

Web Portal User Guide: Human Resource Login

Purpose

This guide is a basic introduction to our Web Portal and is intended to give a walkthrough of each feature. If you find that you need additional assistance with using the Web Portal, please contact your immigration team.

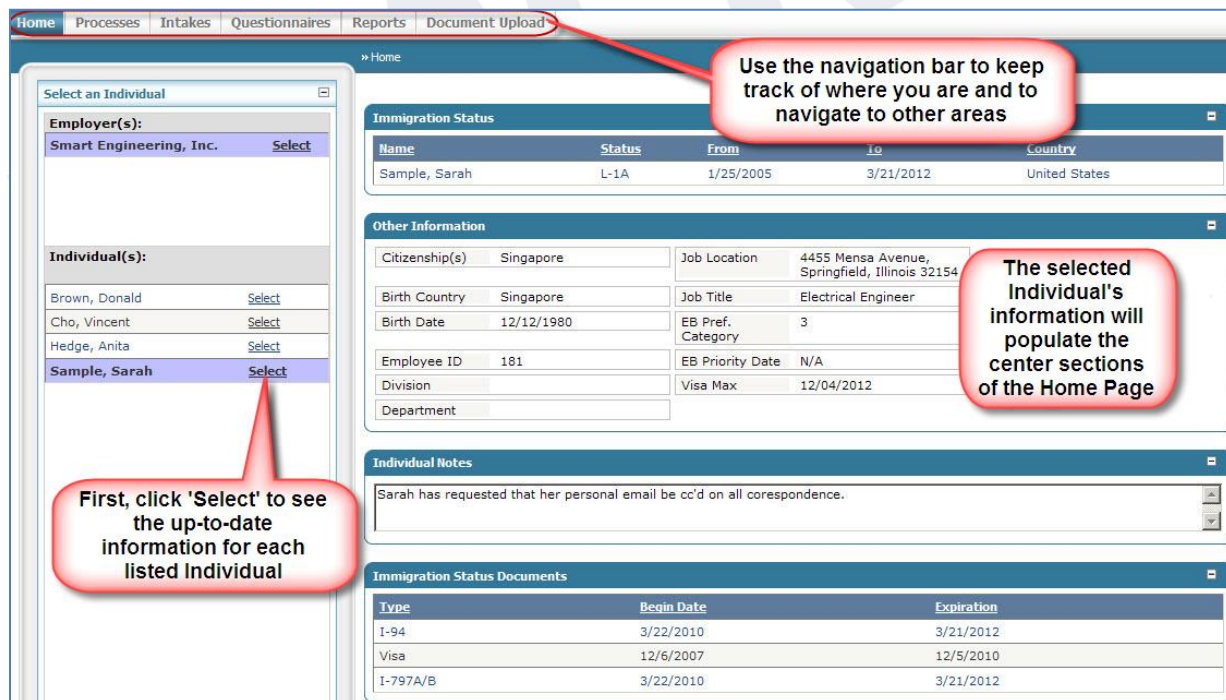
Available Tabs and Options

Home Tab

When you log on to the Web Portal, you will automatically be directed to the Home page, which provides you with a quick overview of the most important immigration information we currently have on file for each individual you have access to.

The **Select an Individual** section on the left side of the screen allows you to highlight the specific record you wish to view.

You can quickly access the Home, Processes, Intakes, Questionnaires, Reports, and Document Upload tabs located at the top of the navigation bar



The screenshot shows the TRACKER web portal interface. At the top is a navigation bar with tabs: Home, Processes, Intakes, Questionnaires, Reports, and Document Upload. The main content area is titled 'Home' and features a 'Select an Individual' sidebar on the left. The sidebar lists 'Employer(s): Smart Engineering, Inc.' and 'Individual(s): Brown, Donald; Cho, Vincent; Hedge, Anita; Sample, Sarah'. The 'Sample, Sarah' entry is selected. The main content area displays 'Immigration Status' (Name: Sample, Sarah; Status: L-1A; From: 1/25/2005; To: 3/21/2012; Country: United States), 'Other Information' (Citizenship(s): Singapore; Job Location: 4455 Mensa Avenue, Springfield, Illinois 32154; Birth Country: Singapore; Job Title: Electrical Engineer; Birth Date: 12/12/1980; EB Pref. Category: 3; Employee ID: 181; EB Priority Date: N/A; Division: ; Visa Max: 12/04/2012; Department:), 'Individual Notes' (Sarah has requested that her personal email be cc'd on all correspondence.), and 'Immigration Status Documents' (Type: I-94, Begin Date: 3/22/2010, Expiration: 3/21/2012; Type: Visa, Begin Date: 12/6/2007, Expiration: 12/5/2010; Type: I-797A/B, Begin Date: 3/22/2010, Expiration: 3/21/2012).

