

Create HR Activities to send onboarding, certification, or training documents to employees

You may already know that TimeForge's Applicant Tracking and Onboarding system allows you to [upload onboarding documents](#) to an employee's profile. But did you know there's a way to assign HR documents to an entire company, location, or group of employees at the same time? Yup! By using HR Activities.

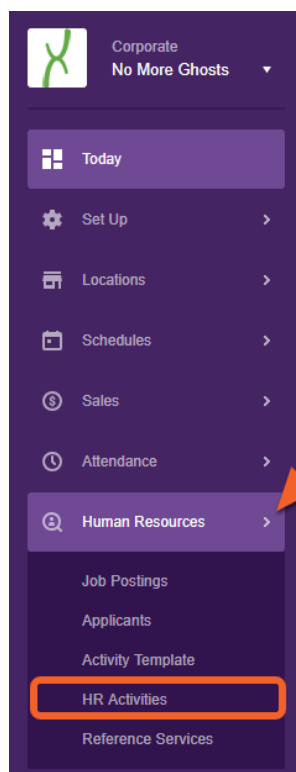
HR Activities can be applied to a variety of situations, based on the needs of your business. For example, you could use an HR Activity to collect benefits information for your entire company, to onboard a fresh group of new hires, or to assign training to a select group of employees (or all employees) at a specific location. With [HR Templates](#), you can streamline the process even further.

Just click on a link below to get started!

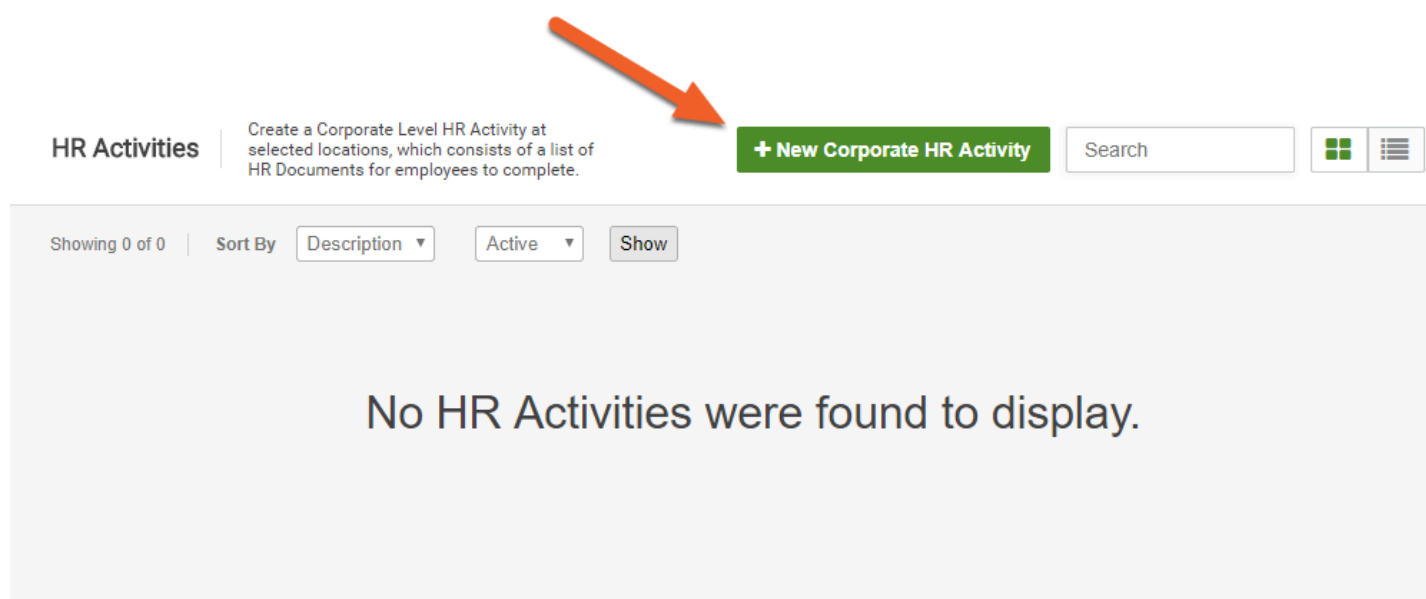
Company-wide and location-specific HR Activities

From the Corporate level, navigate to the HR Activities page

Make sure you're at the [Corporate level](#), then open the **Human Resources** tab and select **HR Activities** from the sub-menu.



