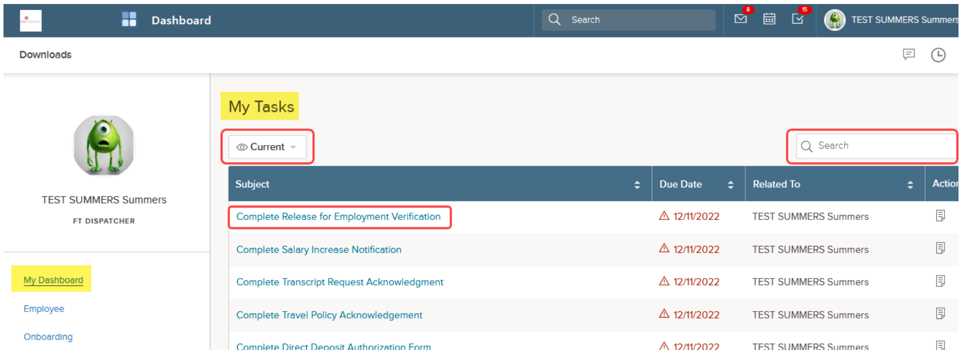
Links – My Dashboard, Employee & Onboarding

I. My Dashboard

View tasks assigned to you in the My Tasks section.

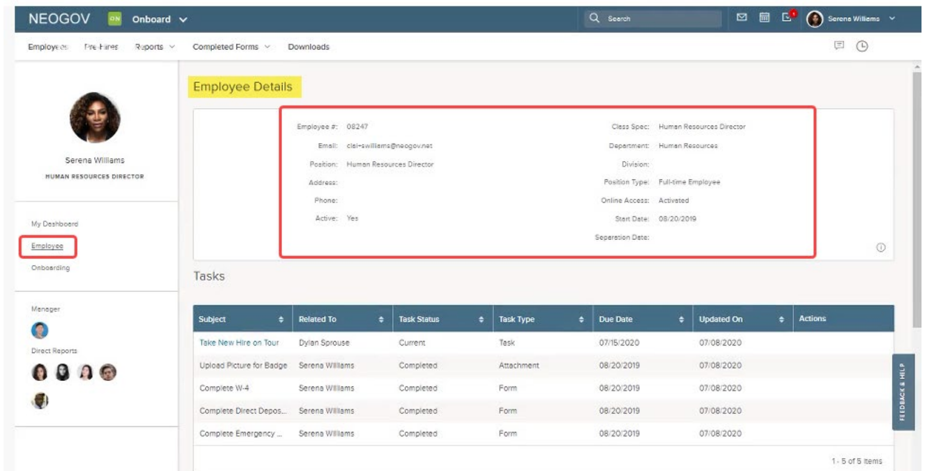
- Complete Task – Click a task link to open and complete the required action.
- Sort Tasks – To sort tasks based on their status (i.e., Current, Completed, Canceled, Pending or Skipped), click the view box  and select the appropriate option.

- Search Tasks – Use the search field on the right to look up items related to tasks.

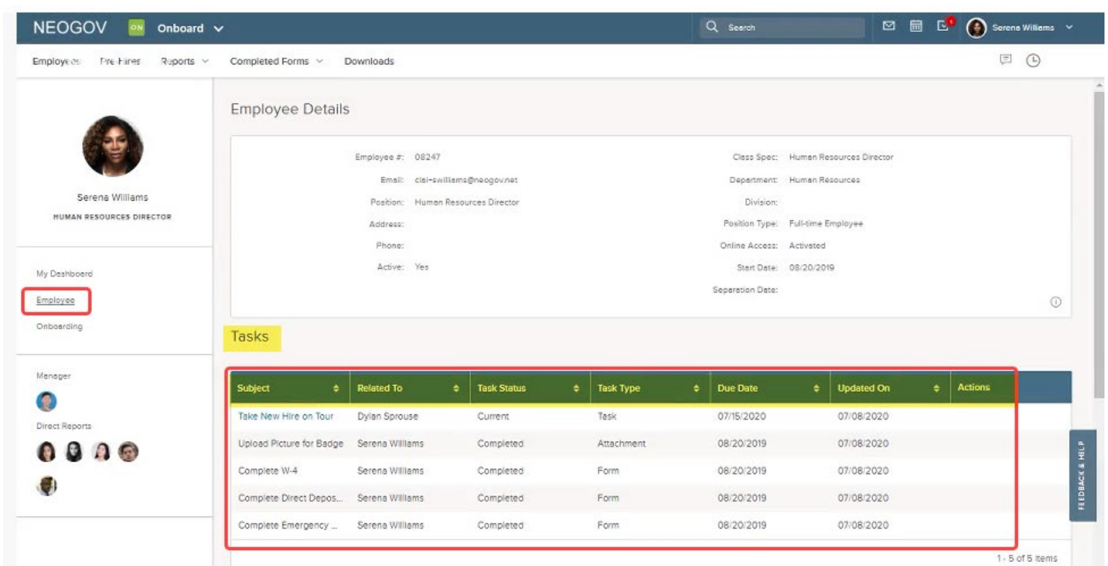


II. Employee

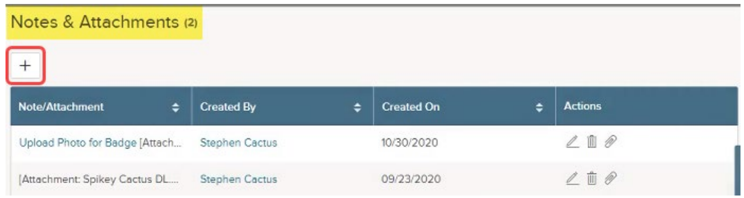
- Employee Details – View employee information such as position, department, start date, etc.

