NEOGOV

Unified Self Service
Employee/Manager User

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Overview

NEOGOV's Unified Self Service centralizes Employee and Manager tasks and actions across our talent management suite (TMS). This updated, revitalized self-service portal allows managers and employees to access information and tasks across Insight/OHC, Onboard, Perform, Learn, and E- Forms all from one central page.

Who is Unified Self Service for?

Currently, the Unified Self Service is available for users with the Employee and Manager user roles.

Insight Admins, Insight Users, HR Liaisons, HR Admins, HR Users, and IT Users will continue to use the NEOGOV suite by switching between products and performing their administrative duties in each appropriate product.

Main Self Service Dashboard

Upon logging in with your NEOGOV account, you will see your Dashboard. This is a single central hub for you to manage tasks, see your direct reports, and update your personal details.

Your Dashboard is made up of widgets that organize information and actions for your staff. These widgets allow you to take action right from this page, and include important metrics, filters and key information so you can focus on the highest priority tasks.

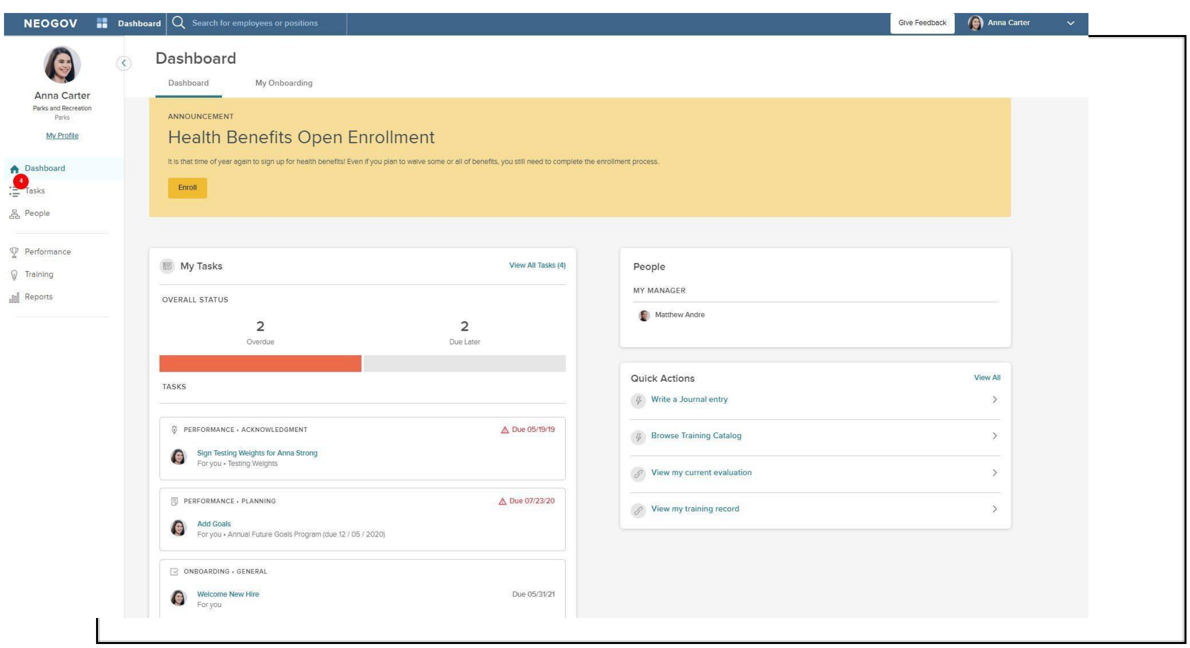

Figure 1: Main Dashboard Tab

Announcements

At the top of your Dashboard, a banner will appear with company **Announcements**.

Announcements help you keep up to date on key news, events, and actions within your agency.

My Tasks

Tasks across all TMS products are accessible in the Tasks widget. This means that instead of switching products to see various tasks, you can see all types of tasks in one spot. Your Dashboard displays your first five upcoming tasks with the earliest due dates. You can use quick filters to get instant visibility on tasks that are Overdue, Due This Week, and Due Later. To see more than the five earliest tasks, the Tasks page in the left side navigation shows a complete listing of the user's tasks across OHC, Onboard, Perform, Learn, and eForms.

People

The **People** widget allows you to view your manager and any direct reports. For each direct report, there will also be a message to show how many overdue tasks that person has assigned with a link to a list of the relevant tasks. There is also a link to take the user to the **My Team** page where you can take action on their direct reports. The My Team page is described in more detail in the My Team section below.

Quick Actions

Based on which NEOGOV products your organization has, you'll see a predefined list of **Quick Actions**. For example, you might see quick actions browse the training catalog, write a journal entry, or create a requisition.

My Onboarding

If your organization uses the Onboard product, you will also see a My Onboarding tab on your Dashboard. This tab will take you to your Onboarding Portal.

