

Onboarding - Overview

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With the Onboarding Solution, your application and onboarding forms are managed and accessed within an efficient, online, mobile friendly experience for your applicants and service reps.

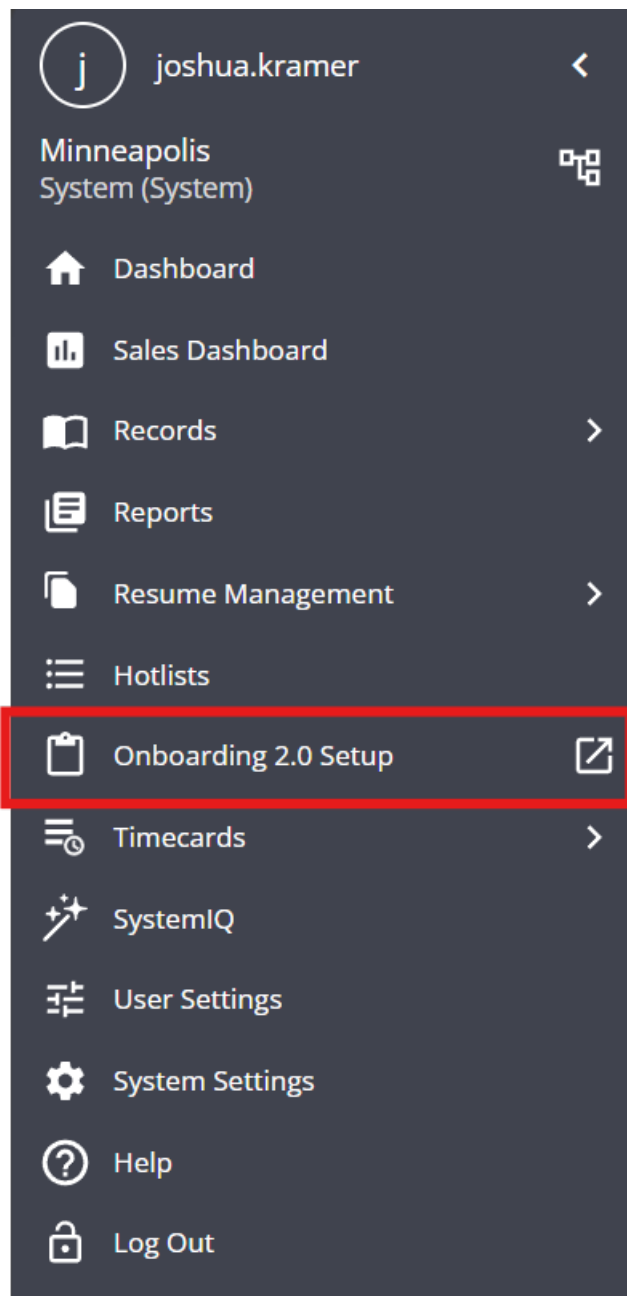
Through this onboarding experience, you can...

- Create feature-rich forms from scratch, through the uploading of PDF's, or through the use of the AI Form Builder.
- Link your forms to policies to ensure employees are receiving the correct forms, every time, automatically, based on your set conditions.
- Trigger automations that run when specific events are completed. From the automatic sending of an email once a task has been completed by a candidate to posting a message on the employee profile within Beyond when form fields have been completed, the options are vast.

For more information on the Onboarding Solution, please see the articles linked below.