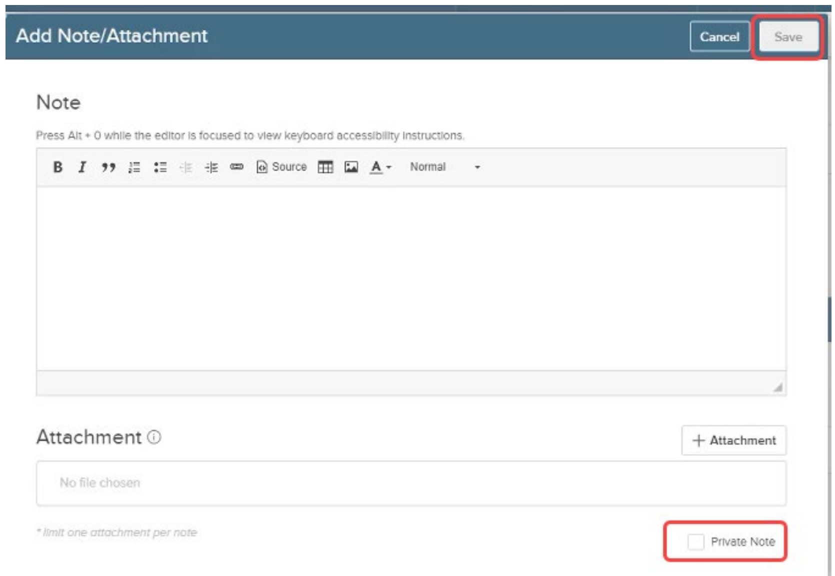


- Tasks – This section is a high-level overview of all tasks assigned. Columns show the task, status, type and due date.



- Notes and Attachments Forms – Add notes or attachments to your profile.
    - Check private if you do not want to share the information.
    - Documents added in attachment tasks are also stored here.

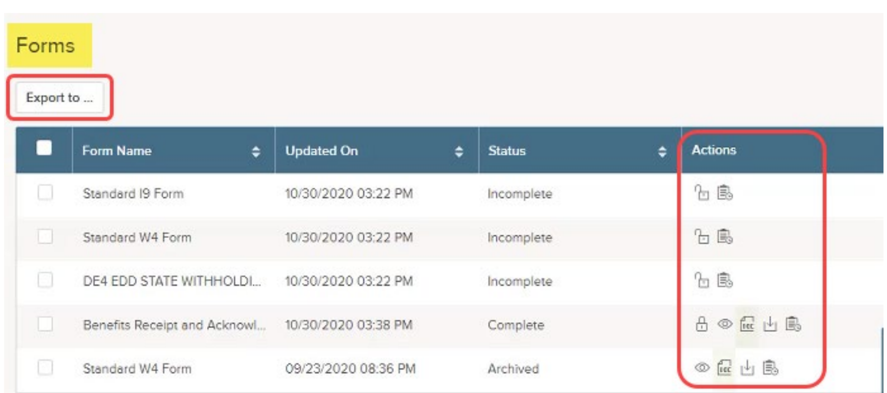




- Forms – View and download forms you have completed, as well as attachments that were required as part of an onboarding task. Under the Actions column, you can perform the following activities:

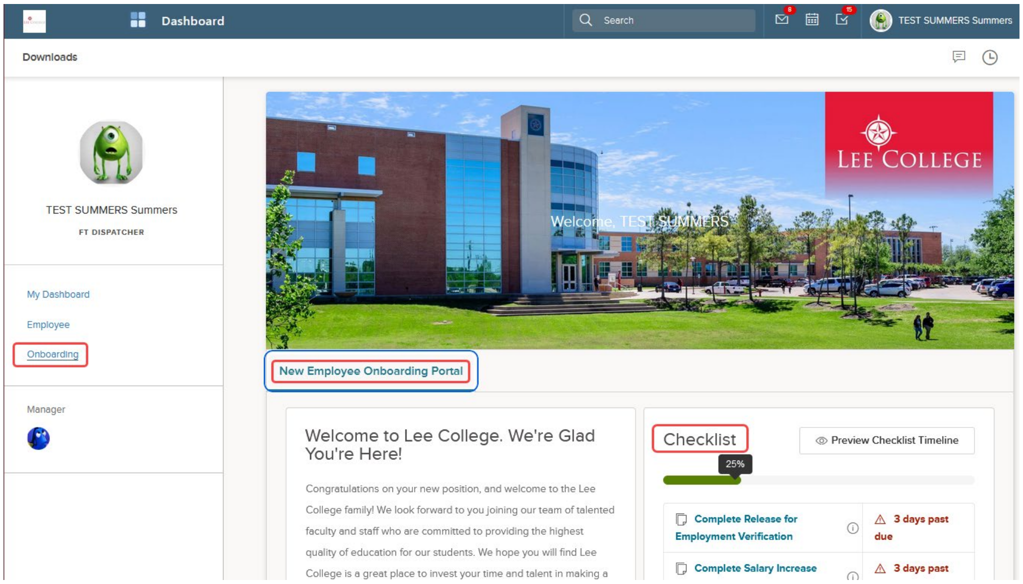
    - Export Forms – In the first column, check the applicable form(s) > click Export To > Export to PDF.
    - View Forms – Select the eye icon to view the form as a pdf.
    - Open an Attachment – Click the form document icon to view an item attached to a particular form (e.g., voided check for direct deposit form). Click the name of the document to view it. In the actions column, select the download or trash icons to take the associated actions.
    - Download Forms – Click the download icon.
    - Audit History – Select to view the history of actions taken related to this document.

NOTE: Completed forms are locked and cannot be edited without permission from Human Resources.