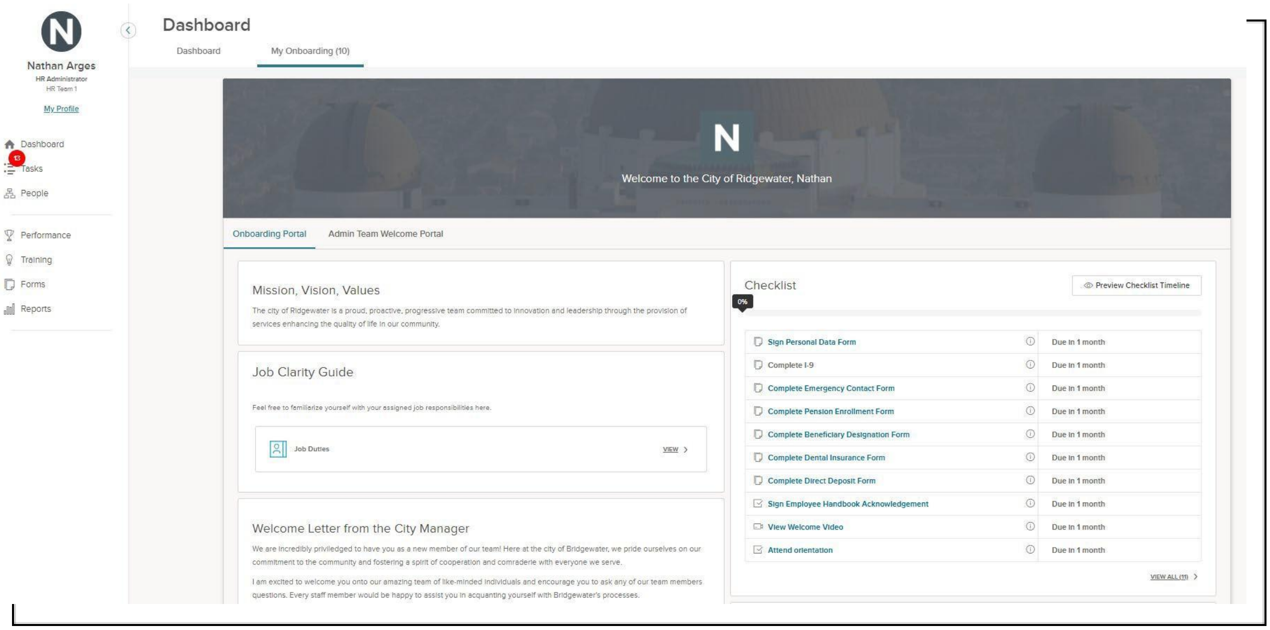

Figure 2: My Onboarding Tab

During Onboarding, your default page will be the My Onboarding Tab. Once Onboarding is complete, or if you are an active employee, your default view is the Dashboard Tab. You are able to return to your My Onboarding tab at any time to review your onboarding links, documents, and tasks.

Side Menu

On the left side of your Self Service page, you will see a side navigation menu. This menu includes quick links to specific pages for product and user role specific actions. The options you will see here will vary based on your user role and the products that your organization uses.

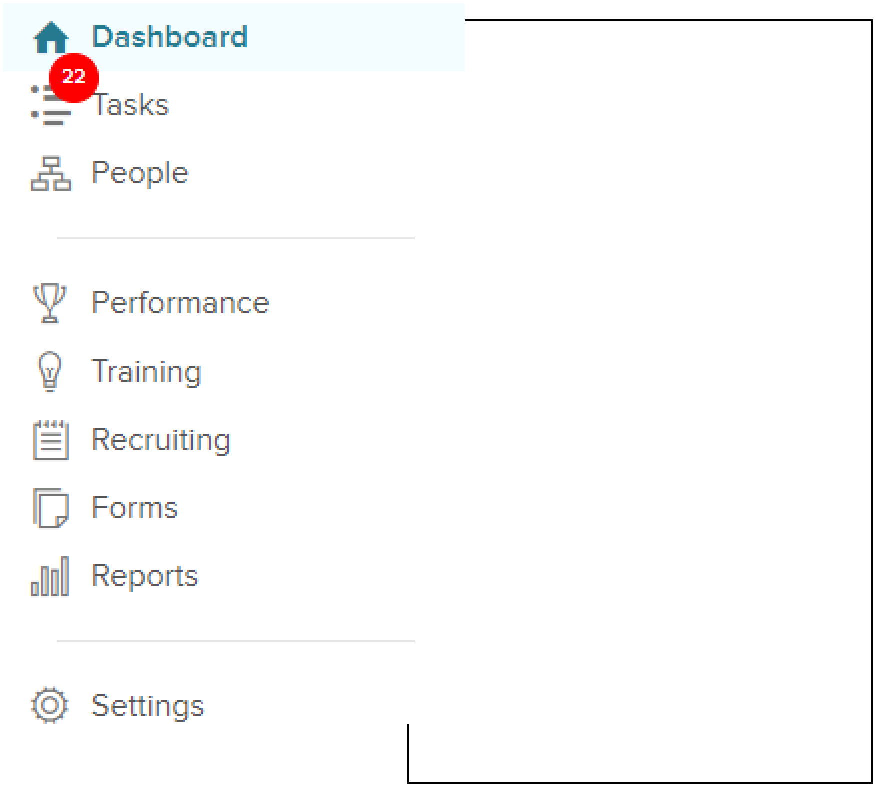

Figure 3: Side Menu

Selecting one of the Side Menu options will open the chosen page. The Side Navigation menu will still be available from each of these pages for easy navigation between different work processes. You can also choose to minimize the menu using the arrow icon near the top. Even when minimized, you will still be able to select the page options using the icons. You can expand the menu by selecting the arrow at the top again.

