# Attachments and Comments in iO

## Overview

- This job aid is intended for the HCM Initiator.
- **It's important to add attachments and comments to many of your faculty actions in iO.**
  - **Any attachments that you would have added to a PAF should still be attached in iO.**
  - **Comments are also extremely helpful to those reviewing your action. They inform us about your intent and purpose for this action, and will help us to make sure that the action matches your intent. Just as comments used to be routinely added to PAFs, please do so also in iO.**

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**There are two main paths to accomplish actions in iO: 1) the Apps/Navigator, and 2) Quick Actions.**

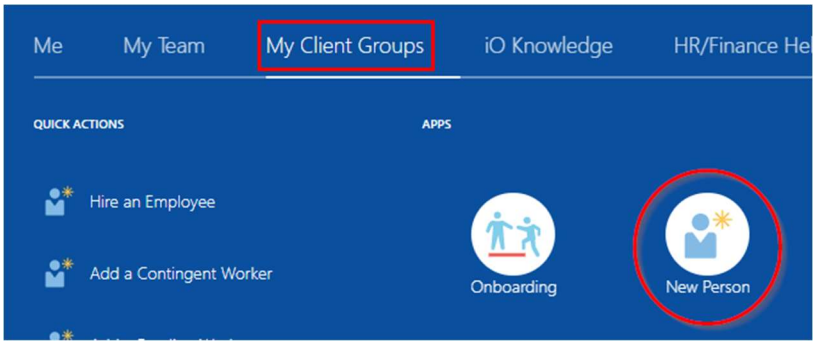
**Finding where to add attachments depends on which path you're using.**

# 1. Apps or Navigator

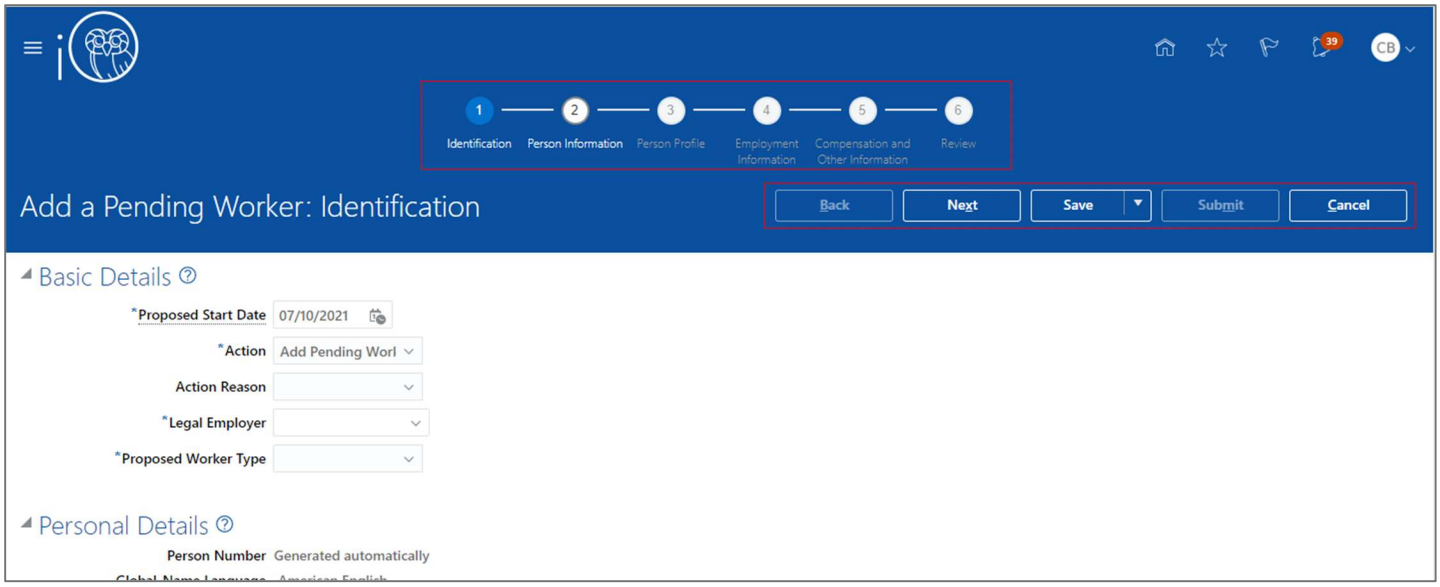
1. These are the paths most often described in the job aids. Even though there are two ways to get started on this path, it's still the same path once you get there. Let's say you want to add a new Adjunct, so you're going to Add a Pending Worker: Contingent Worker type.
   a. (Option 1) Click the Navigator icon in the upper left-hand corner of the iO page.