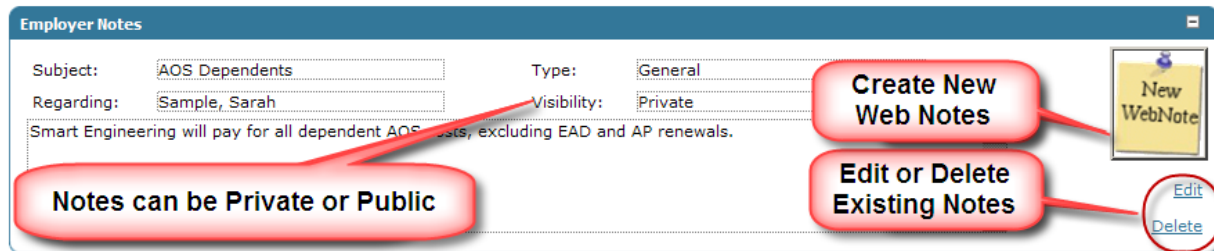
Use the navigation bar to keep track of where you are and to navigate to other areas

First, click 'Select' to see the up-to-date information for each listed Individual

The selected Individual's information will populate the center sections of the Home Page

The Home page also offers an **Employer Note** section as a way to store important information specific to an Individual record. There are two types of notes: Public notes

that are visible to you, the immigration team, and any other contact that has access to the same individual; or Private notes that are exclusively visible to the author. You can designate Public or Private settings under the Visibility drop down options. You can also Edit and Delete existing Notes.



Employer Notes

Subject: Type:
 Regarding: Visibility:
 Smart Engineering will pay for all dependent AOS costs, excluding EAD and AP renewals.

Create New Web Notes (Callout pointing to 'New WebNote' button)

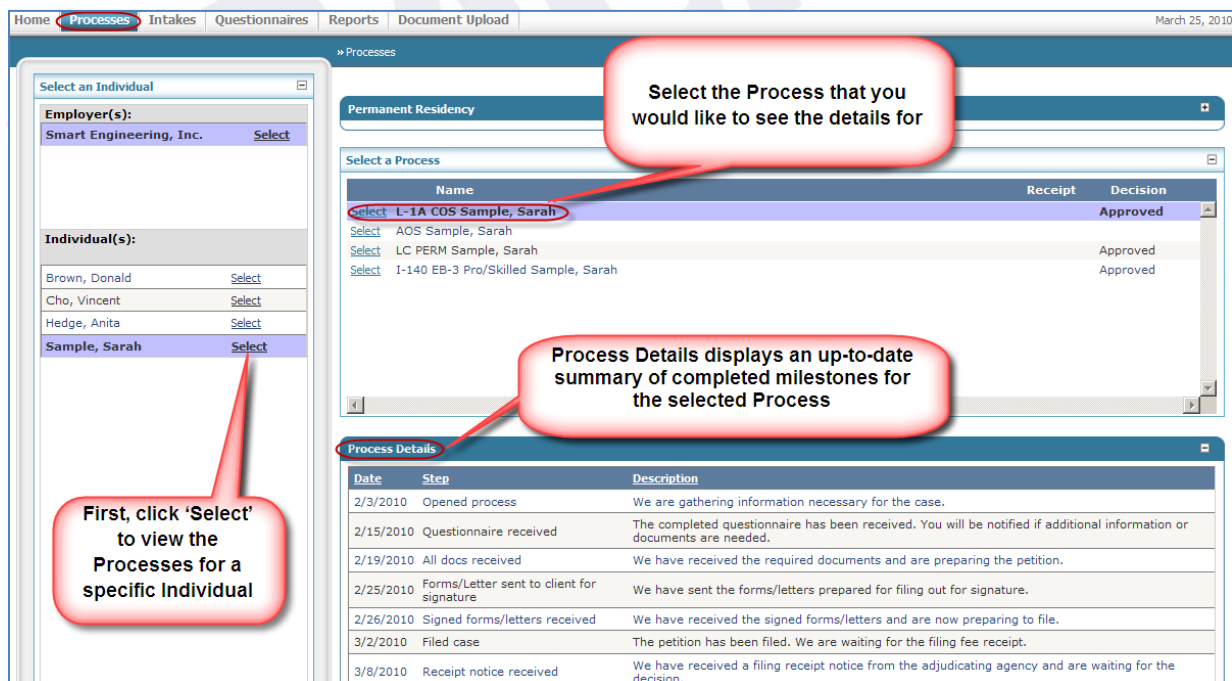
Edit or Delete Existing Notes (Callout pointing to 'Edit' and 'Delete' buttons)

Notes can be Private or Public (Callout pointing to the 'Visibility' dropdown)

Processes Tab

The Process that is selected in the **Select a Process** section will determine what details are displayed in the **Process Details** section. The current process will appear with a lavender shading.

If the selected Individual/Family Member has more than one process that we are working on (or have worked on) for him or her, you will be able to see the **Process Details** you are interested in by clicking the **Select** option next to that process in the **Select a Process** section.



Home **Processes** Intakes Questionnaires Reports Document Upload March 25, 2010

Select an Individual

Employer(s):
Smart Engineering, Inc. [Select](#)

Individual(s):

Brown, Donald	Select
Cho, Vincent	Select
Hedge, Anita	Select
Sample, Sarah	Select

Permanent Residency

Select a Process

Name	Receipt	Decision
Select L-1A COS Sample, Sarah		Approved
Select AOS Sample, Sarah		
Select LC PERM Sample, Sarah		Approved
Select I-140 EB-3 Pro/Skilled Sample, Sarah		Approved

Process Details

Date	Step	Description
2/3/2010	Opened process	We are gathering information necessary for the case.
2/15/2010	Questionnaire received	The completed questionnaire has been received. You will be notified if additional information or documents are needed.
2/19/2010	All docs received	We have received the required documents and are preparing the petition.
2/25/2010	Forms/Letter sent to client for signature	We have sent the forms/letters prepared for filing out for signature.
2/26/2010	Signed forms/letters received	We have received the signed forms/letters and are now preparing to file.
3/2/2010	Filed case	The petition has been filed. We are waiting for the filing fee receipt.
3/8/2010	Receipt notice received	We have received a filing receipt notice from the adjudicating agency and are waiting for the decision.