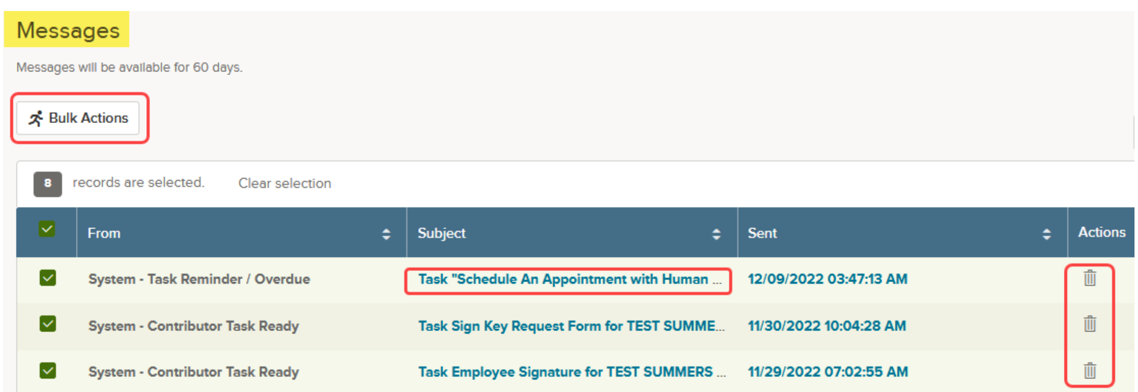
III. Onboarding

Like the USS Dashboard, the Onboarding tab displays applicable portals (i.e., agency-wide New Employee Onboarding Boarding and assigned sub-portals) mentioned above. (See My Onboarding Tab section above for more information about portals, checklists and the chat feature.)



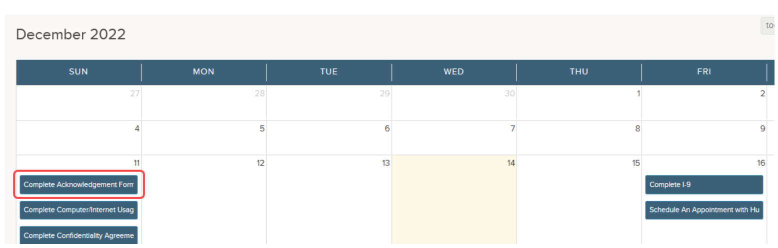
Messages 

Clicking this icon allows you to view all messages that have been sent to you. Select the blue link to open and read a message. Click the trash icon in the action column to delete an individual message. To delete messages in bulk, check the messages you want to remove, click Bulk Actions > Bulk Delete > Ok.



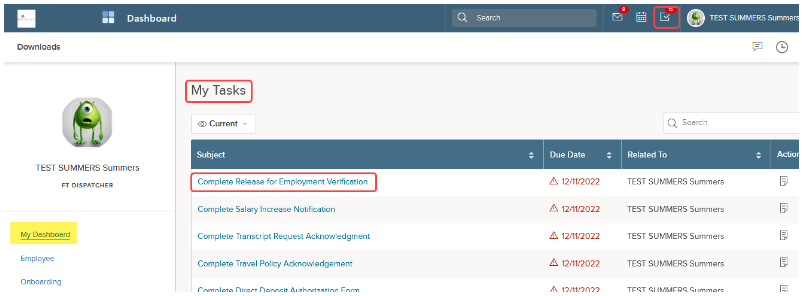
Calendar 

The calendar icon displays the tasks on their due dates. Employees can click an individual task to view information about it.



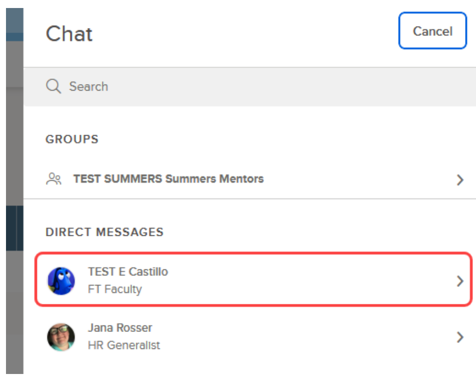
Tasks

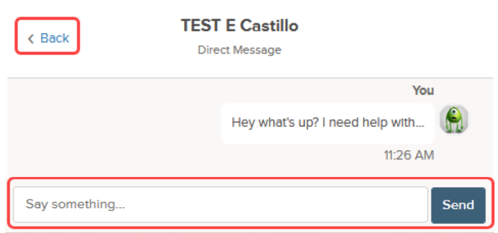
Selecting the task icon opens the My Tasks section on the My Dashboard link. Click a link to open and complete a task.



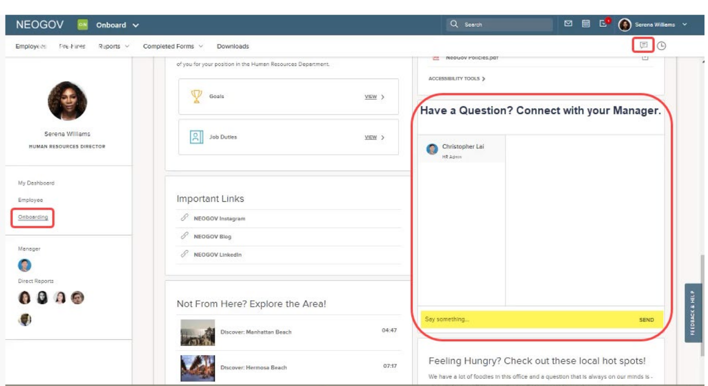
Chat

Clicking the chat icon allows you to initiate instant messages with your manager, direct report or applicable subgroups. Select the person you are trying to communicate with via chat. A direct message box will open. Type your message and hit send. If the person you are trying to communicate with is not currently in NEOED, he/she will receive an email letting them know you want to chat. To exit the chat box, click Back > Cancel.