   On the panel that opens, unfold My Client Groups, and click on New Person.

   b. (Option 2) On the home page, on the My Client Groups tab, click on the New Person app.

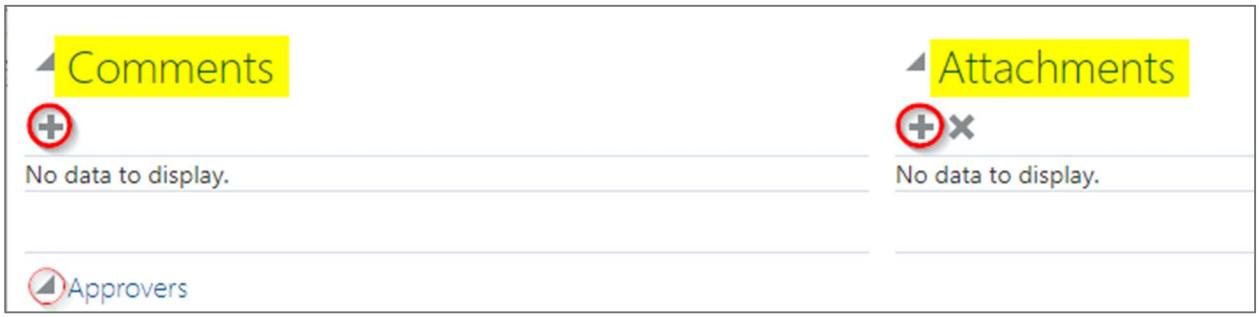



2. Whichever option you choose, it takes you to the same path, which ends up looking something like the following image.
   a. You have a "train track" across the top of the header. Each circle represents a page or "train stop" in which you may need to fill in or edit information.
   b. You have navigation buttons under that which allow you to save, advance to the next page, go back, cancel, and ultimately, review your action and submit it.
   c. When you are submitting or exiting without saving, this path gives you lots of warnings and chances to change your mind.



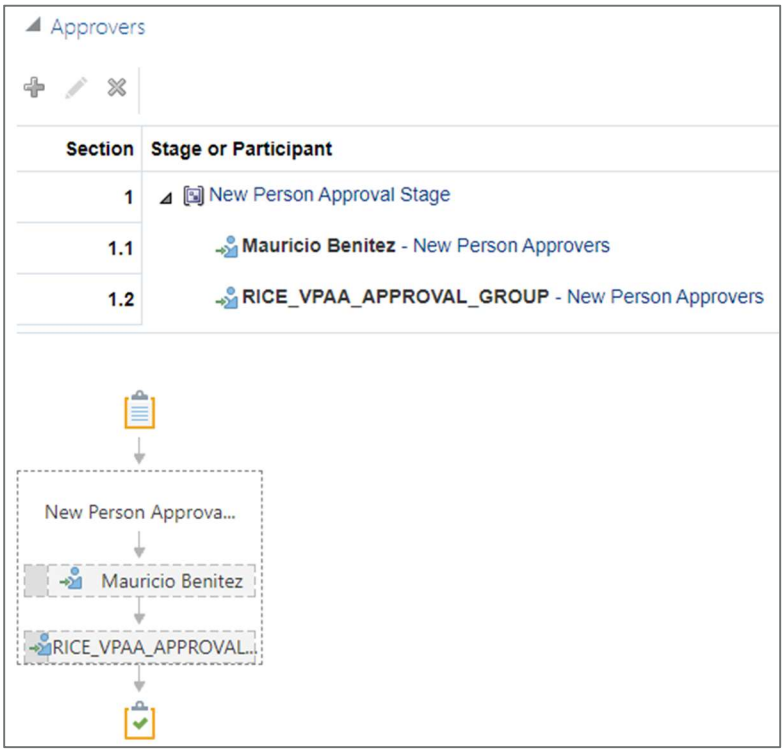

3. Despite all its advantages, you have to know the secret to finding how to add attachments and comments in this view. And here it is.
4. The last step before you submit the action is visiting the **Review** page.