Click on New Corporate HR Activity



Fill out the Activity Information form

Provide a **Description**, **Start Date**, and **End/Due Date**. You can also supply an optional email address (or multiple addresses) to notify HR or other personnel when the activities are completed.

Next, select the HR Documents you'd like to attach (these are defined under [HR Types](#)).

💡 In the future, you can streamline this step by [applying a template](#)! Activity Templates allow you to re-use a set of documents. You can even [create a template from an existing HR Activity](#).

Activity Information

Activity

Locations

Description *

New Hire Onboarding Packet ?

Start Date *

06/25/2018

End/Due Date *

06/29/2018

When an employee completes this activity, attach the HR Documents to an email and send to the following address(es):

espengler@nomoreghosts.com

?

Apply a Template

--Choose--

Apply

HR Documents

HR Documents	
⬆ ⬇ ⬆	Nuclear Accelerator License
⬆ ⬇ ⬆	Direct Deposit Form
⬆ ⬇ ⬆	Employee Handbook Acknowledgement
	--Choose--

Save


Cancel

💡 You can rearrange the documents in the list using the green arrows at the beginning of each row. This might be useful if you'd like employees to complete each part of the activity in a particular order.

Select the Locations tab to assign the activity

Once you've filled out the Activity form and chosen your documents, it's time to assign the activity to one, multiple, or all locations in your company. Open up the **Locations** tab:

Activity Information



Activity **Locations**

Description * Start Date * End/Due Date *

New Hire Onboarding Packet ? 06/25/2018 06/29/2018

When an employee completes this activity, attach the HR Documents to an email and send to the following address(es):

espengler@nomoreghosts.com ?

Then, select your desired locations. Keep in mind that all employees at these locations will receive the documents and will be required to complete the activity!

Activity Information

Activity **Locations**

Locations

This activity will be applied to all employees at the following selected locations.

☐ All Locations

☒ Jersey Office ☐ Learning Center ☒ Manhattan Main Office

☐ Manhattan Office 2 ☐ Manhattan Office 3 ☐ No More Ghosts HQ

☐ Queens Office ☐ Research Center West ☐ University Office

Save **Cancel**

Click Save to save your new HR Activity

Activity Information

Activity

Locations

Locations

This activity will be applied to all employees at the following selected locations.

☐ All Locations

☒ Jersey Office
 ☐ Learning Center
 ☒ Manhattan Main Office

☐ Manhattan Office 2
 ☐ Manhattan Office 3
 ☐ No More Ghosts HQ

☐ Queens Office
 ☐ Research Center West
 ☐ University Office

Save

Cancel

Your new activity will now appear in the HR Activities list!

HR Activities

Create a Corporate Level HR Activity at selected locations, which consists of a list of HR Documents for employees to complete.

+ New Corporate HR Activity

Search

Showing 1 of 1

Sort By

Description

Active

Show

New Hire Onboarding Packet

Edit

End/Due Date

06/29/2018

Status

Active

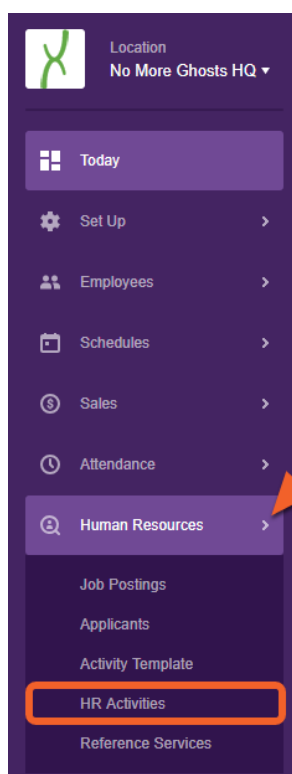
Make Template

last edit: Jun 25, 2018 - 4:33 PM

HR Activities for a group of employees at a specific location

From the Location level, navigate to the HR Activities page

Make sure you're at the [Location level](#), then open the **Human Resources** tab and select **HR Activities** from the sub-menu.



Click on New Location HR Activity

⚠ To edit Corporate Level HR Activities, please go to the Corporate Level.

HR Activities

Create a Location Level HR Activity, which consist of a list of HR Documents for employees at this location to complete.

