

Zip Documents -Single process

A new capability has been added to the ICM system for those users that need to create a zipped download of client documents related to a specific matter. Previously the only option was a zip file of “All” documents stored in a client’s record into a zip file. With this new feature, users may now navigate to the “process level” OnDocs and create a zip file of only documents that relate to that specific matter and documents that have been designated as belonging to “all” processes.

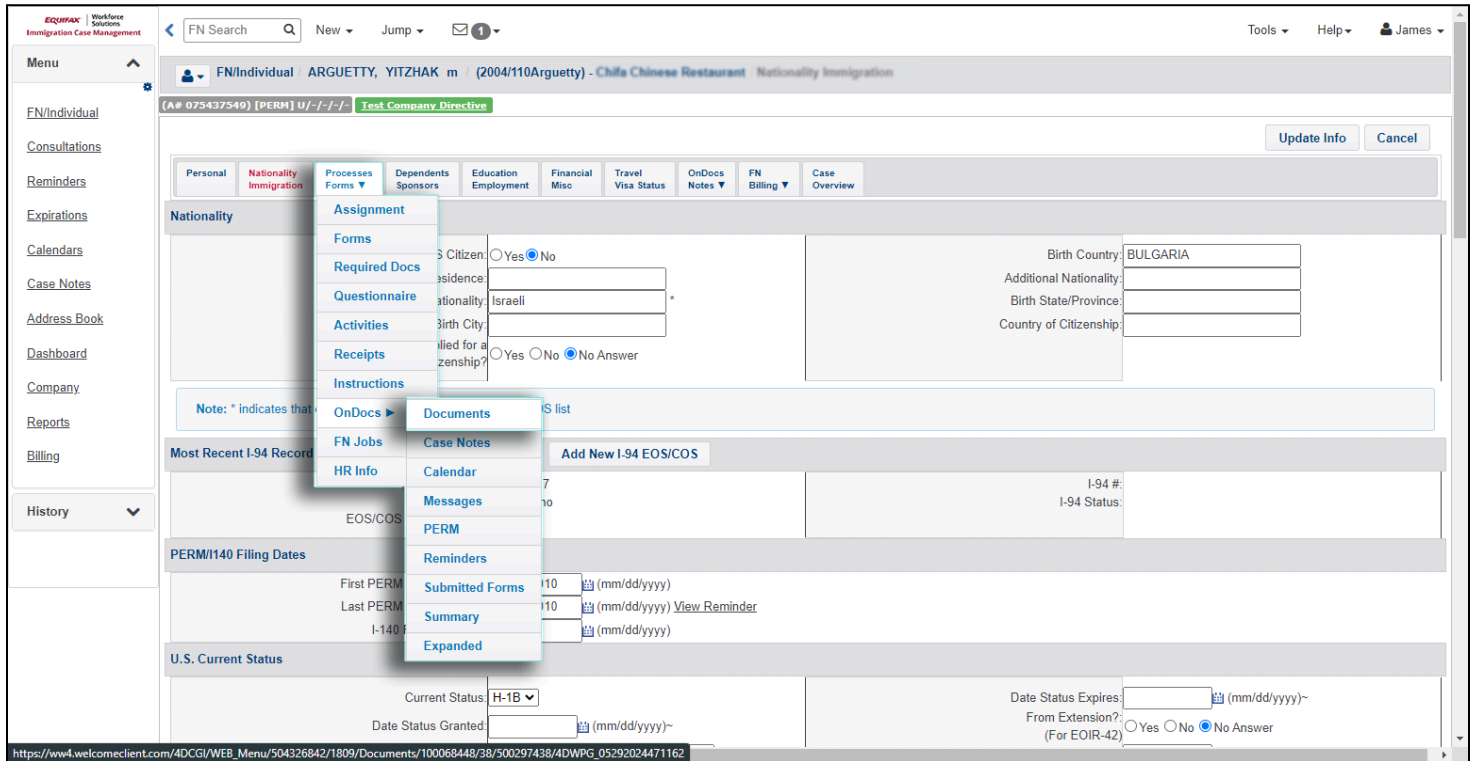
Creating a process specific Zip file:

- First Navigate to a client file and open the specific Process.
- Navigate to the Process level Ondocs, Documents subfolder
- Locate “Zip Ondocs for Download” button
- Click on the “Zip OnDocs for Download” button
- This will deliver a message letting you know the zip file is being created.
- Once completed the zip file will be placed in the Main OnDocs folder
 - Please Note: We will soon be modifying this behavior so that the new zip document will be linked to the matter from which it originated.