First, click 'Select' to view the Processes for a specific Individual (Callout pointing to the 'Select' button for 'Sample, Sarah')

Select the Process that you would like to see the details for (Callout pointing to the 'Select' button for 'L-1A COS Sample, Sarah')

Process Details displays an up-to-date summary of completed milestones for the selected Process (Callout pointing to the 'Process Details' table)

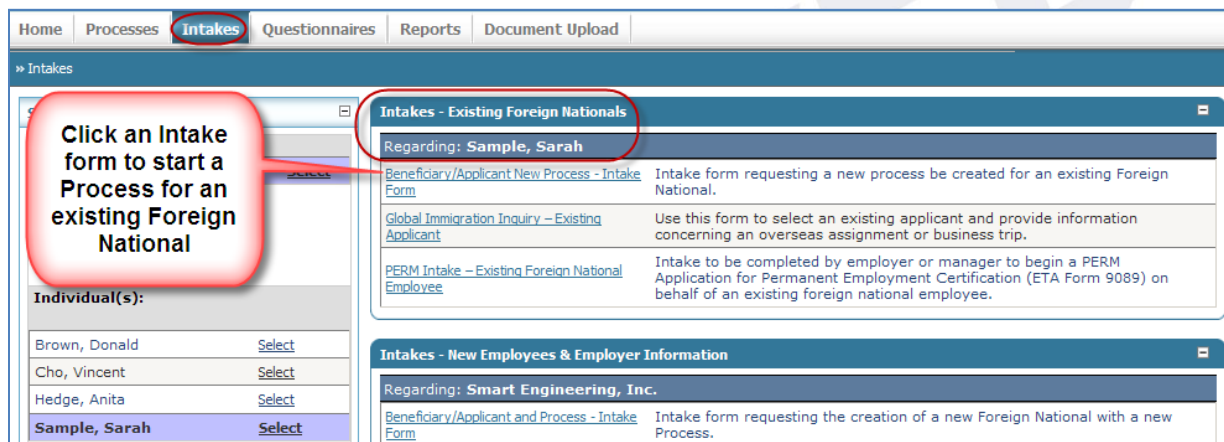
Intake Tab

Intakes allow you to submit two types of requests.

- 1) Create a new Individual with a new Process
- 2) Create a new Process for an Individual that already exists in Tracker

To submit a request to create a new Individual with a new Process simply click the appropriate link in the **Intakes – Existing Foreign Nationals** section to open and begin completing the form

Tip! To request a process other than a PERM or Global Visa, please use the Beneficiary/Applicant New Process – Intake Form option.



Home Processes **Intakes** Questionnaires Reports Document Upload

» Intakes

Intakes - Existing Foreign Nationals

Regarding: **Sample, Sarah**

Beneficiary/Applicant New Process - Intake Form	Intake form requesting a new process be created for an existing Foreign National.
Global Immigration Inquiry - Existing Applicant	Use this form to select an existing applicant and provide information concerning an overseas assignment or business trip.
PERM Intake - Existing Foreign National Employee	Intake to be completed by employer or manager to begin a PERM Application for Permanent Employment Certification (ETA Form 9089) on behalf of an existing foreign national employee.

Intakes - New Employees & Employer Information

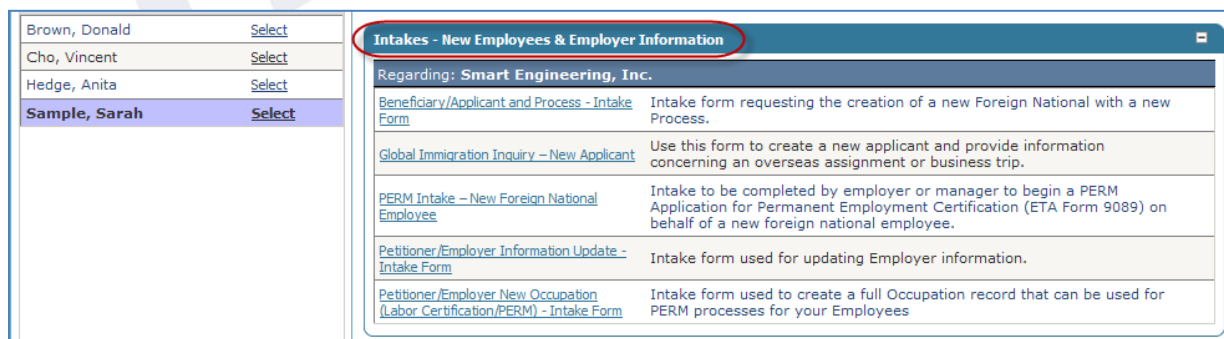
Regarding: **Smart Engineering, Inc.**

Beneficiary/Applicant and Process - Intake Form	Intake form requesting the creation of a new Foreign National with a new Process.
Global Immigration Inquiry - New Applicant	Use this form to create a new applicant and provide information concerning an overseas assignment or business trip.
PERM Intake - New Foreign National Employee	Intake to be completed by employer or manager to begin a PERM Application for Permanent Employment Certification (ETA Form 9089) on behalf of a new foreign national employee.
Petitioner/Employer Information Update - Intake Form	Intake form used for updating Employer information.
Petitioner/Employer New Occupation (Labor Certification/PERM) - Intake Form	Intake form used to create a full Occupation record that can be used for PERM processes for your Employees