The instant messages are also visible/accessible in the Chat section in the New Employee Onboarding Portal.



Manager Perspective

**** IMPORTANT: You will find general information about employee access to onboarding-related features in NEOED in the Employee Perspective section above. This section highlights additional elements available to managers. ****

As noted in the Employee Perspective section, there are two places employees/managers can access onboarding-related items in NEOED, the Unified Self-Service (USS) Dashboard (main home page) and by navigating to the Onboarding module's dashboard. All tasks can be accessed and viewed from the USS Dashboard. If authorized, employees and managers may be able to view additional information in the Onboarding Dashboard. The information provided below outlines onboarding features for managers.

Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)

The Unified Self-Service (USS) Dashboard is the home page employees and managers see when they first log into NEOED. If authorized, managers may see more navigation link options on the left (i.e., Dashboard, Tasks, People, Recruiting, Reports) than employees who are not in supervisor roles. Links will be limited to the access/permission assigned to each position.

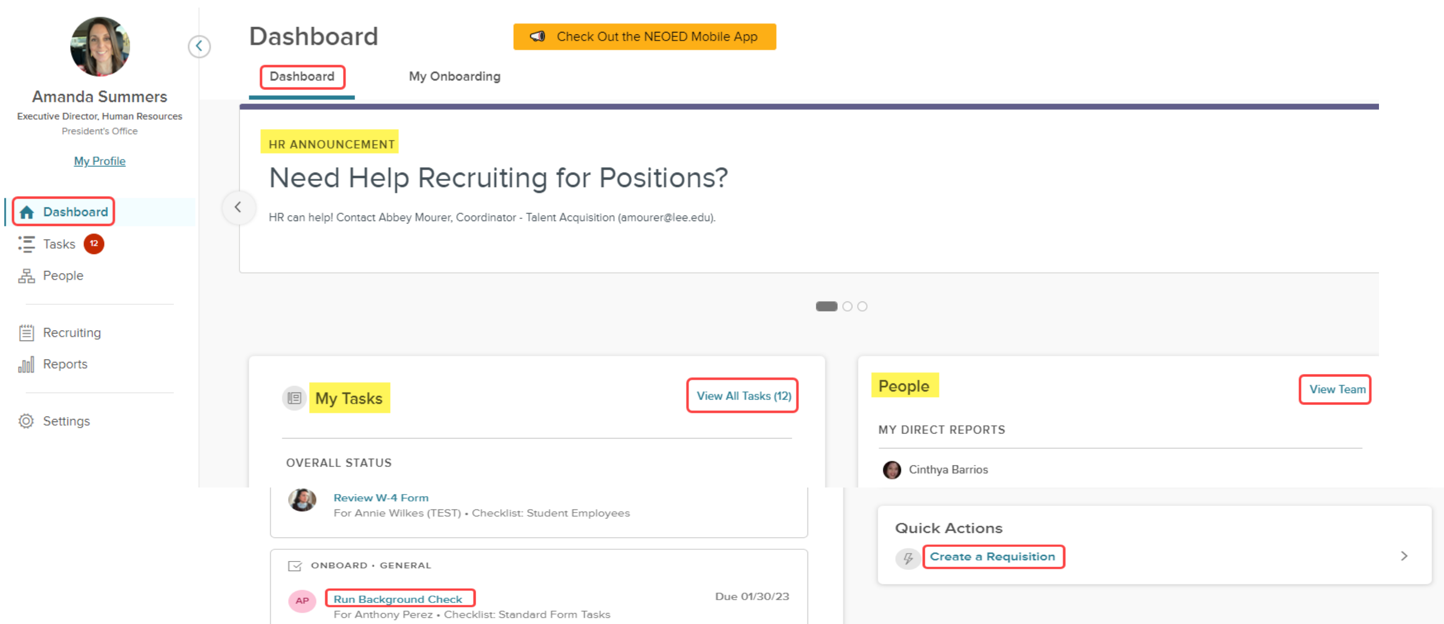
USS Dashboard Links

Dashboard Link

I. Dashboard Tab

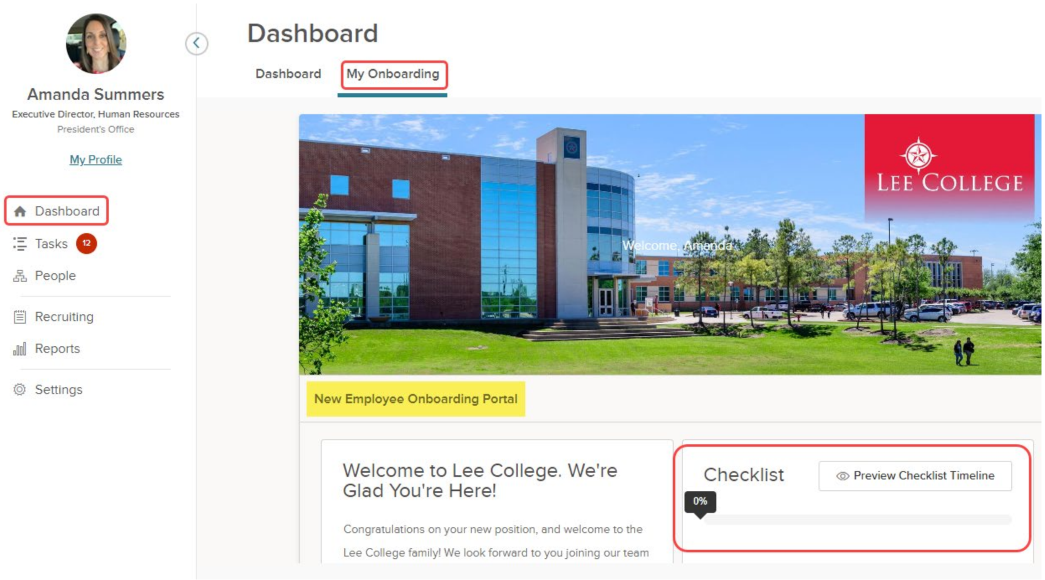
From the Dashboard link, under the Dashboard tab, managers may see the following shortcuts:

- HR Announcements
- My Tasks – Any action required/task assigned to you will be listed here. Click the appropriate action link to open and complete each task. Selecting View All Tasks will take you to the To Do tab on the Tasks link.
- People – A list of your direct reports will display in this section. Clicking an employee name opens the employee detail page under the People link. Selecting the View Team link takes you to the My Team tab under the People link.
- Quick Actions – If you have permission to request to fill a position, you will see a link to Create a Requisition. This link serves as a shortcut allowing you to quickly open and begin filling out the electronic requisition form.



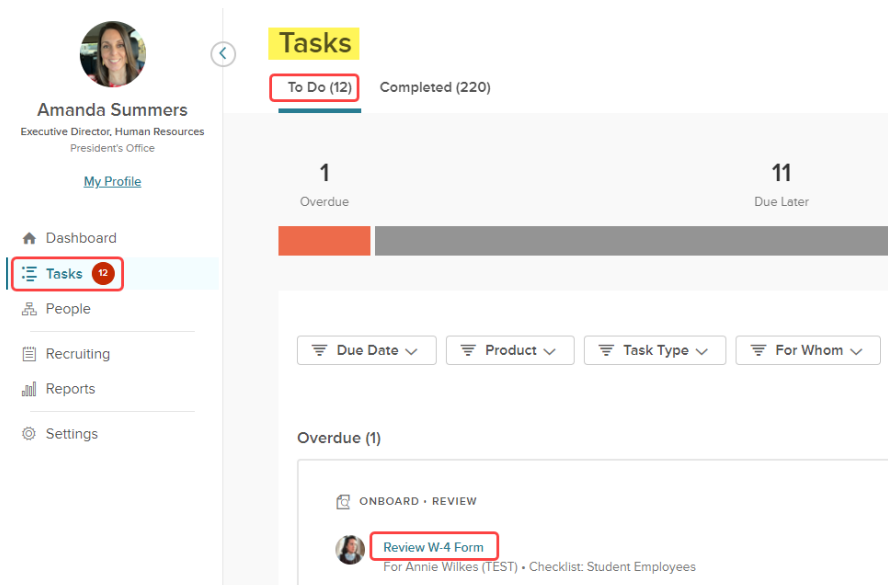
II. My Onboarding Tab

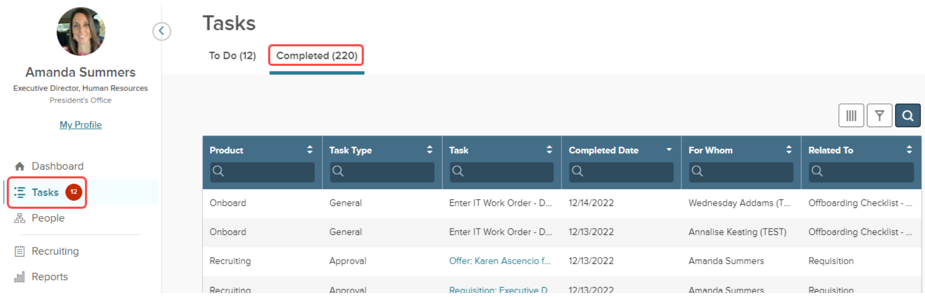
The My Onboarding tab displays the agency-wide portal (i.e., New Employee Onboarding Portal) and applicable sub-portals that may be assigned to you based on your position or department. This allows you to see the same information that was shared with new hires. However, unlike new employees, you will NOT see items in the checklist section of the portal. As the manager, any tasks you are assigned will appear in the My Tasks areas on the Dashboard and Tasks links. Tasks assigned to managers will NOT appear in the checklist section of the New Employee Onboarding Portal for managers.



Tasks Link

Similar to employees, managers can view open and completed tasks from the Tasks link. Actions you need to take are displayed under the To Do tab. Click the appropriate link to open a task. To see a list of completed tasks, select the Completed tab.





