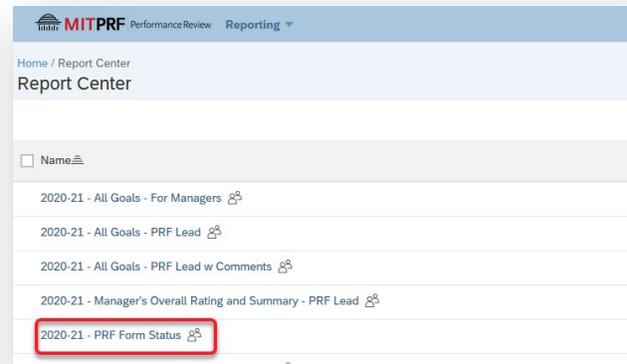


## What is Mass Form Routing?

The **Route Form** Admin Tool, which is commonly used to route a single form back to a previous step or to advance it forward, can also be used to route multiple forms at once. NOTE: When you route multiple forms at once, you can only move 1 step forward, 1 step backwards or to the **Completed** step, unlike routing a single form where you can route to any step. To route multiple forms more than 1 step (*Goal Setting to Manager Overall Rating*, for example), you must go through this process more than once.

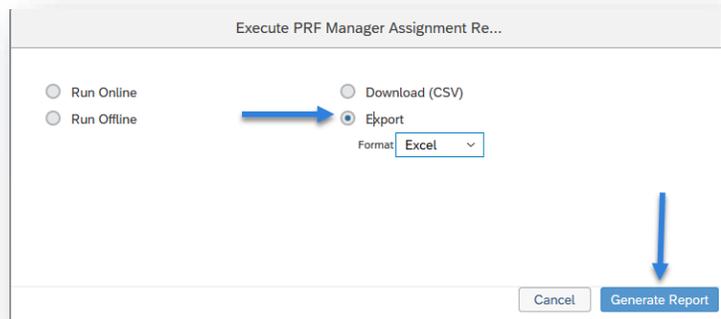
## How to Route Multiple Forms at Once

**Step 1: Generate a list of “Document IDs”** From the PRF Home Page, select **Reporting** from the *Home* drop down menu. Launch the “202x – 2x PRF Form Status” report. (Choosing the appropriate year).



## Step 2: Export the report to Excel

Choose “Export” and select “Excel”. Click “Generate Report”. Your report will open in Excel.



## Step 3: Prepare List of Forms to Mass Route

1. Delete the rows containing the forms that you **do not** want to route, leaving only the forms that you want to route. **Since you can only move all forms forward or backward 1 step at a time (unless moving all forms to the “Completed” step) it is recommended that you perform mass routing one step at a time.** For example, route only the forms in the “Goal Setting” step first, then all the forms in the “Employee Self-Assessment” and so on.
2. Delete all columns, except the column named Document ID.
3. Rename the **Document ID** column heading to **Form ID**. (See a before and after screenshot on next page)
4. Save the file as a CSV (Comma delimited) file. (You will receive an error if you save it in Excel (.xlsx) format).
5. Name the file and save it somewhere you can easily access it.

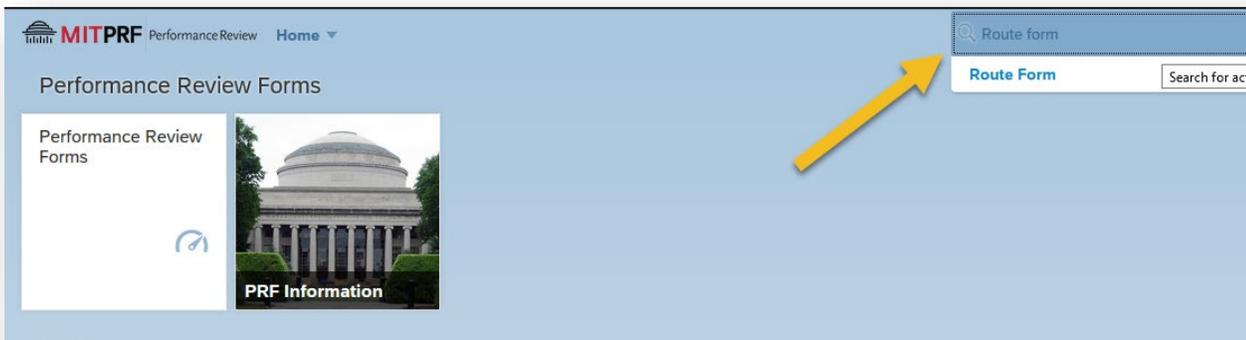
Before

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O		
1	Employee	Employee	Employee	Status	Current Ro	Form Temp	Employee	Manager	La	Manager	Fi	Employee	Employee	Employee	Form Due	Employee	Document ID
2	916484975	Smith	John	Completed		2020-21 Per	Support St	Adams	Joan	VPF - Offic	VPF - Offic	EVPT - VP	f 7/1/2021	jsmith	21894		