Tasks

The **Tasks** page allows users to see all of your NEOGOV product tasks in one place. You have tabs for both **To Do** and **Completed Tasks** with quick metrics and task due dates on each.

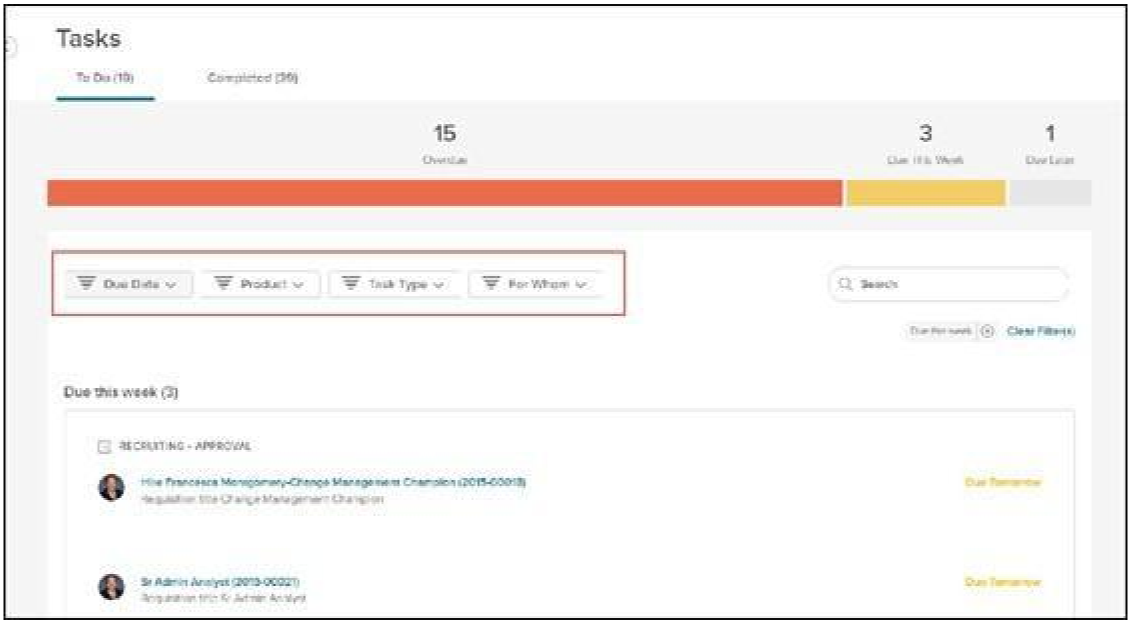

Figure 4: Filtering Options on Tasks Page

You are able to search for specific tasks, or filter the tasks assigned to you by Due Date, Product, Task Type, or For Whom.

You can take action on tasks directly from this page. Simply select the name of the task and the system will take you to the task.

People

The **People** page gives you visibility on the other employees and managers within your hierarchy. If you don't have any direct reports, you will only see this page if your organization uses the **Org Chart** described below.

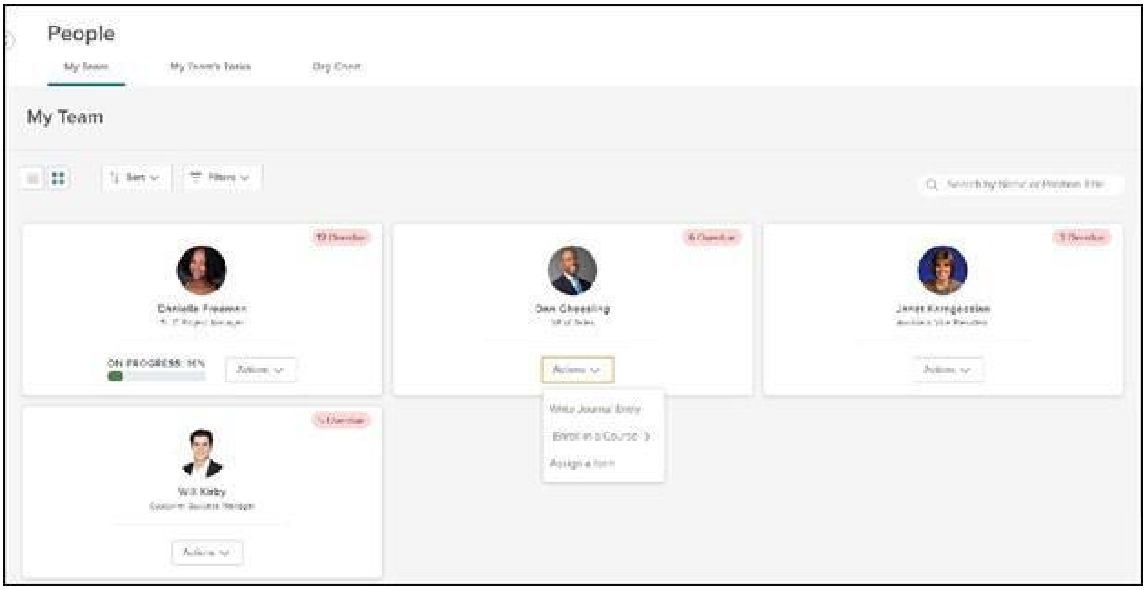

Figure 5: Action Options on People Page

If you are a manager, you will see three tabs here to help you manage your direct reports: **My Team, My Team's Tasks**, and **Org Chart.**

On the **My Team** tab, you can view your direct reports to see any overdue tasks each team member may have. The **Actions** dropdown on each employee card provides an easy way for you to create a journal entry, enroll the direct report in training, and/or assign a form. The options here may vary depending on what products your organization uses.