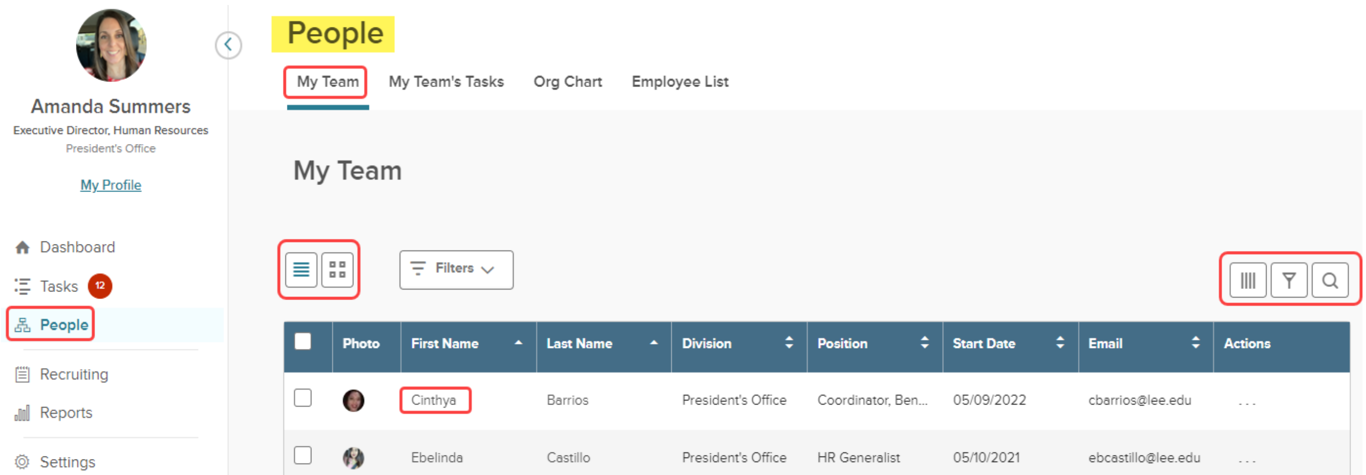
People Link

As a manager, you may have access to the People link. This allows you to see information about your direct reports.

I. My Team Tab

A list of your direct reports shows on this tab.

- Select an Employee – Click an employee name to open the employee's profile.
- Adjust View – Adjust the way your team is displayed by selecting the grid or card view option. (Grid view is shown in the screenshot below.)
- Search – Use the search icon to look up employees.
- Filter – Use the filter icon to open advanced filtering for the list.
- Adjust Columns – Use this icon to add additional items columns to the list.



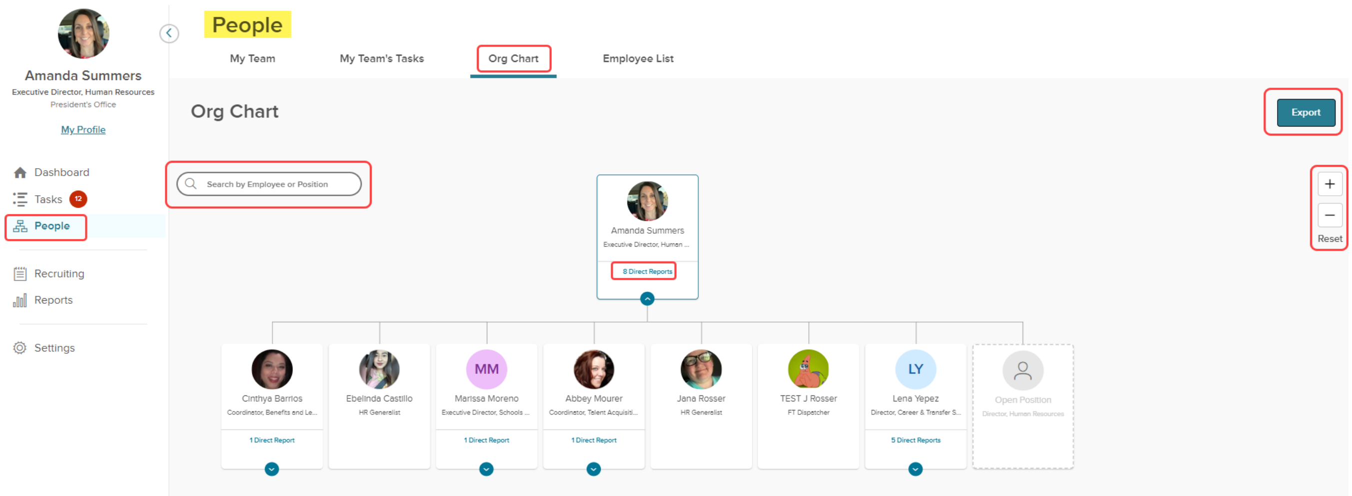
II. My Team's Tasks Tab

This tab allows you to view any tasks within the NEOED system (e.g., Onboarding, Recruiting – Approvals, Reviews, Recommendations) currently assigned to your direct reports. As the manager, you cannot take any action from this page. It simply provides a snapshot of current and late tasks assigned to your team members.

III. Org Chart Tab

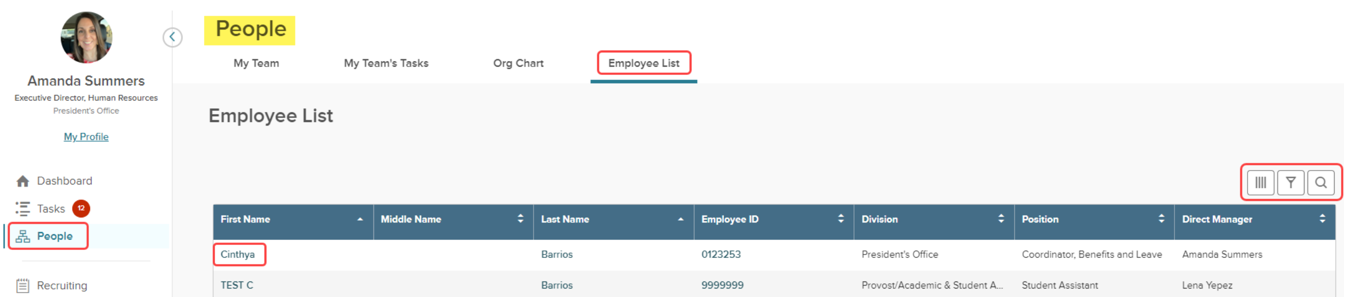
This tab displays an org chart for your area.

- Search – Use the search field to look up employees or positions.
- Export – Click Export to create a pdf of the chart. When exporting the chart, you will be given the option to export the current view or customize the export.
- Adjust Chart Size – Select + or – to reset the size of the chart on your screen.
- View Employee Information – If applicable, an employee box may include a message stating the # of direct reports associated with this team member (see example below). To view an employee's profile, click the employee's picture.



