



Acknowledgment List User Guide

Document Control Module



Introduction

In order to make sure that policies and procedures are read and understood by your staff, you need a system for disseminating information and for employees to acknowledge that they've read it. The Acknowledgment List allows you to assign employees to predetermined groups which you can then assign in bulk to acknowledge documents.

This saves time by removing the need to individually assign employees to these tasks and it removes the need for employees to sign a physical piece of paper.

Mastering this feature means getting the maximum value out of the Document Control module, freeing yourself of more clerical maintenance, and giving you time to focus on the things that matter.

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Adding Employees to Acknowledgment Lists

To begin adding employees to Acknowledgment Lists, navigate to the **Setup** tab, select a **Subject** folder, and then select a document to view all the color bars. **(Figure 1)**

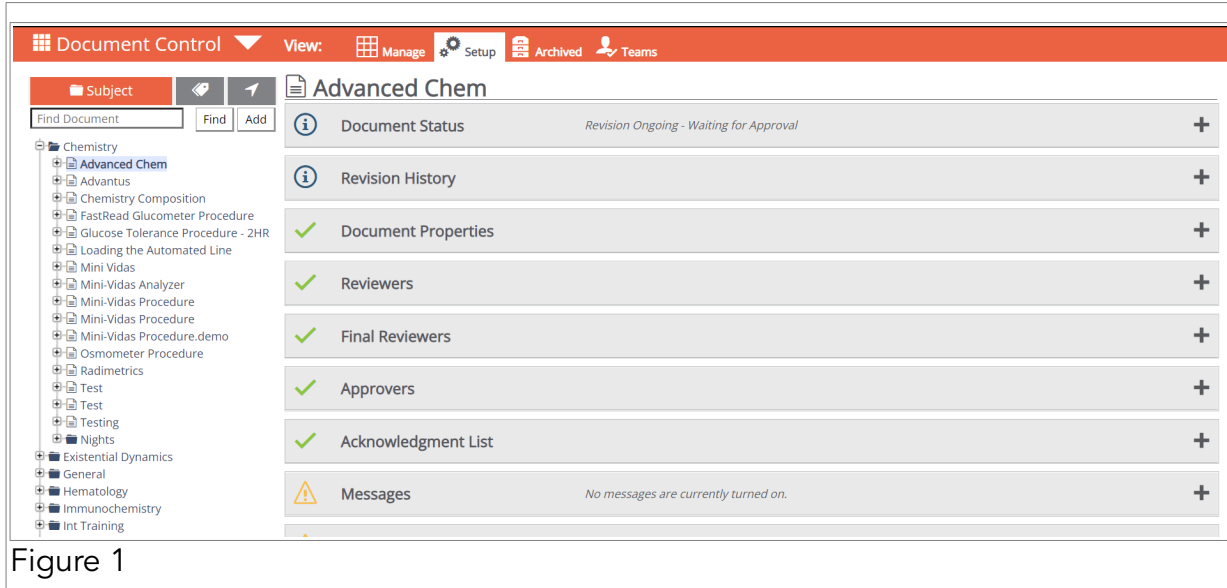


Figure 1

Select the **Acknowledgment List** color bar to expand it. **(Figure 2)**

Select either the **Add Employees** button (Yellow box, Figure 2) or the **Add Employee** link. **(Teal box, Figure 2)**