On the **My Team's** Tasks tab, managers can view tasks assigned to members of their team and have more oversight over what their team needs to do.

If your organization uses Perform, your users will also have access to the **Org Chart** tab.

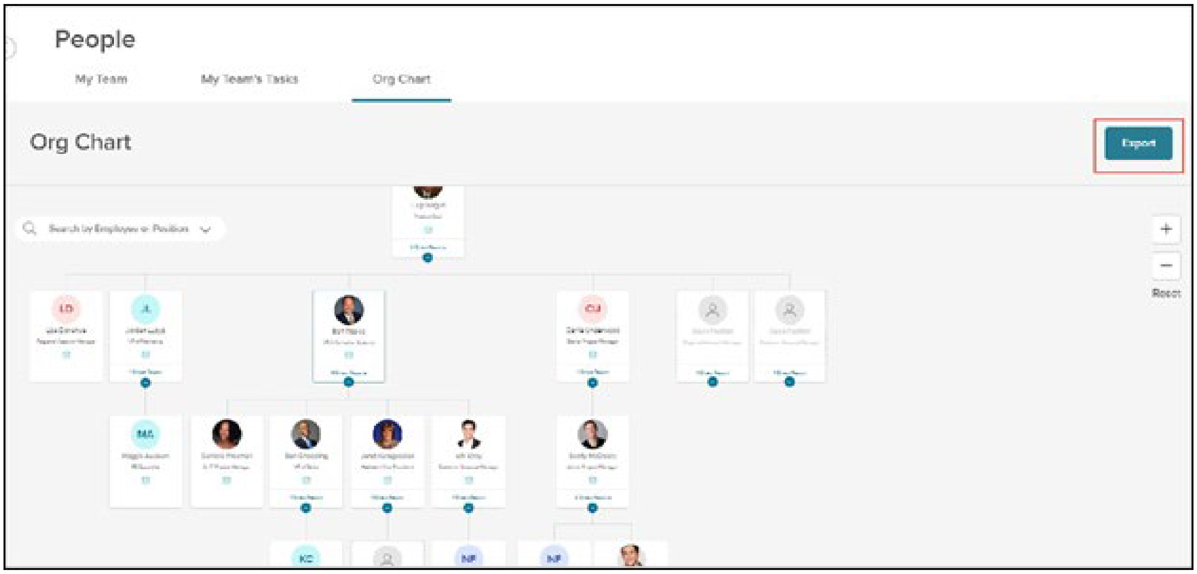

Figure 6: Exporting the Org Chart

This page includes an interactive organization chart where you can see the relationships between employees at your organization, including employee titles and information on your direct reports.

You can use the triangle toggles above and beneath the cards to drill down on the chart to see the connections between staff at your organization. From the organization chart, you can send an email directly from the employee card or select your own name to be taken to your Employee Profile.

This Org Chart can be exported and printed if needed.

Performance

If your organization uses the NEOGOV Perform product, you'll see the **Performance** page. This page shows all information related to performance evaluations including your own evaluations, your team's evaluations, and the journal hub.

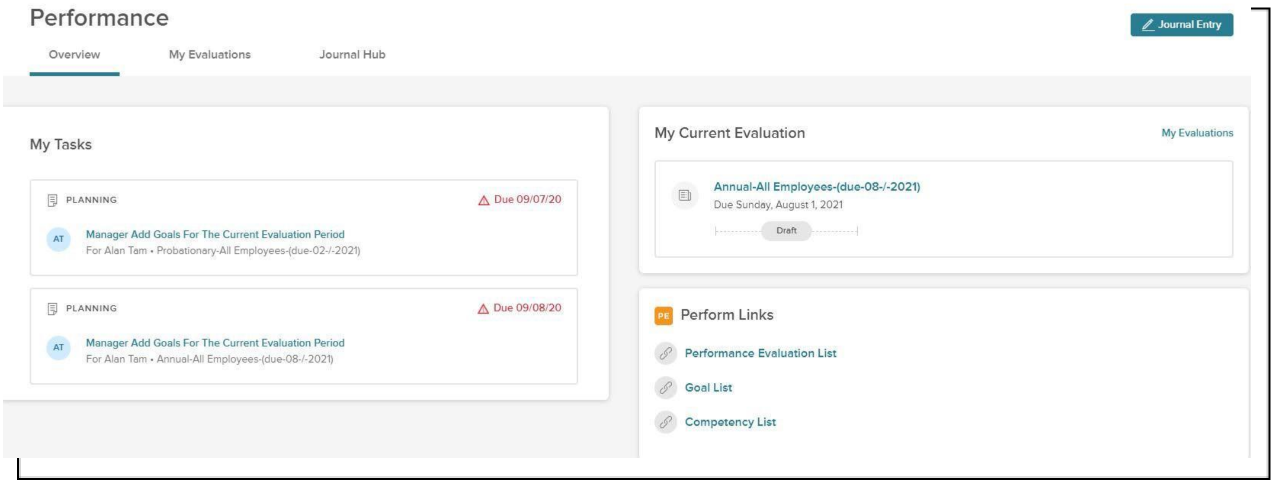

Figure 7: Performance Page

You can add a Journal Entry directly from any of the Performance page tabs.