Visual Explanation:

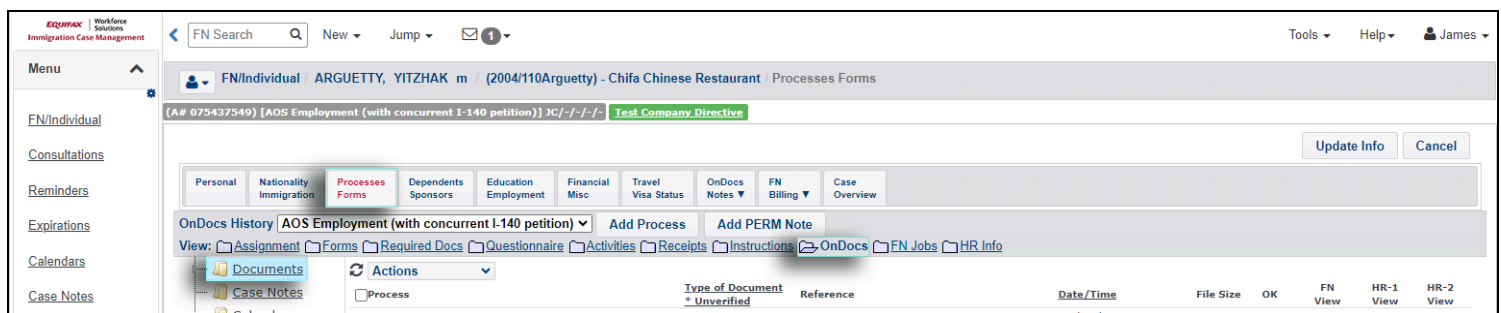
Immigration Case Management

- Access the Client File and navigate to the Process level Ondocs/Documents subfolder



The screenshot shows the EQUIFAX Workforce Solutions Immigration Case Management interface. The top navigation bar includes a search bar, 'New', 'Jump', and user information. The left sidebar contains a 'Menu' with options like 'FN/Individual', 'Consultations', 'Reminders', 'Expirations', 'Calendars', 'Case Notes', 'Address Book', 'Dashboard', 'Company', 'Reports', 'Billing', and 'History'. The main content area displays a case for 'ARGUETTY, YITZHAK m' (2004/110Arguety) - Chifa Chinese Restaurant. A dropdown menu is open under the 'OnDocs' tab, showing options: 'Assignment', 'Forms', 'Required Docs', 'Questionnaire', 'Activities', 'Receipts', 'Instructions', 'OnDocs', 'Documents', 'FN Jobs', 'Case Notes', 'Calendar', 'Messages', 'PERM', 'Reminders', 'Submitted Forms', 'Summary', and 'Expanded'. The 'Documents' option is highlighted. The background shows various form fields for personal information, nationality, and employment details.

- Location of Process Level OnDocs folder



The screenshot shows the EQUIFAX Workforce Solutions Immigration Case Management interface. The top navigation bar includes a search bar, 'New', 'Jump', and user information. The left sidebar contains a 'Menu' with options like 'FN/Individual', 'Consultations', 'Reminders', 'Expirations', 'Calendars', 'Case Notes', 'Address Book', 'Dashboard', 'Company', 'Reports', 'Billing', and 'History'. The main content area displays a case for 'ARGUETTY, YITZHAK m' (2004/110Arguety) - Chifa Chinese Restaurant. The 'OnDocs' tab is selected, and the 'Documents' folder is highlighted. The background shows various form fields for personal information, nationality, and employment details.

Immigration Case Management

- From within your chosen process, locate “Zip Ondocs for Download” button, Click on the “Zip Ondocs for Download” button

| | | | | | | | | |
|--|--|--|---|------------------------|-----------|---|---|---|
| Billing | Upload Document | <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) File: MS Word | Joshua.doc | 01/21/2015 09:03:44 | 22.01 KB | x | x | x |
| History | Send Message | <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) * File: MS Word | Each indicator Responsibility Matrix.docx | 01/14/2015 10:54:17 | 12.84 KB | x | x | |
| | View/Print Notes/Email History | <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) PDF | PDF Locked Questionnaire Set I | 06/21/2011 08:04:39 | 161.87 KB | x | | |
| | Zip Ondocs For Download | Total Size 1,664.4 KB | | | | | | |
| AMF Info: Size: 3,156.79 KB Max: 6,812.41 KB Date: 05/07/2024 | | Records 1 - 7 Displayed of 7 | | | | | | |
| Update Info Cancel | | | | | | | | |

- A message will be displayed indicating that the file is being generated. The system will generate a zip file containing only documents linked to the selected process and any document linked to “All” processes.

FN/Individual ARGUETTY, YITZHAK m (2004/110Arguetty) - Chifa Chinese Restaurant Processes Forms

Please refresh the page in a few moments, downloadable zip will be saved to Unfiled.

