

## Quick Start Guide

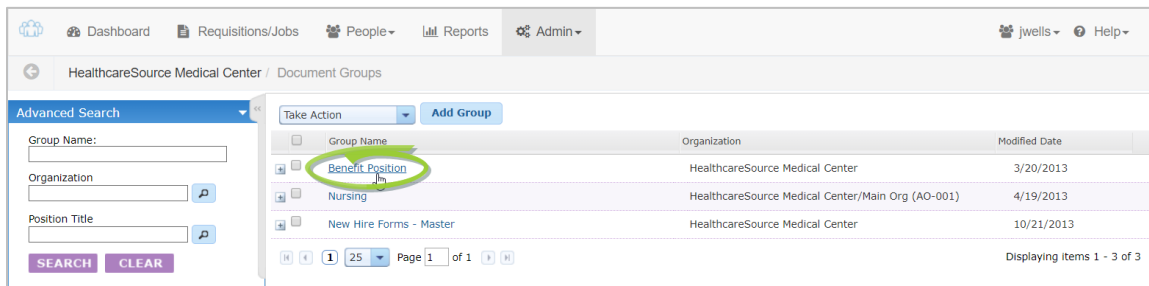
# Updating Onboarding Document Groups

Every now and then, you'll need to update the onboarding documents distributed to employees. Annual tax forms, company policies, insurance and benefit documents, and other types of forms all require a refresh every now and then. By following the steps in this guide, you'll be able to post those important revisions as quickly as possible.

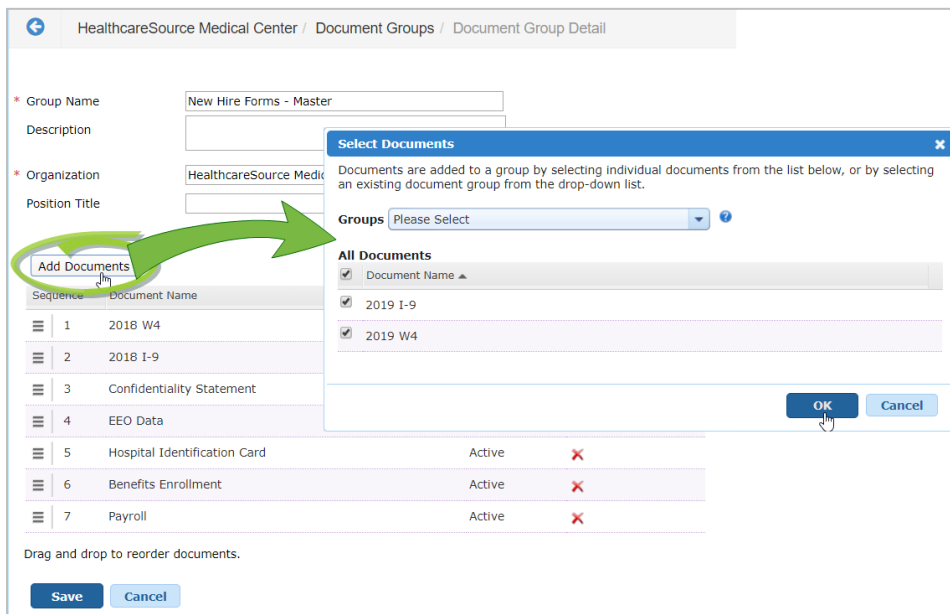
## Adding Documents to Existing Groups

Updating your document groups in symplr Recruiting is a short process which allows you to manage your onboarding documents. You can create and delete groups as needed, as well as add, remove and re-organize documents. Begin this process from the *Document Groups* page, located in the **Admin** menu. Your existing groups are listed here in a table.

1. Selecting the document group you want to update displays the *Document Group Detail* page, where you can add, remove, and re-organize documents for the group.



2. Selecting **Add Documents** displays a modal window listing any available documents.



3. Check the box next to any documents you wish to add, then select **OK**. The modal closes, and the documents you've chosen now display in the list with the rest of the group.

HealthcareSource Medical Center / Document Groups / Document Group Detail

\* Group Name: New Hire Forms - Master  
Description:   
\* Organization: HealthcareSource Medical Center  
Position Title:

Add Documents

Sequence	Document Name	State	Remove Document
1	2018 W4	Inactive	X
2	2018 I-9	Inactive	X
3	Confidentiality Statement	Active	X
4	EEO Data	Active	X
5	Hospital Identification Card	Active	X
6	Benefits Enrollment	Active	X
7	Payroll	Active	X
8	2019 I-9	Active	X
9	2019 W4	Active	X

Drag and drop to reorder documents.