From the **Overview** tab, you can see your Performance Review related tasks, and your current Performance evaluation.

The **My Evaluations** tab allows you to see your current and past evaluations. You can filter your evaluation list between Active, Completed, Archived, or Canceled evaluations.

The **Journal Hub** allows you to see all of your journal entries, including Current, Pending, and Draft entries. This page allows you to see at a glance who an entry is about, who created it and when, and if the entry has been shared or is private. Select the **View More** button to read the full content of any journal entry.

Training

If your organization uses the NEOGOV Learn product, you'll see the **Training** page. This page shows all your training information including your courses, available courses on the course catalog, and your training activity report.

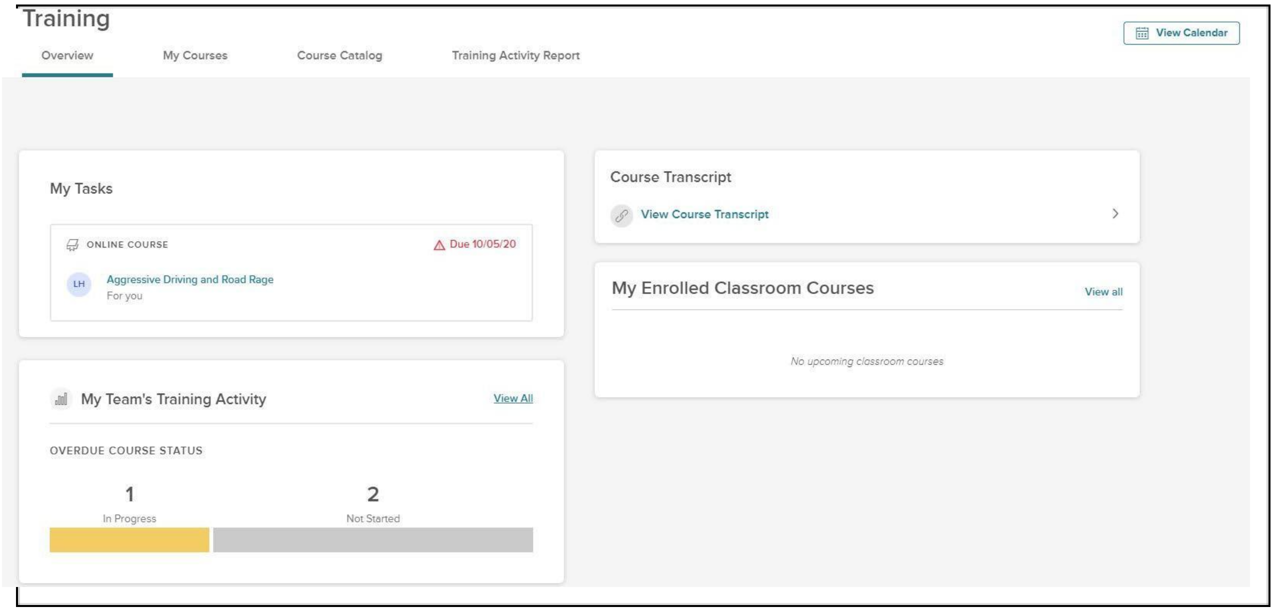

Figure 8: Training Page

You can **View** the Learn Calendar from any of the Training tabs.

The **Overview** tab allows you to see your training related tasks, upcoming classroom courses, and access your Course Transcript. If you are a manager, you will also see a widget detailing your team's training activity. This shows you at a glance if your direct reports have overdue or incomplete courses.

You can view your past and current enrollments on the **My Courses** tab. This page lists vital information on your Learning Plans and Courses, including the type of course, its completion status, and whether it is an online or classroom course. You can toggle this list between card and list view, or filter and search the list to see specific enrollments. You can select the individual courses to see more details about the course, review course materials, or take course surveys.

The **Course Catalog** tab is where you can view and enroll in available courses. This page can be searched or filtered by topic, course type, duration, or category.

The **Training Activity Report** tab gives you detailed metrics and reporting on your Course and Learning Plan activity. Interactive charts allow you to quickly drill down on you progress to see Overdue or Pending class information. This lets you know right away where to focus your time in completing your workplace learning.

Recruiting

If your organization uses the NEOGOV Insight product, you'll see the **Recruiting** page. This page shows all information related to recruitments you are involved in including requisitions, job postings, interviews, and hires. If you don't participate in hiring processes, you will not have the Recruiting page available.