OnDocs History: AOS Employment (with concurrent I-140 petition) Add Process Add PERM Note

View: ☐ Assignments ☐ Forms ☐ Required Docs ☐ Questionnaire ☐ Activities ☐ Receipts ☐ Instructions ☐ OnDocs ☐ FN Jobs ☐ HR Info

| Documents | Actions | Type of Document | Reference | Date/Time | File Size | OK | FN View | HR-1 View | HR-2 View |
|--|-------------------------------------|------------------|---|------------------------|----------------------------|----|---------|-----------|-----------|
| <input type="checkbox"/> Process | <input type="checkbox"/> Unverified | | | | | | | | |
| <input type="checkbox"/> All | * File: Adobe Acrobat | | G-28 Table of Changes.pdf | 01/28/2015 10:14:48 | 180.47 KB | x | x | | |
| <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) PDF | | | G-28.pdf | 01/28/2015 09:41:37 | 453.04 KB | x | | | |
| <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) PDF | | | i-765.pdf | 01/28/2015 08:55:13 | 63.01 KB | x | x | x | |
| <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) File: MS Word | | | Joshua.doc | 01/21/2015 09:03:44 | 22.01 KB | x | x | x | |
| <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) * File: MS Word | | | Each indicator Responsibility Matrix.docx | 01/14/2015 10:54:17 | 12.84 KB | x | x | | |
| <input type="checkbox"/> AOS Employment (with concurrent I-140 petition) PDF | | | PDF Locked Questionnaire Set I | 06/21/2011 08:04:39 | 161.87 KB | x | | | |
| | | | | | Total Size 893.2 KB | | | | |
| Records 1 - 6 Displayed of 6 | | | | | | | | | |
| Update Info Cancel | | | | | | | | | |

AMF Info:
Size: 2,385.63 KB
Max: 6,812.41 KB
Date: 05/07/2024

Immigration Case Management

- Once completed a downloadable zip file will be loaded into the client record.

FN/Individual / ARGUETTY, YITZHAK m / (2004/110Arguetty) - Chifa Chinese Restaurant / Processes Forms

(A# 075437549) [AOS Employment (with concurrent I-140 petition)] JC/-/-/-/- Test Company Directive

Update Info Cancel

Please refresh the page in a few moments, downloadable zip will be saved to Unfiled.

Personal Nationality Immigration **Processes Forms** Dependents Sponsors Education Employment Financial Misc Travel Visa Status OnDocs Notes FN Billing Case Overview

OnDocs History [AOS Employment (with concurrent I-140 petition)] Add Process Add PERM Note

View: Assignment Forms Required Docs Questionnaire Activities Receipts Instructions OnDocs FN Jobs HR Info

Documents Case Notes Calendar Messages

Actions

| Type of Document | Reference | Date/Time | File Size | OK | FN | HR-1 | HR-2 |
|------------------|------------------|---------------------|-----------|----|----|------|------|
| Zip | Downloadable Zip | 05/29/2024 12:14:38 | 771.16 KB | | | | |

- Click on the document to access the downloadable zip file and save it to your preferred location

FN Search New Jump 1 Tools Help James

FN/Individual / ARGUETTY, YITZHAK m / (2004/110Arguetty) - Chifa Chinese Restaurant

(AOS Employment (with concurrent I-140 petition)] JC/-/-/-/- Test Company Directive

Update Info Cancel

OnDocs Zip

Document Location: Documents

Process: All

File Name: All_OnDocs_5_29_2024-12_14_35.zip

Original File Name: OnDocs_Zip.zip

Date Captured: 05/29/2024

Received From:

Time Captured: 12:14:38 Pacific(DST)

Your Reference: Downloadable Zip

Document Associations: Required Docs
Advertising
Affidavit from Relative
Affidavit of Support

Download Document
771.16 KB
Download File

To save this file to your computer:
Windows Users: Right Click the link above and select "Save Target As..." from the popup menu.
Mac Users: Right Click or Option Click the Link above and select "Download Linked File" from the popup menu.

Not an Image File

- The downloaded zip file, once extracted, will contain the process specific documents and those docs associated with "All" processes from the client file.

Extract All_OnDocs_5_29_2024-09_58_44

File Home Share View Compressed Folder Tools

Documents Pictures Computer Name: ATL100000840231
n400 doc Prodacc API-USCIS
TestDocs PS RTF

Extract To

< > << Downloads > OnDocs_Zip (5).zip > All_OnDocs_5_29_2024-09_58_44 Search All_OnDocs_5_29_2024-09_58_44

| Name | Type | Compressed size | Password ... | Size | Ratio | Date modified |
|---------------------------------------|------------------------------|-----------------|--------------|--------|-------|-------------------|
| 1. PDF_Locked_Questionnaire_Set_I... | Adobe Acrobat Document | 156 KB | No | 162 KB | 4% | 5/29/2024 9:58 AM |
| 2. Each_indicator_Responsibility_M... | Microsoft Word Document | 11 KB | No | 13 KB | 22% | 5/29/2024 9:58 AM |
| 3. Joshua.doc | Microsoft Word 97 - 2003 ... | 5 KB | No | 22 KB | 78% | 5/29/2024 9:58 AM |
| 4. i-765.pdf | Adobe Acrobat Document | 48 KB | No | 62 KB | 23% | 5/29/2024 9:58 AM |
| 5. G-28.pdf | Adobe Acrobat Document | 389 KB | No | 443 KB | 13% | 5/29/2024 9:58 AM |
| 6. G-28_Table_of_Changes.pdf | Adobe Acrobat Document | 163 KB | No | 181 KB | 10% | 5/29/2024 9:58 AM |