5. On the **Review** page, scroll <u>all the way down to the bottom of the page</u>, and there you'll find it.




6. Just FYI, the attachments will not stay in iO once the action has been completely approved.

7. As long as we're here, there's something else you might be interested in. Unfold the Approvers section beneath Comments, and you'll see the path this action will follow. It will differ depending on your department/school and the type of action.

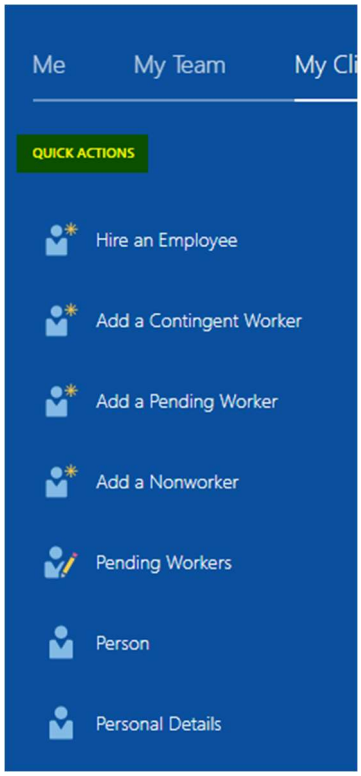


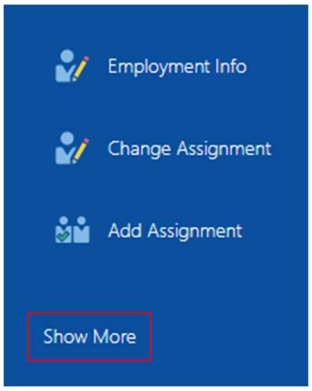

# 2. Quick Actions

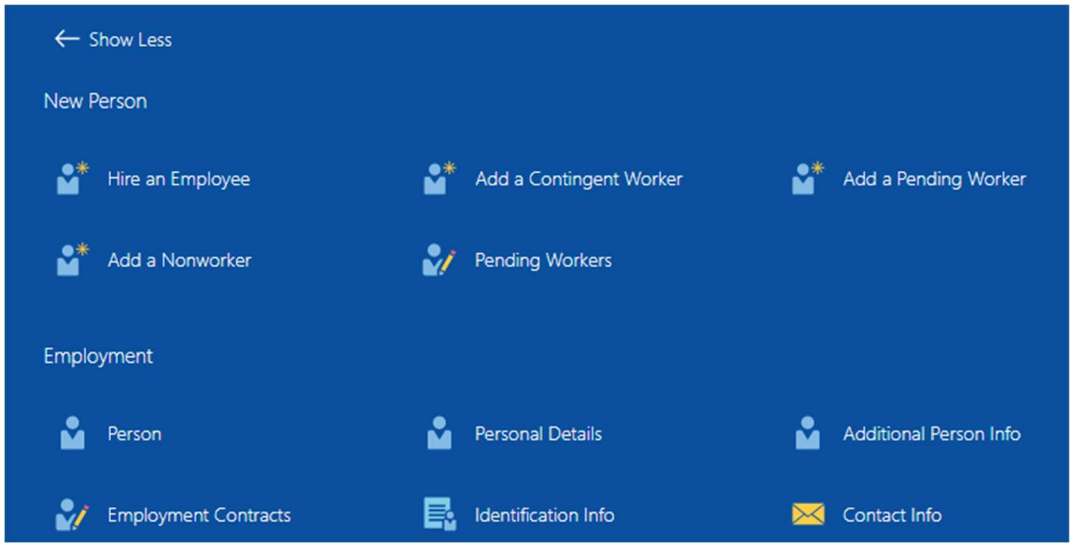
1. There is a second path to do many actions. **Quick Actions** are located in the left column of the home page.