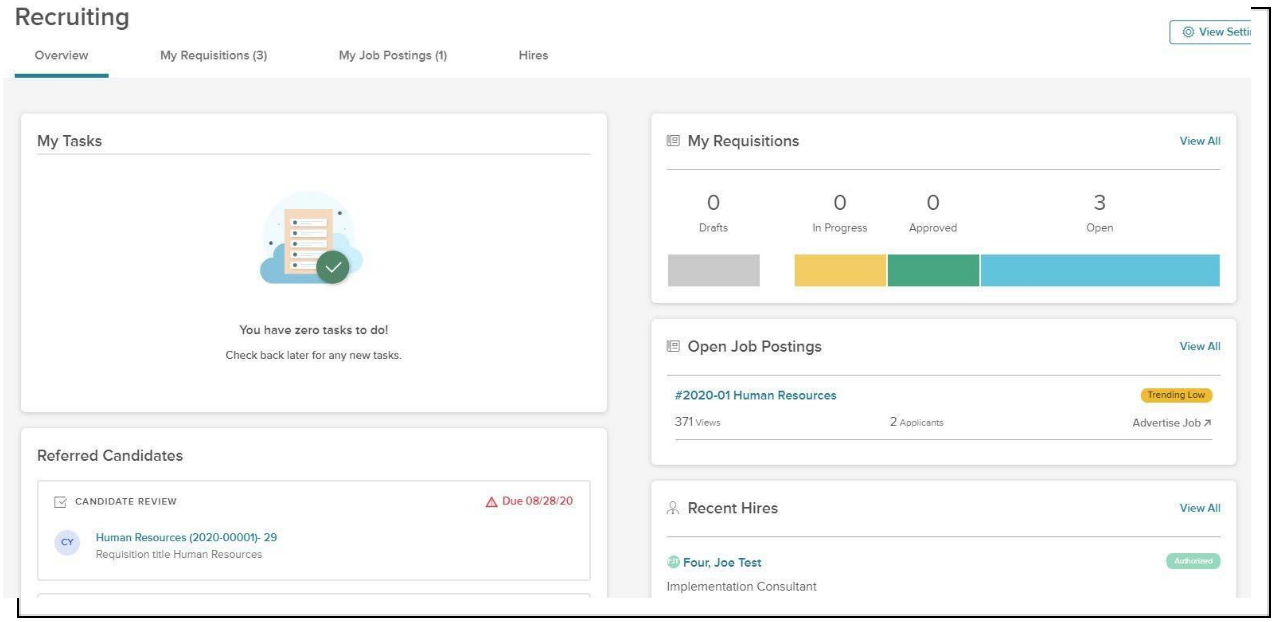

Figure 9: Recruiting Page

You can adjust the **View Settings** from any tab in the Recruiting page.

On the **Overview** tab, you can view your Tasks, Referred Candidates or Recent Hires, Open Job Postings, and interactive metrics. The widgets visible on this page will vary depending on your role and responsibility in hiring. You can click directly on the name of your task, requisition, or hire to open up additional information and actionable steps.

On the **My Requisitions** tab, you can see any requisitions where you are a hiring manager and the requisition status is Draft, In Progress, Approved, or Open. You can click on the name of the requisition to go to it to perform whatever actions are needed. On this tab you can also filter the requisition list, create a requisition, or click to view all requisitions you have access to.

On the **My Job Postings** tab, you can see all open job postings that you have permissions to see. From this page, you may be able to boost jobs if that is part of your hiring role.

On the **Hires** tab, users will see a list of all hires you are involved in and be able to filter them based on status: Pending Release, Approval In Progress, Awaiting Authorization, or Authorized. You can click the **hire's name** to go to OHC and see more detail about the hire.

Forms

If your organization uses the NEOGOV eForms product, you'll see the **Forms** page. This page shows all your eForms related processes including your in-progress processes, completed processes, and your team's forms.