Accessing the Onboarding Portal

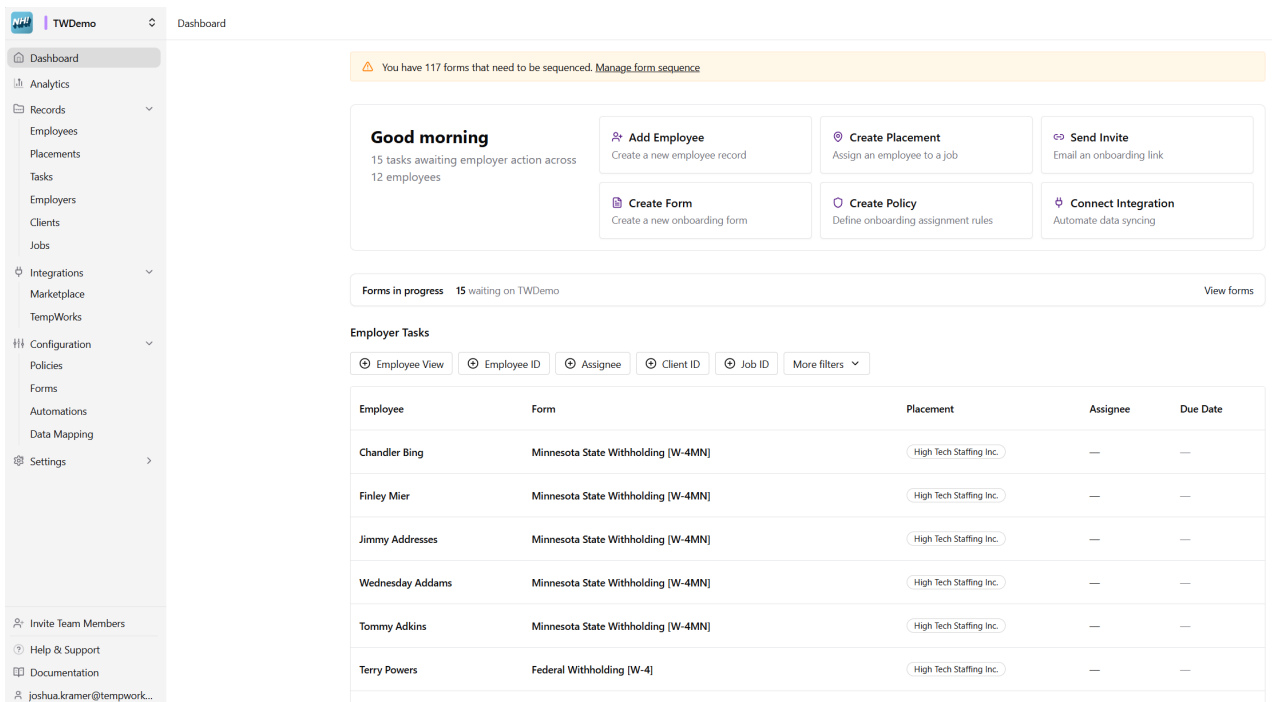
To access the Onboarding Portal, navigate to Beyond > B Menu > "Onboarding 2.0 Setup":



Note You must be a member of a Security Group with the “Can administrate Onboarding 2.0” permission to access the "Onboarding 2.0 Setup" tab.

For more information, please see the article titled [Beyond - Managing Security Groups](#).

You will be navigated to the Onboarding Dashboard where you will be able to create forms, policies, and automations. You will also be able to review records, edit settings, and more:



General

The following articles relate to general functionality within both Beyond and the Onboarding Portal:

- [Onboarding - Terminology](#)
- [Onboarding - The Applicant Process](#)
- [Onboarding - The Service Rep's Process](#)

Administration

The following articles relate to administrative functions within the Onboarding Portal:

- [Onboarding - User Groups and Permissions](#)
- [Onboarding - Syncing Data Between Beyond and the Onboarding Portal](#)
- [Onboarding - Understanding Themes](#)
- [Onboarding - How to Create a Theme](#)
- [Onboarding - How to Setup Kiosk Mode](#)
- [Onboarding - How to Create an API Token](#)

Forms

The following articles relate to managing forms within the Onboarding Portal:

- [Onboarding - Understanding Forms](#)
 - [Onboarding - Understanding Field Paths](#)
 - [Onboarding - Default Field Paths](#)
 - [Onboarding - How to Create Forms](#)
 - [Onboarding - How to Create a Quiz](#)
 - [Onboarding - Form Translations](#)
 - [Onboarding - How to Show/Hide Form Fields](#)
 - [Onboarding - Form Sequencing & Stages](#)
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Policies

The following articles relate to the managing of policies within the Onboarding Portal:

- [Onboarding - Understanding Policies](#)
 - [Onboarding - How to Setup Policies](#)
 - [Onboarding - Policy Rule Operators](#)
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Automations

The following articles relate to the managing of automations within the Onboarding Portal:

- [Onboarding - Understanding Automations](#)
- [Onboarding - How to Setup Automations](#)
- [Onboarding - Logging an Employee Message in Beyond via Automations](#)
- [Onboarding - Automation Triggers and Actions](#)

Related Articles