2. To find more quick actions, scroll down and click **Show More.**

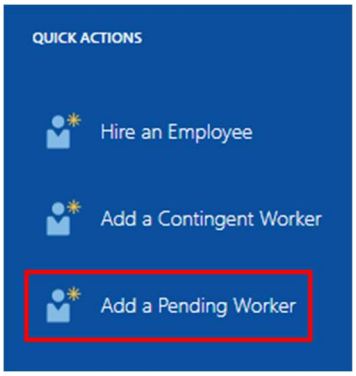
3. This opens a page of a long list of actions, divided into sections like New Person, Employment, Compensation, Onboarding, Hiring, etc.


Me
My Team
My Cli
QUICK ACTIONS
Hire an Employee
Add a Contingent Worker
Add a Pending Worker
Add a Nonworker
Pending Workers
Person
Personal Details

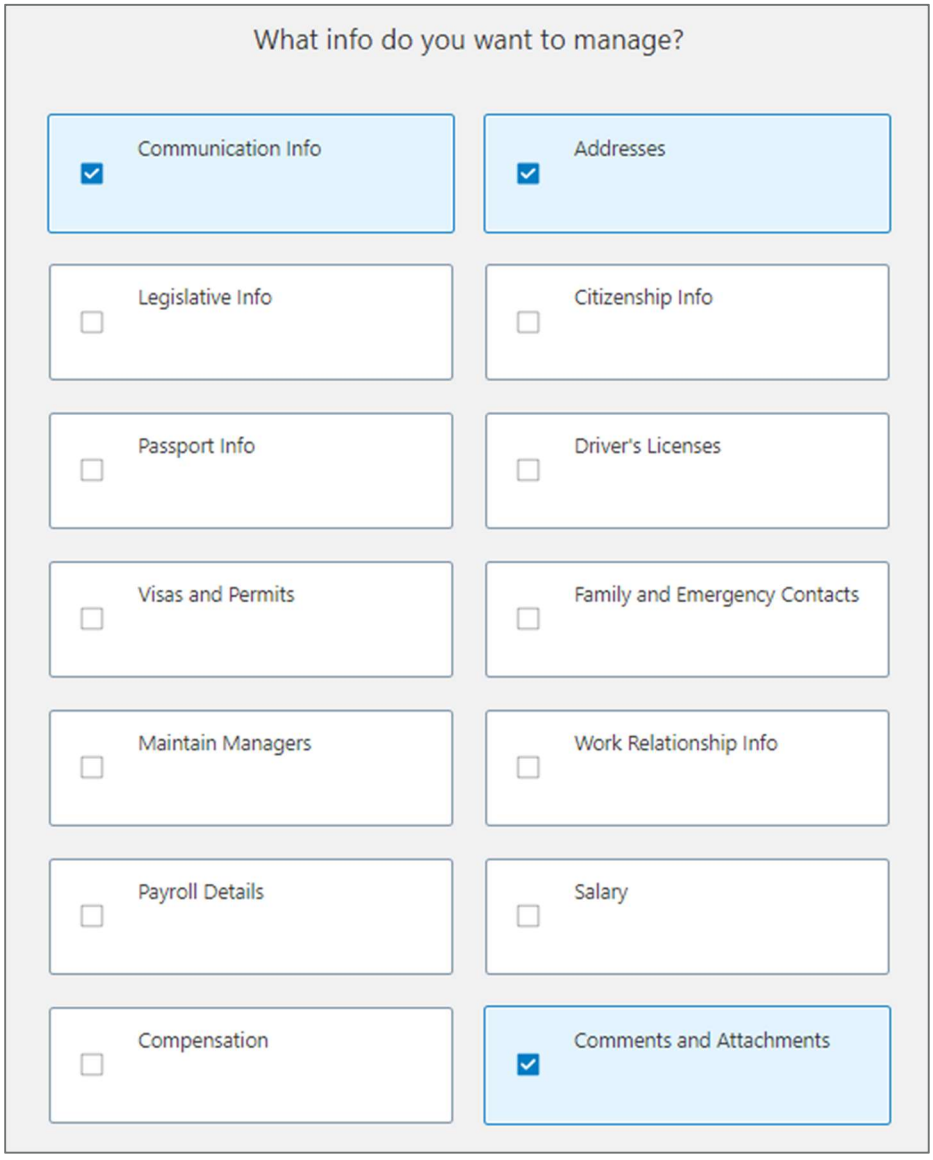