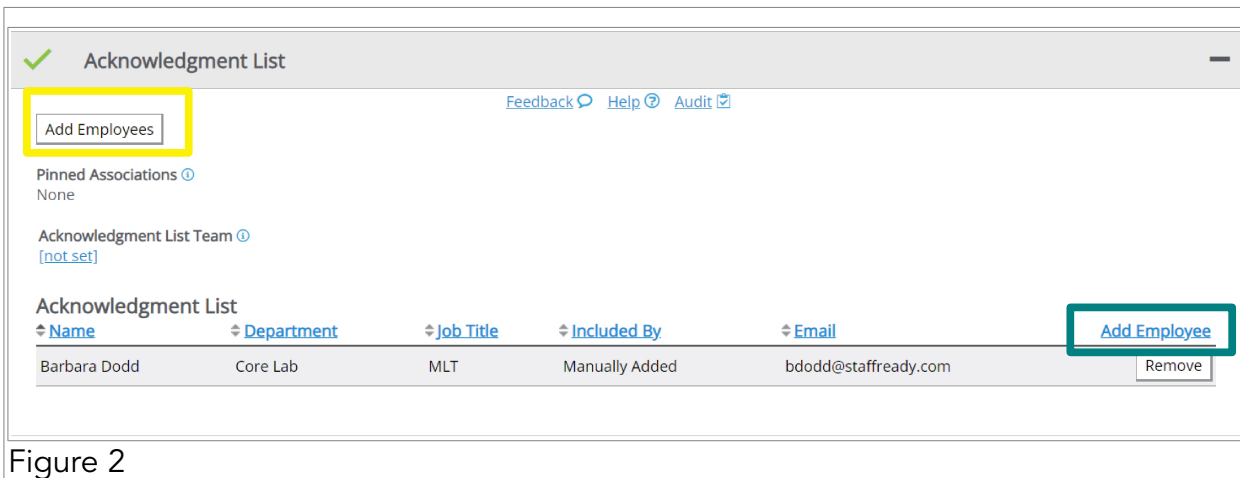


Figure 2

Add Employees Button and Pins

If you selected the **Add Employees** button outlined on the previous page, the **Add Employees** pop-up window will open. (Figure 1)

Search for a specific employee by typing their name in the search bar (Yellow box, Figure 1) or by using the filters. (Teal box, Figure 1)