Individual(s):

Brown, Donald	Select
Cho, Vincent	Select
Hedge, Anita	Select
Sample, Sarah	Select

To create a new Individual and Process concurrently, simply click on the appropriate link in the Intakes – New Employees & Employer Information section and begin completing the form.



Brown, Donald	Select
Cho, Vincent	Select
Hedge, Anita	Select
Sample, Sarah	Select

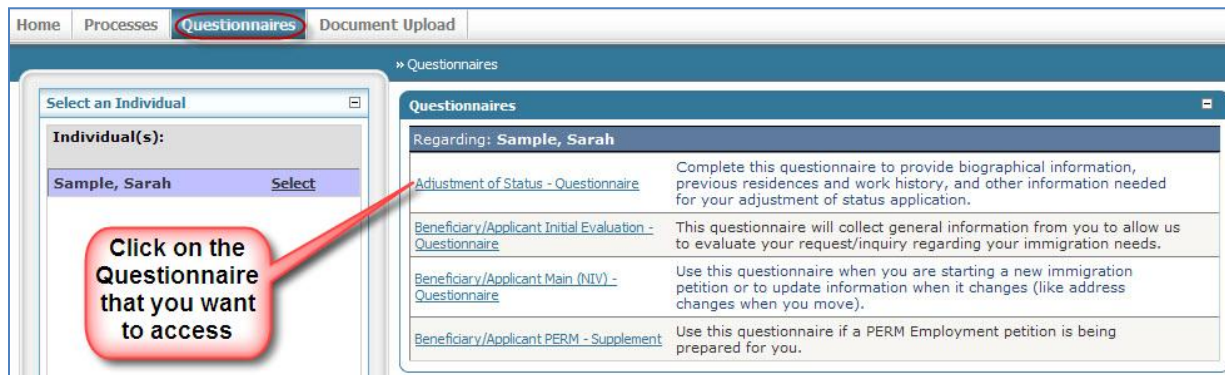
Intakes - New Employees & Employer Information

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Questionnaire Tab

Questionnaires allow you to review the Questionnaires that we have enabled for a specific Individual with the ability to edit and submit Questionnaires on their behalf. Click on questionnaire in the Questionnaire list that you wish to examine. If you cannot find an Intake or Questionnaire that you need, please contact your Immigration Team and tell them that it is not visible when you log-in to the Web Portal.



Home Processes **Questionnaires** Document Upload

» Questionnaires

Select an Individual

Individual(s):

Sample, Sarah Select

Click on the Questionnaire that you want to access

Questionnaires

Regarding: **Sample, Sarah**

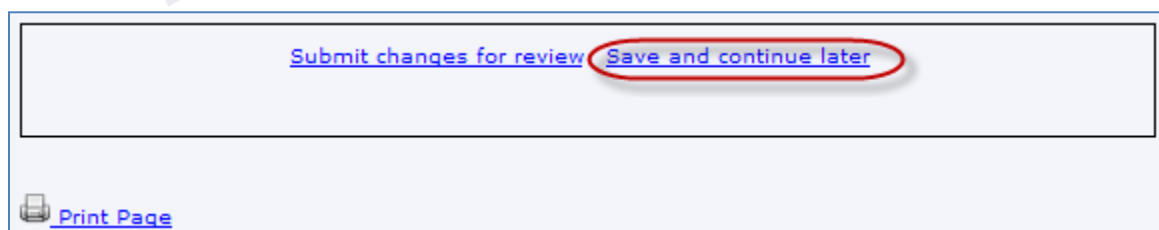
Adjustment of Status - Questionnaire	Complete this questionnaire to provide biographical information, previous residences and work history, and other information needed for your adjustment of status application.
Beneficiary/Applicant Initial Evaluation - Questionnaire	This questionnaire will collect general information from you to allow us to evaluate your request/inquiry regarding your immigration needs.
Beneficiary/Applicant Main (NIV) - Questionnaire	Use this questionnaire when you are starting a new immigration petition or to update information when it changes (like address changes when you move).
Beneficiary/Applicant PERM - Supplement	Use this questionnaire if a PERM Employment petition is being prepared for you.

Saving and Returning to Intakes and Questionnaire


If information has begun to be entered into the Intake or Questionnaire but it cannot be completed all in one sitting, there is an option to save the data so that it can be completed later. This option will not send the information to your Immigration Team for review – it will just save the information in the form so that it does not need to be re-entered later.

To use this feature, begin adding data to or making changes to data in the form. When you are ready to leave the questionnaire, scroll down to the bottom and click on the **Save and continue later** option.