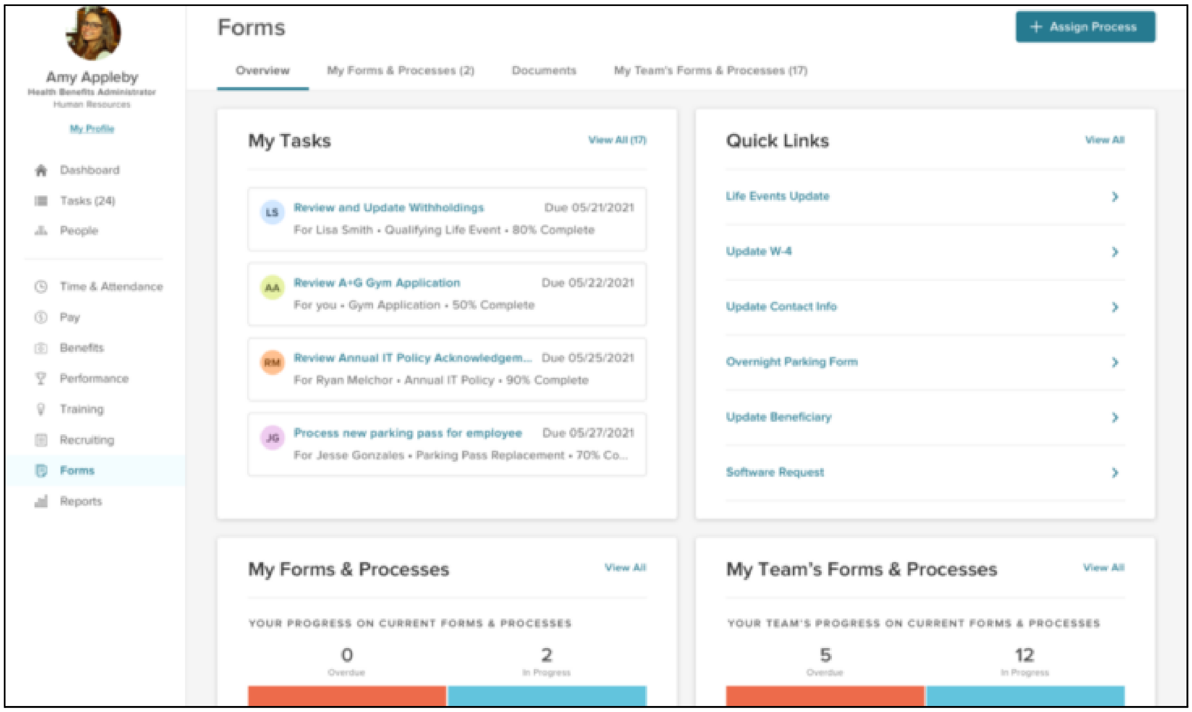

Figure 10: Forms Page - Manager View

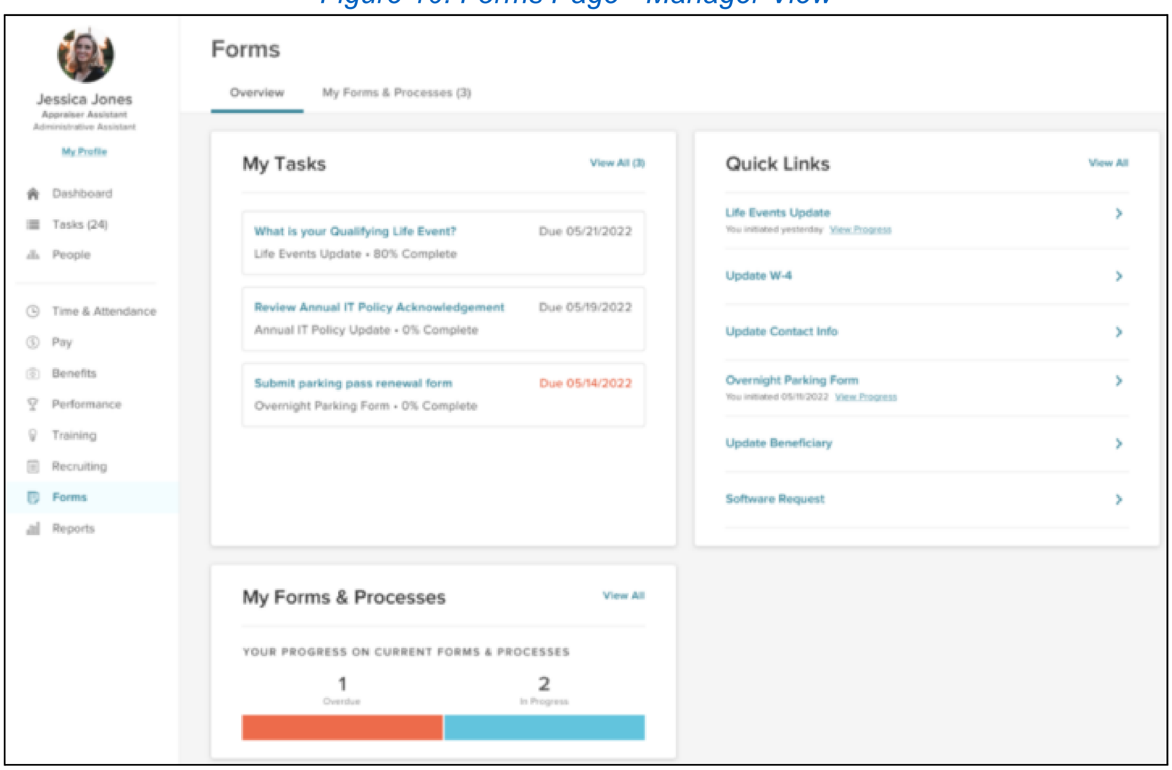

Figure 11: Forms Page - Employee view

Managers are able to Assign forms for users in their hierarchy from any tab in the Forms page.

On the Overview tab employees can see their tasks and available forms. Managers will also see interactive metrics on their Team’s Forms.

Users can view their Overdue and In-Progress processes that are related to the logged in employee. By clicking on the “View All” link, the user will land on the My Forms & Processes tab.

Managers and above user roles will see a My Team’s Forms and Process section. The My Team’s Forms and Process section allows users to keep track of the outstanding forms assigned or initiated by the employees they have access to. It will display the total Overdue and In Progress forms to be completed.

Under Quick Links, there are 6 available processes for self initiation and if a user would like to see all that are available, there is a “View All” link that will take them to the eForms main Quick Links page.

Forms - Documents Tab

This section allows managers and above user roles to have access to their employees files. Employees can access their documents through their profile.

Reports

The **Reports** tab is available for all Unified Self Service users. This page shows reports across all products you have access to.