+ New Location HR Activity Search

Showing 1 of 1 | Sort By Description | Active | Show

New Hire Onboarding Packet		Edit
End/Due Date	Status	
06/29/2018	Active	
Level		
Corporate		
last edit: Jun 25, 2018 - 4:33 PM		

A screenshot of the TimeForge web interface. At the top, a dark banner contains a warning: '⚠ To edit Corporate Level HR Activities, please go to the Corporate Level.' Below this is the 'HR Activities' section. It includes a heading 'HR Activities' and a description: 'Create a Location Level HR Activity, which consist of a list of HR Documents for employees at this location to complete.' To the right of the description is a green button labeled '+ New Location HR Activity' and a search bar. Below the description, there are filters: 'Showing 1 of 1', 'Sort By Description', 'Active', and a 'Show' button. A table displays one activity: 'New Hire Onboarding Packet'. The table has columns for 'End/Due Date' (06/29/2018), 'Status' (Active), and 'Level' (Corporate). At the bottom of the table, it says 'last edit: Jun 25, 2018 - 4:33 PM'. An orange arrow points to the '+ New Location HR Activity' button.

💡 You can view the details of a Corporate activity that applies to your selected location, but you cannot modify the recipients or details of that activity from the location level.

Fill out the Activity Information form

Provide a **Description**, **Start Date**, and **End/Due Date**. You can also supply an optional email address (or multiple addresses) to notify HR or other personnel when the activities are completed.

Next, select the HR Documents you'd like to attach (these are defined under [HR Types](#)).

💡 In the future, you can streamline this step by [applying a template](#)! Activity Templates allow you to re-use a set of documents. You can even [create a template from an existing HR Activity](#).

Activity Information

The screenshot shows the 'Activity Information' form. At the top, there are two tabs: 'Activity' (selected) and 'Employees'. The form contains the following fields and sections:

- Description ***: A text input field containing 'Annual Training'.
- Start Date ***: A date picker field showing '06/25/2018'.
- End/Due Date ***: A date picker field showing '06/29/2018'.
- Email Address**: A text input field with the placeholder 'When an employee completes this activity, attach the HR Documents to an email and send to the following address(es):'. The field contains 'espengler@nomoreghosts.com'.
- Apply a Template**: A dropdown menu showing '--Choose--' and an 'Apply' button.
- HR Documents**: A section containing a table of selected documents.

HR Documents		
⬆	Annual Training	✖
⬆	Certification	✖
	--Choose--	

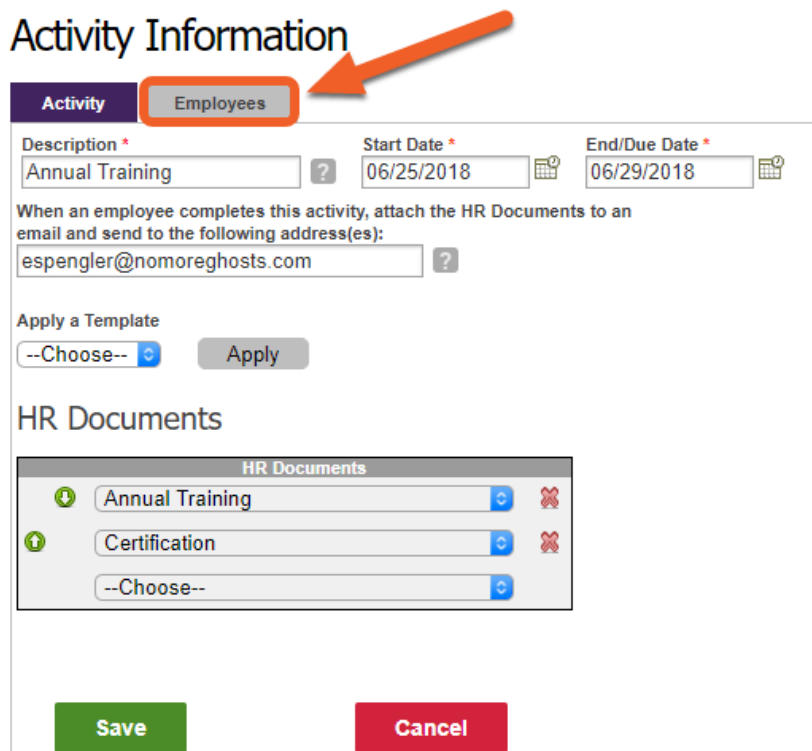
At the bottom of the form are two buttons: 'Save' (green) and 'Cancel' (red).