Save Cancel

4. Your documents are listed *here*, but they won't appear as part of the document group until you **Save** your changes using the button below the table. After successfully saving, a "Success!" message displays at the top of the page. Now when this group is assigned, these new documents are included as part of it.

This process can be repeated from this page for all document groups needing updates.

## Removing Documents from a Group

As you are updating your document groups, you'll likely notice documents that are outdated and no longer needed. Removing a document from a group is carried out from the *Document Group Detail* page.

Locate the document you want to remove. Selecting the red **X** icon in its *Remove Document* column deletes it from the group.

After you're finished, don't forget to **Save** your changes before exiting!

HealthcareSource Medical Center / Document Groups / Document Group Detail

\* Group Name: New Hire Forms - Master  
Description:   
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Position Title:

Add Documents

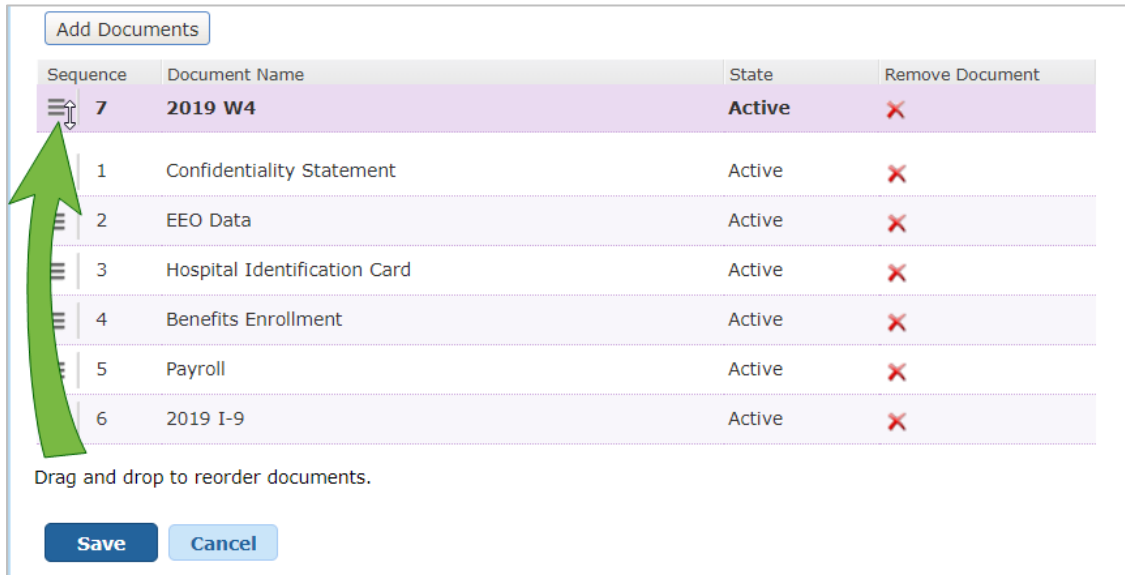
Sequence	Document Name	State	Remove Document
1	2018 W4	Inactive	X
2	2018 I-9	Inactive	X
3	Confidentiality Statement	Active	X

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## Reordering Documents in a Group

Updating the order of documents within a group is an easy drag-and-drop process handled on the *Document Group Detail* page.

1. Find the document you want to re-position. Click and hold on the **hamburger** icon (the three horizontal lines).



The screenshot shows a modal window titled "Add Documents" containing a table of documents. A green arrow points to the hamburger icon (three horizontal lines) in the first column of the table, which is used for reordering. The table has four columns: Sequence, Document Name, State, and Remove Document. The first row is highlighted in purple and shows a sequence of 7 for the document "2019 W4". Below the table, there is a text prompt "Drag and drop to reorder documents." and two buttons: "Save" and "Cancel".

Sequence	Document Name	State	Remove Document
7	2019 W4	Active	✗
1	Confidentiality Statement	Active	✗
2	EEO Data	Active	✗
3	Hospital Identification Card	Active	✗
4	Benefits Enrollment	Active	✗
5	Payroll	Active	✗
6	2019 I-9	Active	✗

Drag and drop to reorder documents.

**Save** **Cancel**

2. Drag the document to the desired spot in the lineup and release. The sequence automatically re-numbers to match your new order. You can change the order to any way you need.
3. Clicking **Save** keeps the document group in your new arrangement for any future assignments.