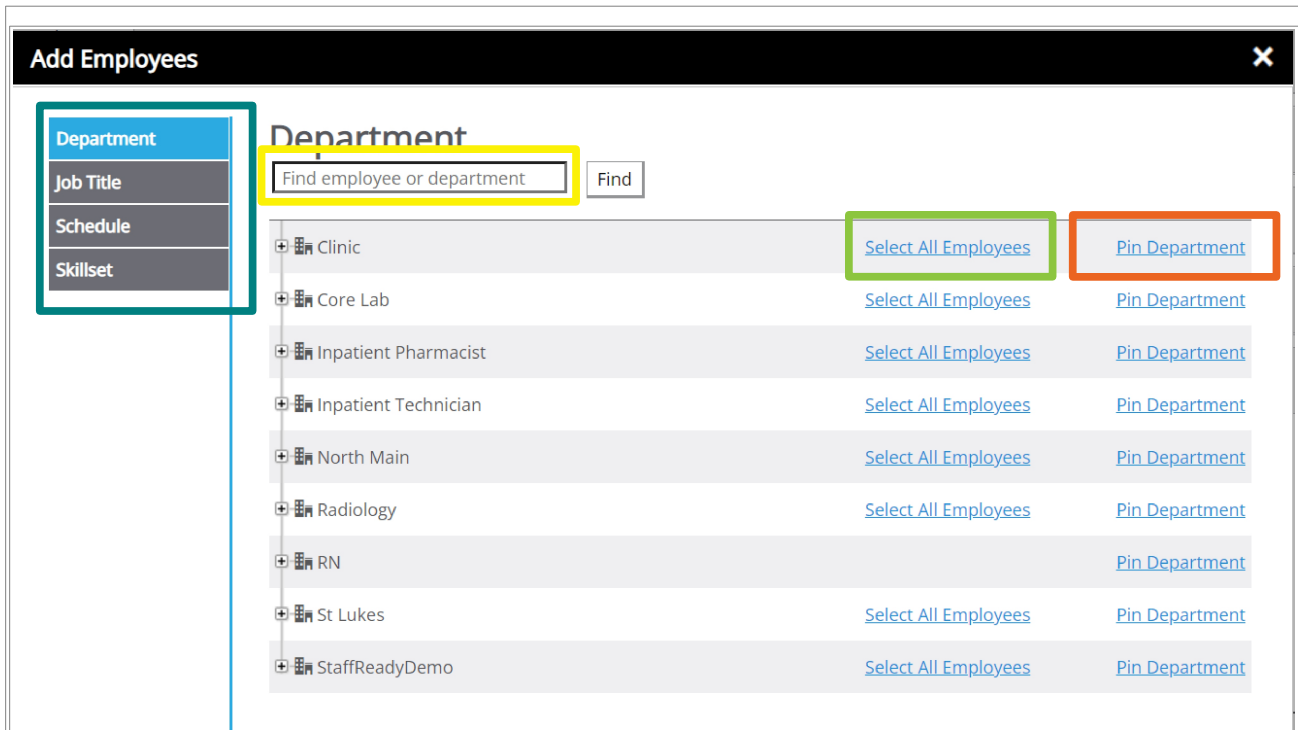


Figure 3

Click the **Select All Employees** link (Green box, Figure 1) to assign the document to all current employees within a department.

Additionally, you can choose to pin all current employees to the document, as well as any employees added to that department in the future. (Orange box, Figure 1)

Add Employees Link

If you selected the **Add Employees** link outlined on pg. 3, the **Add Employees** pop-up window will open. (Figure 1) Begin typing an employee's name and then select it from the dropdown menu. (Yellow box, Figure 1)



Figure 1

The **Add Employees** pop-up will change once you've selected your employee, displaying employee ID information. Select the **Add** button (Yellow box, Figure 2) when you're ready to finish the process.

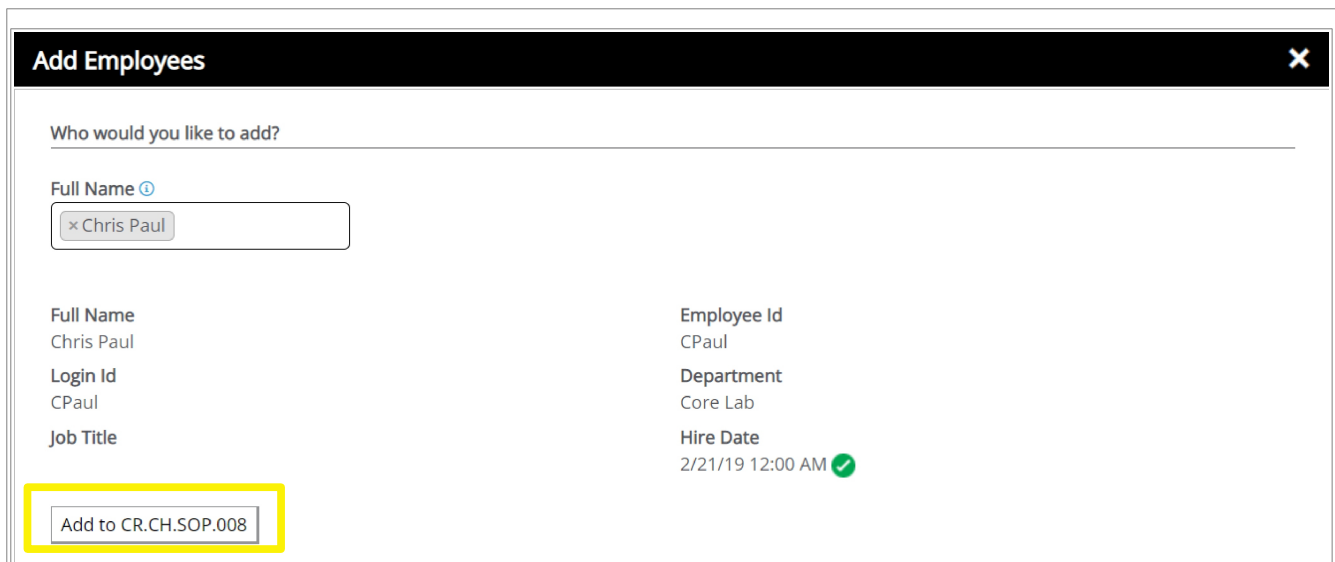


Figure 2

Resources

This concludes the User Guide for **Acknowledgment Lists**. We hope that you have a better understanding of this feature and how it functions within the entire framework of the Document Control module.

For more focused Guides on the functions and features discussed in this document, please check out the linked Guides on this page for supplemental reading.

For further assistance, please contact our Support Team directly.

Our service hours are Monday through Friday, 6am to 5pm PST.

Phone: 1-877-229-5230

[Online Support Form](#)

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