When you next log into the portal and open the same questionnaire, the data that was previously entered will be available.



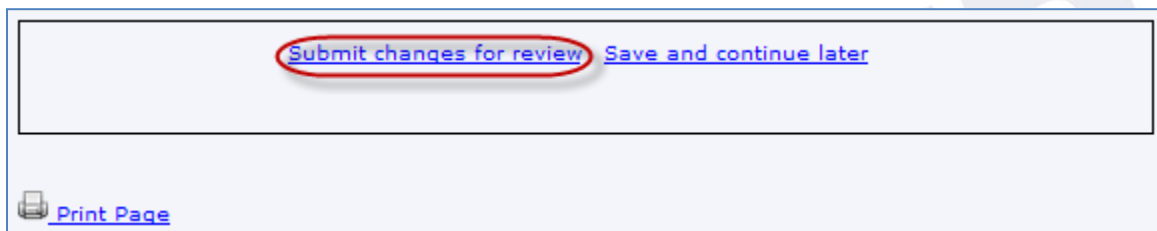
[Submit changes for review](#) **Save and continue later**

 [Print Page](#)


Submitting Intakes or Questionnaires

Once you have completed an Intake or Questionnaire and want your Immigration Team to review it, click the **Submit changes for review** option at the bottom of the form. Please note that required fields/questions will be outlined in red and must be completed before you can submit the questionnaire for review.

Note: If you need to submit updated information (a new Job title, Worksite, etc) open an Intake or Questionnaire that has that information (Example: Beneficiary/Applicant New Process – Intake Form) update the information and click submit.



[Submit changes for review](#)
[Save and continue later](#)

 [Print Page](#)

Once you have completed the Intake or Questionnaire, you have the option to save or submit the form. Your Immigration Team will be notified when a form is submitted for review. When your Immigration Team reviews an Intake Request or Questionnaire they have the option of Accepting or Rejecting it. You will be notified via email when a request is Accepted or Rejected, including instructions when applicable.

Reports Tab

The **Reports** section offers a powerful Web Portal tool designed to help you organize and display specific details, easily run preconfigured Reports, or generate a custom Report through the Report Wizard.



Home Processes Intakes Questionnaires **Reports** Document Upload

» Reports

Select an Individual

Employer(s):
Smart Engineering, Inc. [Select](#)

Individuals:
Brown, Donald [Select](#)

Cho, Vincent [Select](#)

Hedge, Anita [Select](#)

Sample, Sarah [Select](#)

Reports

Category	Name	Description
Expirations	My Expirations	Lists any status document that has an expiration date belonging to Employees linked to Employers you are authorized for.
Individuals	My Individuals	Lists any Individuals that you are authorized to view.
Processes	Processes in Preparation	All Processes - In Preparation, not yet filed.
Processes	Processes Filed and Pending	All Processes - Filed and Pending (awaiting decision).
Processes	All Processes	All Processes (both those In Preparation and those Filed and Pending).
Processes	Web Notes	All Web Notes you have entered.
Expirations	Consolidated Expirations	Lists any status document that has an expiration date belonging to Employees linked to Employers you are authorized for.

For your convenience, this section lists the most common, preconfigured Reports

Report Wizards

Report Wizards allow you to select the data that you want to see or export. You can save a report definition and re-use it in the future without having to re-enter the fields and criteria you want every time.

There are two types of Report Wizard options:

- 1) Process Report Wizard shows x,y, and z. There will be one row / record per process so there may be multiple records per employee. This option is the best for getting detailed information about Processes.
- 2) Individual Report Wizard shows a, b, and c. There will be only one row / record per Individual, and there will be additional columns for each related Process.

Report Wizards	
Name	Description
Process Report Wizard	Select the fields you want to see reported with the option to set their order, export to MS Excel or to Adobe PDF. (A record will appear for each Process so you may see multiple records per employee.)
Individual Report Wizard	Select the fields you want to see reported with the option to set their order, export to MS Excel or to Adobe PDF. (A column will appear for each process.)

The **Report Wizard's** simple user interface will guide you through the process of creating your custom reports. Report Wizard allows significant flexibility in terms of what information you do and do not want to include.

- 1) Once you launch the **Report Wizard**, the type of report that you clicked on should already be selected (**Person Report** or **Process Report**). Click **Next**.