💡 You can rearrange the documents in the list using the green arrows at the beginning of each row. This might be useful if you'd like employees to complete each part of the activity in a particular order.

Select the Employees tab to assign the activity

Once you've filled out the Activity form and chosen your documents, it's time to assign the activity to one, multiple, or all employees at the selected location. Open up the **Employees** tab:

Activity Information



The screenshot shows a web form titled "Activity Information". At the top, there are two tabs: "Activity" and "Employees". The "Employees" tab is selected and highlighted with an orange box, and an orange arrow points to it from the top right. Below the tabs, the form contains several fields: "Description *" with the value "Annual Training", "Start Date *" with the value "06/25/2018", and "End/Due Date *" with the value "06/29/2018". Below these fields is a text area for email addresses with the value "espengler@nomoreghosts.com". There is a section for "Apply a Template" with a dropdown menu set to "--Choose--" and an "Apply" button. Below this is a section titled "HR Documents" which contains a table with three rows: "Annual Training", "Certification", and "--Choose--". Each row has a green plus icon on the left and a red X icon on the right. At the bottom of the form are two buttons: "Save" (green) and "Cancel" (red).

Activity

Employees

Description * Annual Training ?

Start Date * 06/25/2018

End/Due Date * 06/29/2018

When an employee completes this activity, attach the HR Documents to an email and send to the following address(es):

espengler@nomoreghosts.com ?

Apply a Template

--Choose-- Apply

HR Documents

HR Documents		
+	Annual Training	X
+	Certification	X
	--Choose--	

Save Cancel

Then, select the recipients from the list! Simply hover over a line item and click the green plus sign to move the selected employee(s) over to the recipients column.

You can select All Managers, All Supervisors, or All Employees at a time. Or, you can select all employees assigned to a specific Position or Department. Scroll all the way down to select individual employees by name, or (if you have a long list of employees) use the search filter at the top of the list.

For this example, let's check the box to select All Staff Members at this location:

Activity Information

Activity Employees

Employees

Select the employees who will be assigned to this activity.

☒ All Staff Members

Type here to search

- All Managers
- All Supervisors
- All Employees
- Positions---
- Administrative Assistant
- EPA Consultant
- Exterminator Team Lead
- Field Technician
- Ghost Grabber
- HR Director
- Legal Consultant
- Office Assistant
- Paranormal Researcher
- Senior Ghost Grabber
- Senior Spectre Exterminator
- Spectre Exterminator
- Supernatural Expert

Recipients:

- Beka Valentine
- Dylan Hunt
- Louis Tully
- Trance Gemini
- Walter Peck
- Winston Zeddemore

[Clear List](#)

Save **Cancel**

Click Save to save your new HR Activity

Activity Information

Activity Employees

Employees

Select the employees who will be assigned to this activity.

☒ All Staff Members

Type here to search

- All Managers
- All Supervisors
- All Employees
- Positions---
- Administrative Assistant
- EPA Consultant
- Exterminator Team Lead
- Field Technician
- Ghost Grabber
- HR Director
- Legal Consultant
- Office Assistant
- Paranormal Researcher
- Senior Ghost Grabber
- Senior Spectre Exterminator
- Spectre Exterminator
- Supernatural Expert

Recipients:

- Beka Valentine
- Dylan Hunt
- Louis Tully
- Trance Gemini
- Walter Peck
- Winston Zeddemore

[Clear List](#)

Save **Cancel**



Your new activity will now appear in the HR Activities list! The activity will also appear on the [employee-level Activities page](#) for each employee you added.

HR Activities

Create a Location Level HR Activity, which consist of a list of HR Documents for employees at this location to complete.

+ New Location HR Activity

Search



Showing 2 of 2 | Sort By Description ▾ Active ▾ Show

Annual Training

Edit

End/Due Date	Status
06/29/2018	Active

Level

Location

Make Template

last edit: Jun 25, 2018 - 4:52 PM

✕

New Hire Onboarding Packet

Edit

End/Due Date	Status
06/29/2018	Active

Level

Corporate

last edit: Jun 25, 2018 - 4:33 PM

Once you've added activities for your employees, [follow these steps](#) to track individual employees' progress or to view their activities at the employee level.

Related Topics

- [Add a new HR Type](#)
- [Create an HR Activity Template](#)
- [Send multiple documents to a single employee](#)