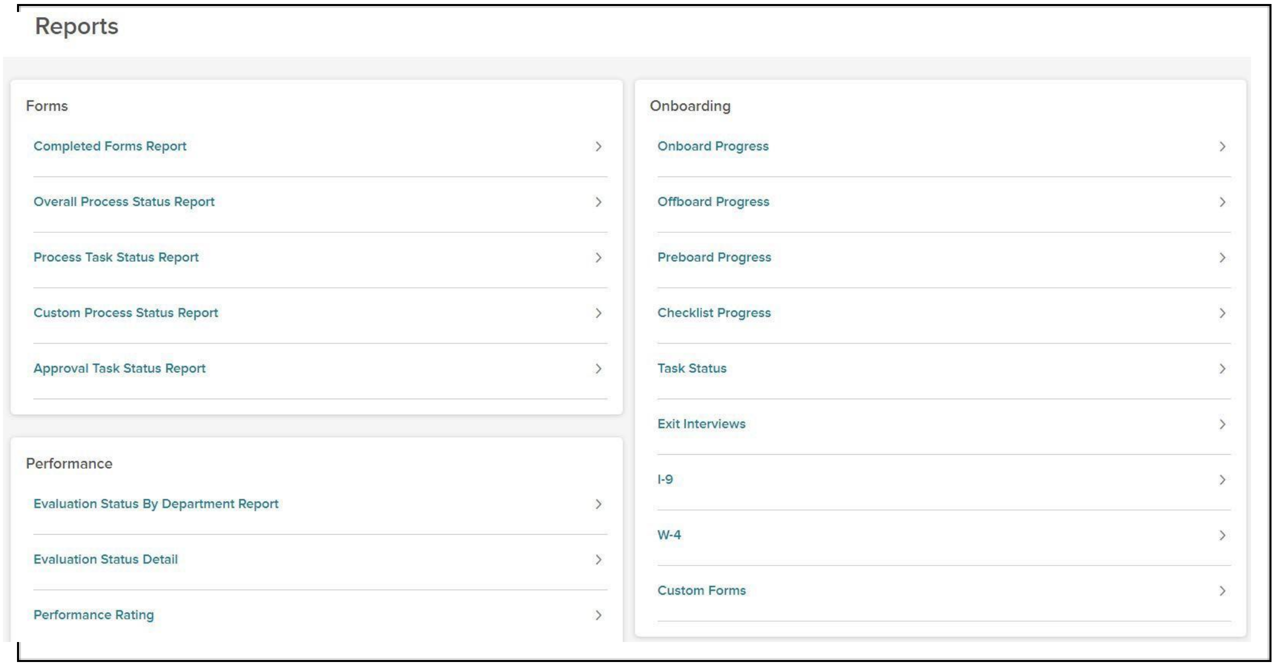

Figure 12: Reports Page

The report options available to you on the Reports page will vary depending on which products your organization uses, your permissions and scope, and your past activity. You can select a report name, or the arrow beside it to navigate to the Report Generator for that report. You can then filter or sort the report as well as export it to CSV, PDF or Excel format.

Performing Advanced Tasks

Sometimes to accomplish tasks or navigate to more detailed visibility, the Unified Self Service will take you to the NEOGOV Product that the action is tied to. When this happens, the Unified Self Service will prompt you with a **Navigating to** window or loading screen.

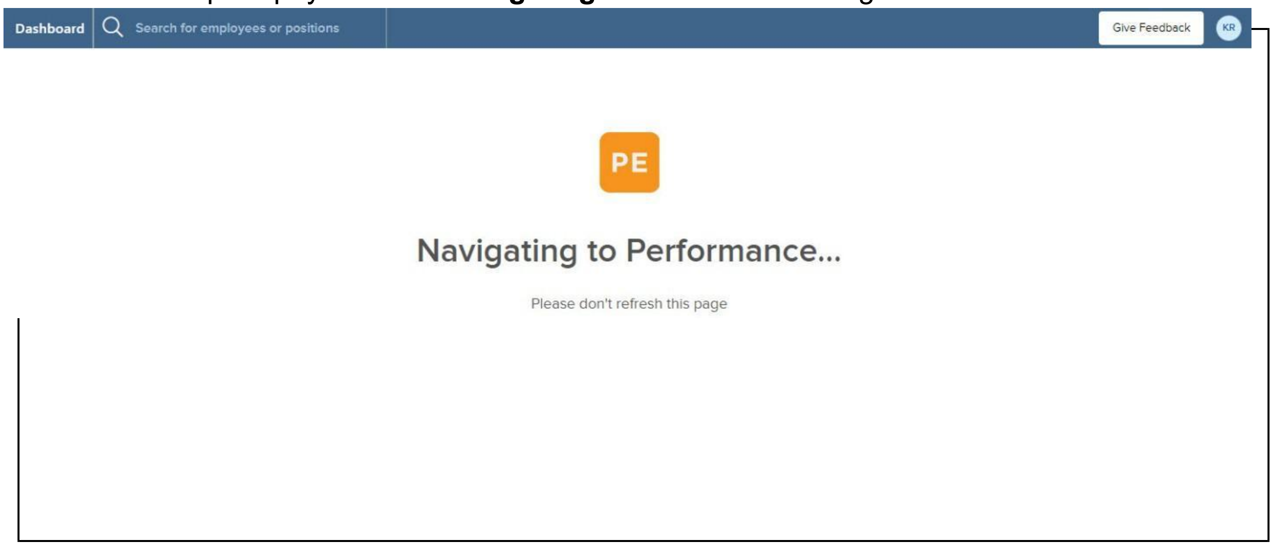

Figure 13: Navigating To Loading Screen

Once in the Product, you can continue with the action that you began in your Unified Self Service page or you can also complete additional tasks.

You can return at any time to the Unified Self Service page at any time by the Self Service icon in the top left of your screen.