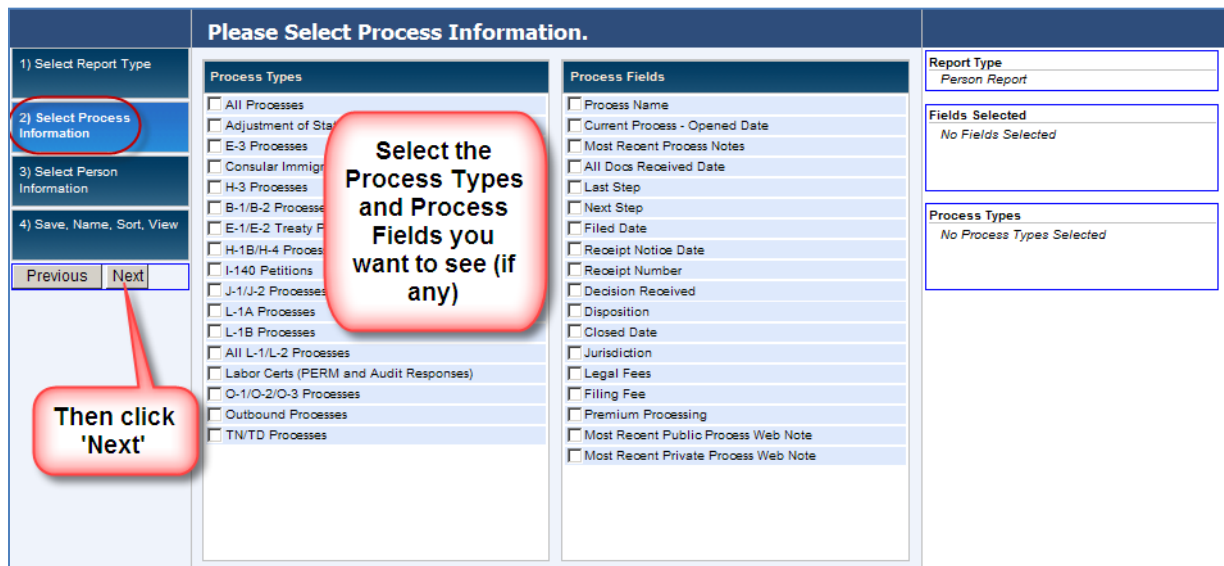
Please Select a Report Type.

<div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">1) Select Report Type</div> <div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">2) Select Process Information</div> <div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">3) Select Person Information</div> <div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">4) Save, Name, Sort, View</div> <div style="text-align: center; margin-top: 5px;"> Previous Next </div>	<div style="border: 1px solid #2e5496; padding: 5px; margin-bottom: 10px;"> <div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">● Person Report</div> <p style="font-size: small; margin: 5px 0;">The Individual Report Wizard will present a single row/record per international employee with any selected data appended to that row.</p> <div style="border: 2px solid red; border-radius: 15px; padding: 10px; text-align: center; color: white; font-weight: bold; margin: 10px 0;"> After you decide which report type (Person or Process) Click 'Next' </div> </div> <div style="border: 1px solid #2e5496; padding: 5px;"> <div style="background-color: #2e5496; color: white; padding: 2px; text-align: center; font-weight: bold; border: 1px solid white;">● Process Report</div> <p style="font-size: small; margin: 5px 0;">The Process Report Wizard will present a single row/record per process. The report will have multiple rows per international employee if you select multiple process types.</p> </div>	<div style="border: 1px solid #2e5496; padding: 5px; margin-bottom: 5px;"> <div style="font-size: x-small; font-weight: bold;">Report Type</div> <div style="font-size: x-small;">Person Report</div> </div> <div style="border: 1px solid #2e5496; padding: 5px; margin-bottom: 5px;"> <div style="font-size: x-small; font-weight: bold;">Fields Selected</div> <div style="font-size: x-small;">No Fields Selected</div> </div> <div style="border: 1px solid #2e5496; padding: 5px;"> <div style="font-size: x-small; font-weight: bold;">Process Types</div> <div style="font-size: x-small;">No Process Types Selected</div> </div>
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Use the navigation links or the next button on the left to continue.

Please note if you are creating a Person Report and you do not want any process information on the report, you do not have to select any process information from the "Select Process Information" section.

- 2) The next screen shows two types of data that are available.
 - a. Process Types – select either All or the specific types of Processes that you'd like to include in the report.
 - b. Process Fields – select the fields that you would like to appear for any of the Processes that were selected in the previous screen.



Please Select Process Information.

1) Select Report Type

2) Select Process Information

3) Select Person Information

4) Save, Name, Sort, View

Previous Next

Select the Process Types and Process Fields you want to see (if any)

Then click 'Next'

Process Types

- All Processes
- Adjustment of Status
- E-3 Processes
- Consular Immigration
- H-3 Processes
- B-1/B-2 Processes
- E-1/E-2 Treaty Processes
- H-1B/H-4 Processes
- I-140 Petitions
- J-1/J-2 Processes
- L-1A Processes
- L-1B Processes
- All L-1/L-2 Processes
- Labor Certs (PERM and Audit Responses)
- O-1/O-2/O-3 Processes
- Outbound Processes
- TN/TD Processes

Process Fields

- Process Name
- Current Process - Opened Date
- Most Recent Process Notes
- All Docs Received Date
- Last Step
- Next Step
- Filed Date
- Receipt Notice Date
- Receipt Number
- Decision Received
- Disposition
- Closed Date
- Jurisdiction
- Legal Fees
- Filing Fee
- Premium Processing
- Most Recent Public Process Web Note
- Most Recent Private Process Web Note

Report Type
Person Report

Fields Selected
No Fields Selected

Process Types
No Process Types Selected

Note: If you are creating a Person Report and you do not want to view any process information, you do not have to select any Process Types or Process Fields. This is entirely up to you based upon your reporting needs.