After

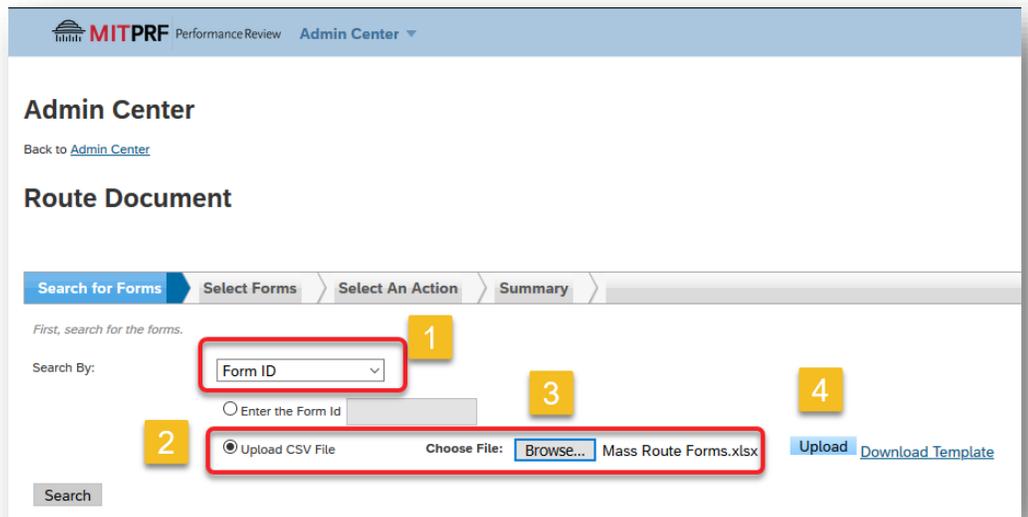
	A
1	Form ID
2	21894
3	21912
4	23632
5	21910
6	22019
7	22067
8	22222
9	21997

**Step 4: Open the Route Form Admin tool** There are several ways to get into the Route Form Admin Tool. The simplest way is to type *Route Form* in the search box at the top right corner.



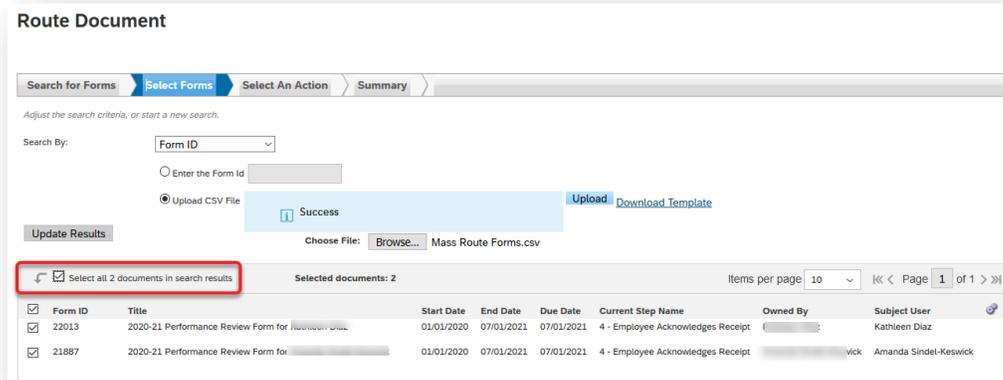
**Step 5: Upload CSV File**

- 1) Choose **Form ID**
- 2) Choose *Upload CSV File*
- 3) Click **Browse** and select the CSV file that you just created.
- 4) Click Upload.



### Step 6: Verify the Forms

Verify that the forms that you want to route are now being displayed. Once verified, select all the forms at once by clicking the “Select all x documents...” checkbox. To route the forms, click Next at the bottom right hand corner of the screen.



### Step 7: Route the Forms

- 1) Choose whether to move the form forward one step, back one step or to the *Completed* step.
- 2) Select *Skip step to continue the process*.
- 3) Add a short comment, explaining why the form is being routed. The comment will appear on the form route map.
- 4) Check off *Do not send document routing notification*, unless you want an email to be sent out to the employee or manager (depending on the step you route to).
- 5) Click Next to route the forms.

If successful, the next screen will display the message *You have successfully routed the forms*. A summary of the forms routed will also appear. The forms will now be routed immediately.