IV. Employee List Tab

This tab provides another way to view a list of your direct reports. You can use the search, filter and column icons on the right to quickly access employee information. Clicking on an employee name opens the employee profile page.

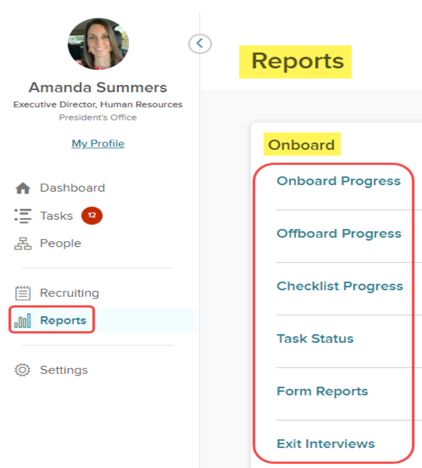


Recruiting Link

The recruiting link is visible to managers assigned access to the Online Hiring Center (OHC). Not all employees have access to the OHC module. Managers use this link to view tasks and information associated with requesting and approving positions, monitoring job postings, viewing applicants and recent hires, recommending candidates for hire, etc. For more information on the OHC module, please refer to HR's NEOED OHC User Guide.

Reports Link

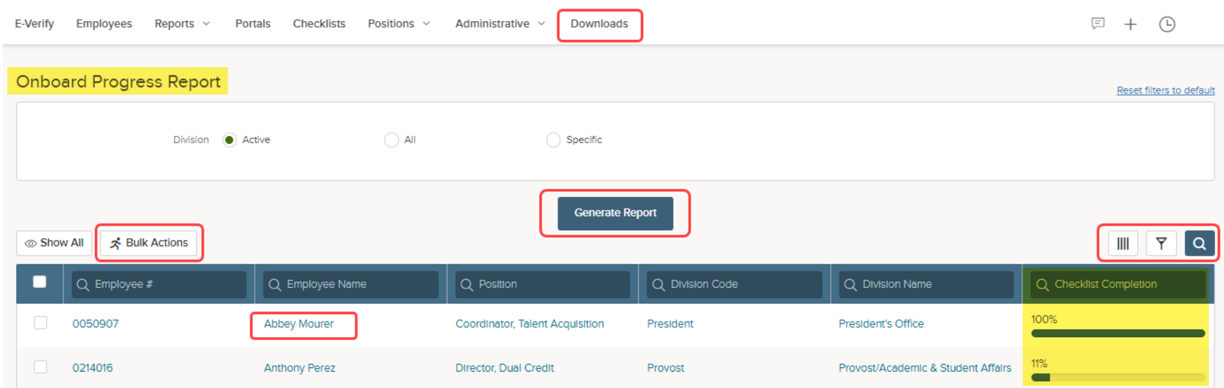
As a manager, you may have limited access to certain onboarding reports (i.e., Onboard Progress, Offboard Progress, Checklist Progress, Task Status, Form Reports and Exit Interviews) associated with your team members.



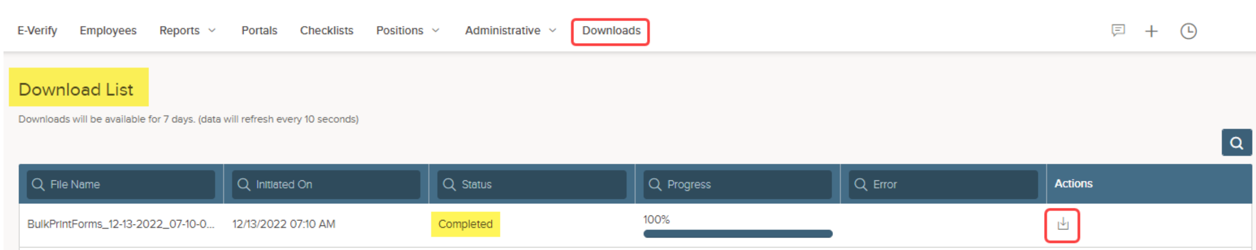
I. Onboard, Offboard and Checklist Progress

- **Onboard Progress Report** – See how your direct reports are progressing through the assigned new hire checklist(s)/tasks.
- **Offboard Progress Report** – See how your direct reports are progressing through the assigned exiting checklist(s)/tasks.
- **Checklist Progress Report** – View the checklist completion % for your direct reports.

The data provided on these three progress reports is similar. Each report lists the names of your team members and displays the progress he/she has made toward completing the assigned onboarding, offboarding or checklist tasks.