Employment Info
Change Assignment
Add Assignment
Show More


Show Less
New Person
Hire an Employee
Add a Contingent Worker
Add a Pending Worker
Add a Nonworker
Pending Workers
Employment
Person
Personal Details
Additional Person Info
Employment Contracts
Identification Info
Contact Info

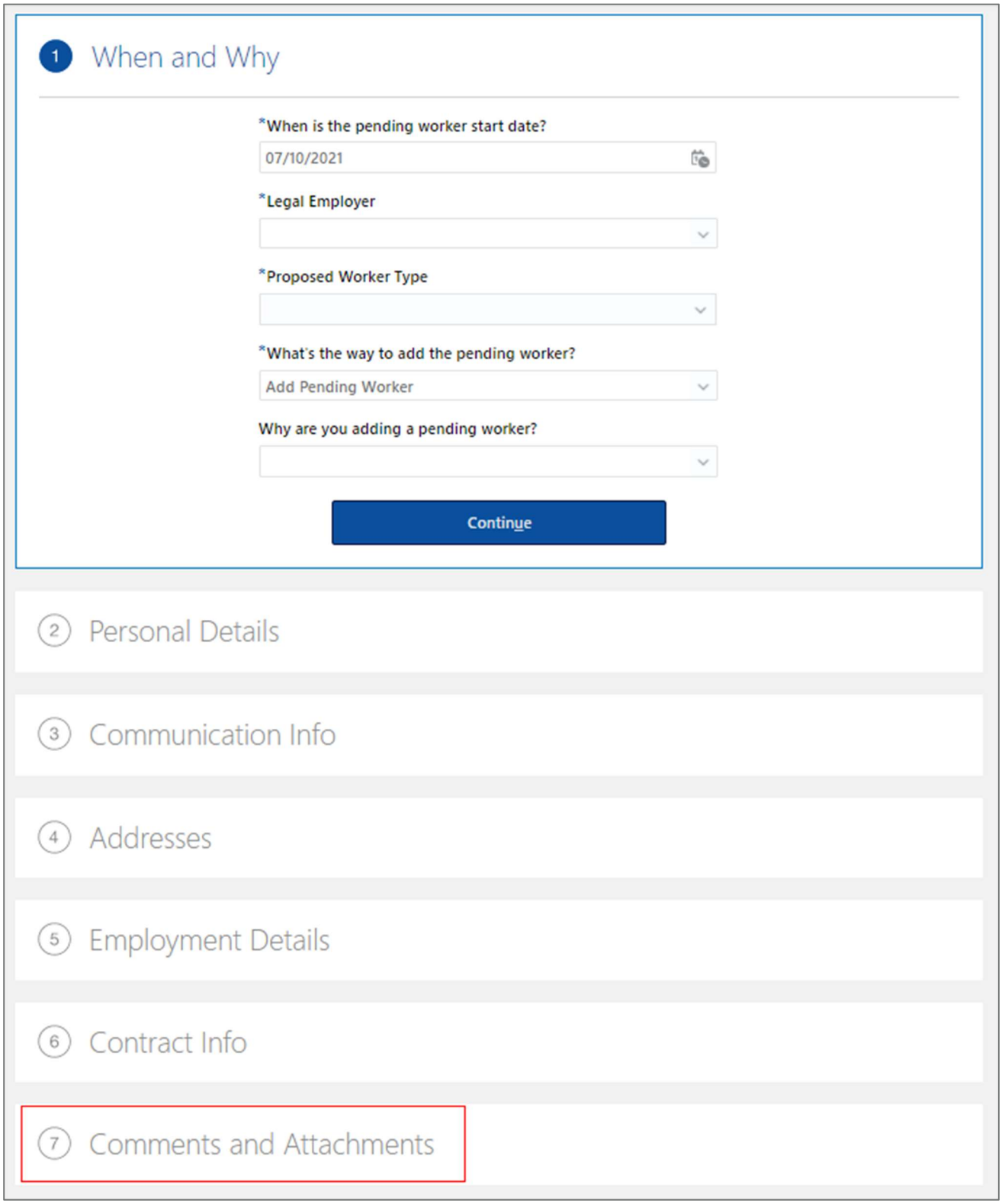
4. In the example of adding a new adjunct, this path starts in this way.