Next, select the Individual Fields you want to display on the report. Individual Fields are categorized by

- 1) Individual Info – Includes general biographical information
- 2) Contact Information – Includes email, phone, and address(es)
- 3) Job – Includes Current Employer, Title, Worksite, PERM recruitment information, etc.
- 4) Immigration Status – Includes status classification type, expiration dates, “Green Card” information (if any), etc.
- 5) Status Documents – Includes Status Document types and dates

To view the list of fields under each category, simply click the blue section headers. The header will slide up and all available fields will then be available for selection.

Please Select Individual Fields.

1) Select Report Type
2) Select Process Information
3) Select Person Information
4) Save, Name, Sort, View

Individual Info

- A-Number
- Birth City
- Birth Country
- Birth Date
- Birth State
- Employee ID
- Citizenship
- Gender
- Alias
- Prefix
- Given Name
- Family Name
- Maiden Name
- Marital Status
- Marriage Date
- Marriage Place
- SSN
- Individual Note
- Most Recent Public Individual Web Note
- Most Recent Private Individual Web Note

Contact Information

Job

Immigration Status

Status Documents

Click on a checkbox to add it to the report. Click the Blue Section Headers ("Individual Info", "Contact Information", etc) to display the fields in those sections.

Report Type
Person Report

Fields Selected

1. Given Name
2. Family Name
3. Supervisor Name
4. Supervisor Phone
5. Job Site City
6. NIV / Temp Status
7. Status End
8. Visa Max
9. Perm Res Started
10. EB Pref Category
11. EB Priority Date

Process Types
No Process Types Selected

Previous Next

Then click 'Next'

Choose which data fields you want to include from the 5 categories

The right column will display a summary of the report criteria you have selected

Next, you can organize, review, and save your custom report.

Order, Save, And View

1) Select Report Type
2) Select Process Information
3) Select Person Information
4) Save, Name, Sort, View

Given Name
Family Name
Supervisor Name
Supervisor Phone
Job Site City
NIV / Temp Status
Status End
Visa Max
Perm Res Started
EB Pref Category
EB Priority Date

Title
Dallas Worksite Process Report

Actions

View Report Save And View Report
View Excel Save and View Excel

Click, drag, and drop the report items you have selected to order them.

Name your Report

1. Given Name
2. Family Name
3. Supervisor Name
4. Supervisor Phone
5. Job Site City
6. NIV / Temp Status
7. Status End
8. Visa Max
9. Perm Res Started
10. EB Pref Category
11. EB Priority Date

Process Types
No Process Types Selected

Previous Next

Note: You can change the order in which the fields are displayed by dragging and dropping items

Choose to save your Report and view it in either Excel or Web based format

Saved reports will now appear in your **Saved Reports** list, where they can be reviewed, edited, or deleted.

Report Wizards

Name	Description
Process Report Wizard	Select the fields you want to see reported with the option to set their order, export to MS Excel or to Adobe PDF. (A record will appear for each Process so you may see multiple records per employee.)
Individual Report Wizard	Select the fields you want to see reported with the option to set their order, export to MS Excel or to Adobe PDF. (A column will appear for each process.)

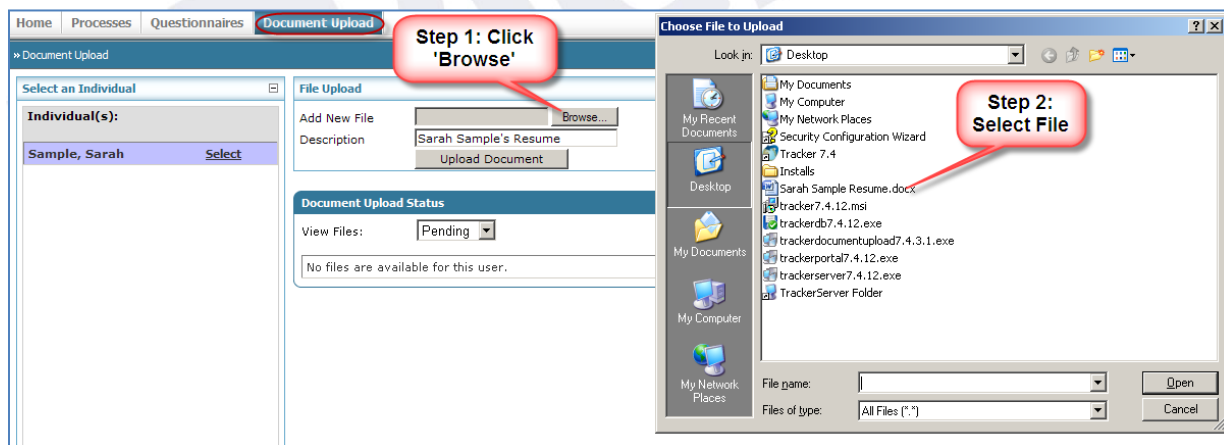
Saved Reports

Report Title	Description	Created On	Modified On
Edit Delete Dallas Worksite Process Report		4/14/2010 3:58:33 PM	