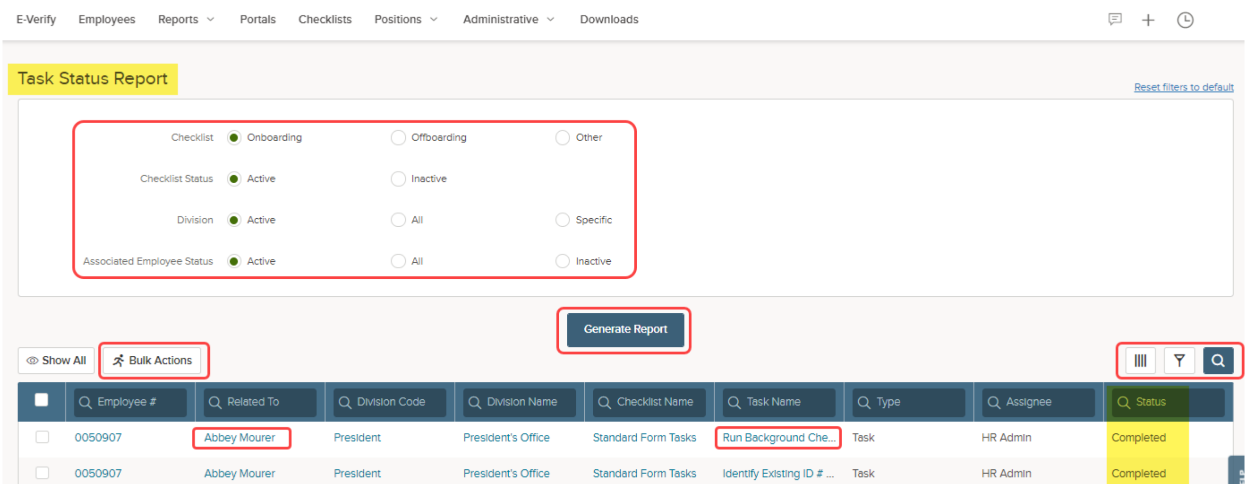
- Search and Filter Results – Use these icons on the right to quickly locate employees and/or information.
- Add Columns – Click the columns icon to add or remove columns from the data viewed on the screen.
- Generate Report – Click this button to create a report that includes the data for each individual currently displayed on the screen. It may take a few minutes to create the report. To view the completed report, click the Download link at the top of the page. This opens the Download List page. The Status column will let you know when your report is completed. Afterwards, click the download icon in the Actions column to access your report. **** IMPORTANT: Downloaded reports are only available for 7 days. **** If you do not access the information within this timeframe, you will need to rerun the report.



- Bulk Actions – To extract data for multiple employees, select the applicable employees > click Bulk Actions > choose the appropriate action (i.e., Export to CSV, Export to PDF or Export to Excel).

II. Task Status

Similarly, the Task Status report displays all tasks assigned to your direct reports. Various search options are available (e.g., select the checklist you want to view tasks for, do you want to view active or inactive checklists, etc.). The status of each task is displayed in the Status column. Clicking an employee name opens the Employee link on the Onboarding module. This page displays Employee Details, Tasks, Notes & Attachments and Forms. Clicking a task link opens the Task Information page. As described above, managers can also use the search, filter and column icons, Bulk Actions and Generate Report buttons for this report.



III. Form Reports

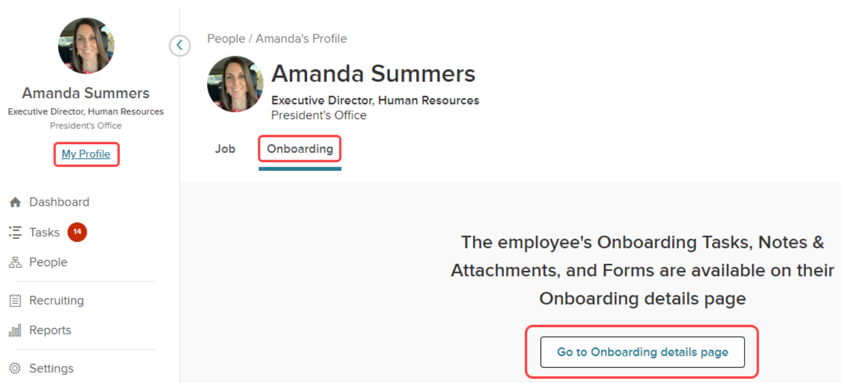
Managers may have permission to view certain forms associated to their direct reports.

IV. Exit Interviews

Managers may have permission to view exit questionnaires completed by their direct reports.

Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard

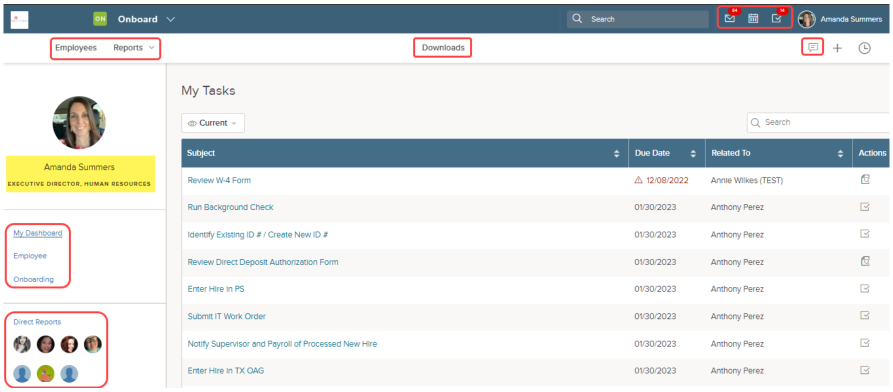
Follow these steps to navigate to the Onboarding Dashboard/module from the USS Dashboard: Click My Profile > Onboarding tab > Go to Onboarding details page.



Onboarding Module Dashboard

As described in the Employee Perspective, the following information will display in the navigation fields on the left: Your picture, name and position, links (i.e., My Dashboard, Employee and Onboarding), the name of your manager and the name(s) of your direct reports. On the navigation fields in the upper right corner of the page, you will see links to access your messages, calendar, tasks and chat.

Information about these items was previously covered in the Employee Perspective, Links – My Dashboard, Employee & Onboarding section. Please review this information to become familiar with their functions.



I. Links – My Dashboard, Employee & Onboarding
A description of these links/features is provided above in Manager Perspective, USS Dashboard Links sections provided above.

II. Direct Reports
Clicking on a direct report will open the employee's Onboarding Dashboard, allowing the manager to view the employee's Employee and Onboarding links.

III. Links – Employees, Reports & Downloads
Managers may also have access to the following links at the top of the Onboarding site: Employees, Reports and Downloads. Functions for each of these links were described in Manager Perspective, USS Dashboard Links sections provided above.

Questions/Assistance

If you have questions or need assistance, contact the Human Resources Office at hr@lee.edu or (281) 425-6875.