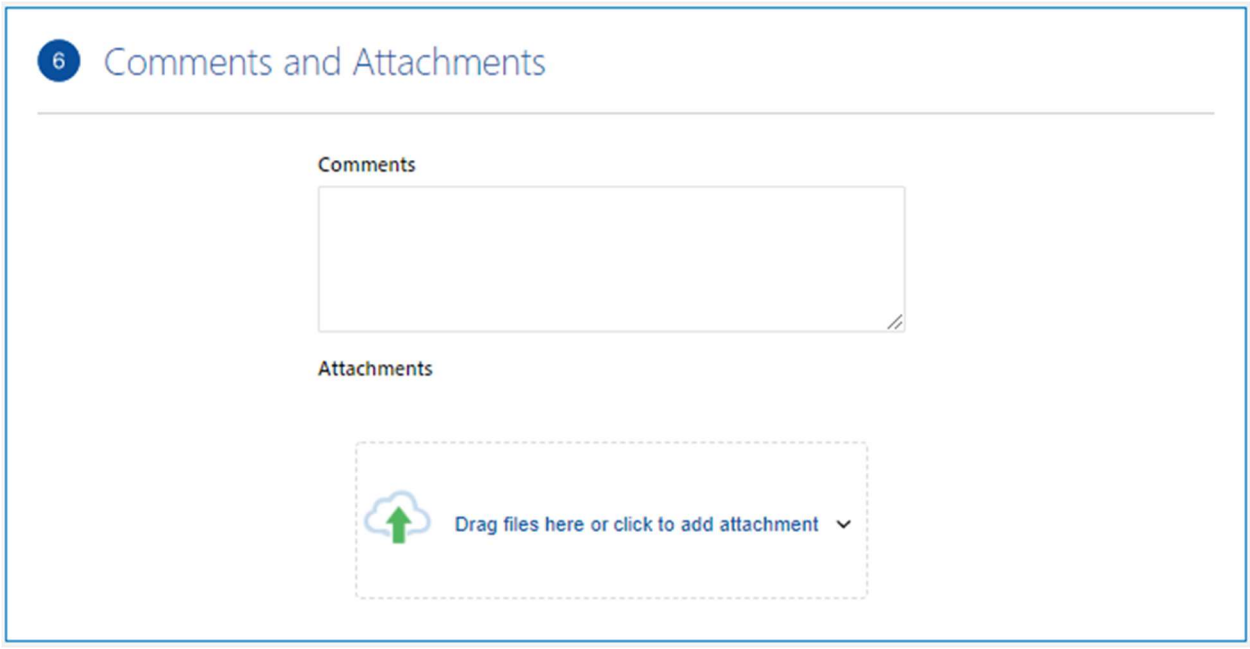

5. Then **Quick Actions** lets you choose what sections you need to add to or edit by selecting the checkmarks in the appropriate boxes.



6. Notice that one of the options is for **Comments and Attachments.**
7. When you hit **Continue** in the upper right corner, you are led through a number of sections that open when you click on their tiles.



8. When you get to that section, you have the opportunity to add comments and attachments.




9. Notice that there is no **Review** page in the **Quick Actions** path, and there is also no warning when you hit **Submit**, nor when you exit the action without saving. This path can be more efficient, with fewer clicks, but you should be more experienced before you attempt to use **Quick Actions** without detailed instructions.