Online Document Vault™

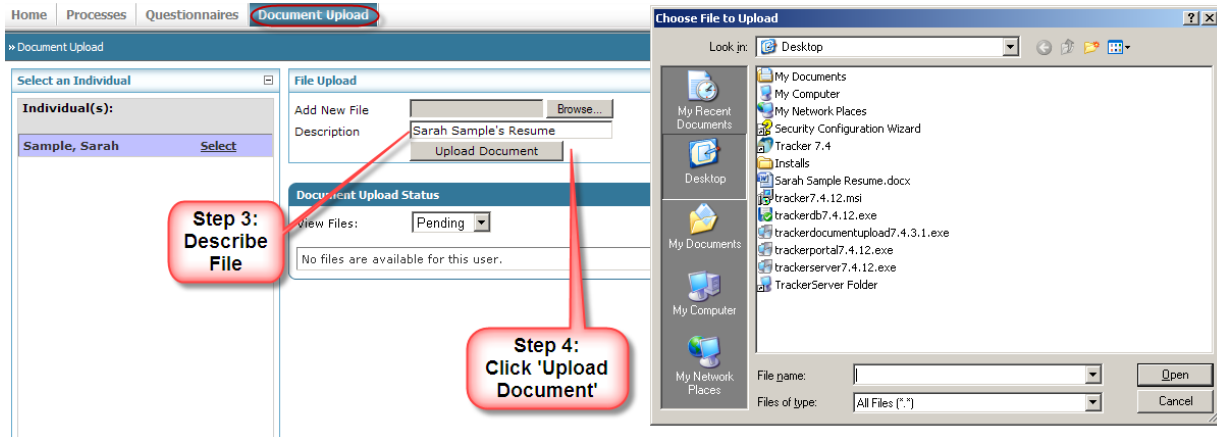
You can now safely and securely send documents to us through the **Online Document Vault™** feature. After selecting the Individual that you want to upload the document for, please follow each step detailed below.

1. Click the **Browse** button and a browse box will appear which allows you to search your computer for the document that you want to upload.
2. Double-click the file you wish to upload. Your file will now appear near the **Browse** button on the upload page.



The screenshot shows the 'Document Upload' page in the application. On the left, under 'Select an Individual', 'Sample, Sarah' is selected. In the 'File Upload' section, the 'Browse...' button is highlighted with a red callout box labeled 'Step 1: Click 'Browse''. To the right, a 'Choose File to Upload' dialog box is open, showing the 'Desktop' location. The file 'Sarah Sample Resume.docx' is selected and highlighted with a red callout box labeled 'Step 2: Select File'. The dialog box also shows other files like 'Tracker 7.4' and 'Installs'.

3. Type a description of your file into the **Description** box.
4. Click the **Upload** button.



Home | Processes | Questionnaires | **Document Upload**

» Document Upload

Select an Individual

Individual(s):

Sample, Sarah **Select**

File Upload

Add New File **Browse...**

Description: Sarah Sample's Resume

Upload Document

Document Upload Status

View Files: Pending

No files are available for this user.

Step 3: Describe File

Step 4: Click 'Upload Document'

Choose File to Upload

Look in: Desktop

My Documents
My Computer
My Network Places
Security Configuration Wizard
Tracker 7.4
Installs
Sarah Sample Resume.docx
tracker7.4.12.msi
trackerb7.4.12.exe
trackerdocumentupload7.4.3.1.exe
trackerportal7.4.12.exe
trackerserver7.4.12.exe
TrackerServer Folder

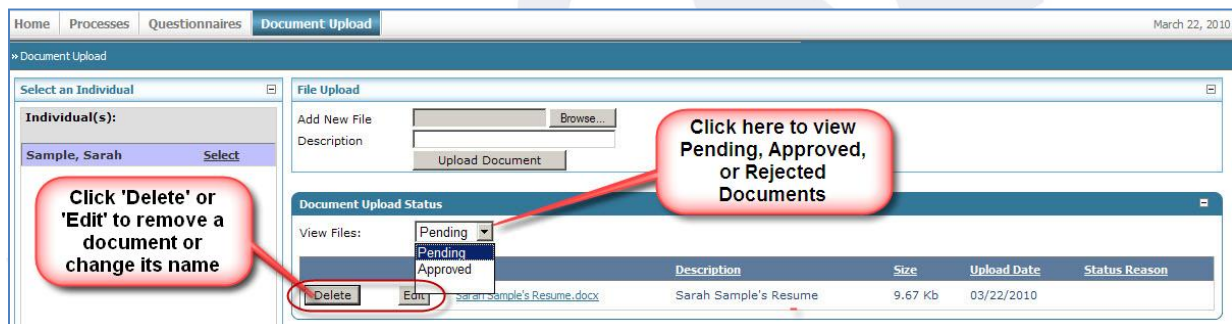
File name:

Files of type: All Files (*.*)

Open **Cancel**

5. Repeat steps 1 through 4 for each document.

When a file is uploaded successfully, it will appear in the **Document Upload Status** section pending review by your Immigration Team. Here, you can edit the name or delete a document, and review previously submitted documents through the **View Files** pull down option.



Home | Processes | Questionnaires | **Document Upload** March 22, 2010

» Document Upload

Select an Individual

Individual(s):

Sample, Sarah **Select**

File Upload

Add New File **Browse...**

Description:

Upload Document

Document Upload Status

View Files: Pending

View Files: Pending, Approved

	Description	Size	Upload Date	Status Reason
Delete Edit	Sarah Sample's Resume.docx	9.67 Kb	03/22/2010	

Click 'Delete' or 'Edit' to remove a document or change its name

Click here to view Pending, Approved, or Rejected Documents