

User Guide Administrators

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1.0 Getting Started

Access webonboarding at <https://my.webonboarding.com/#/login>

You can paste this link into your browser, and then bookmark it so you're only one click away from accessing your account.

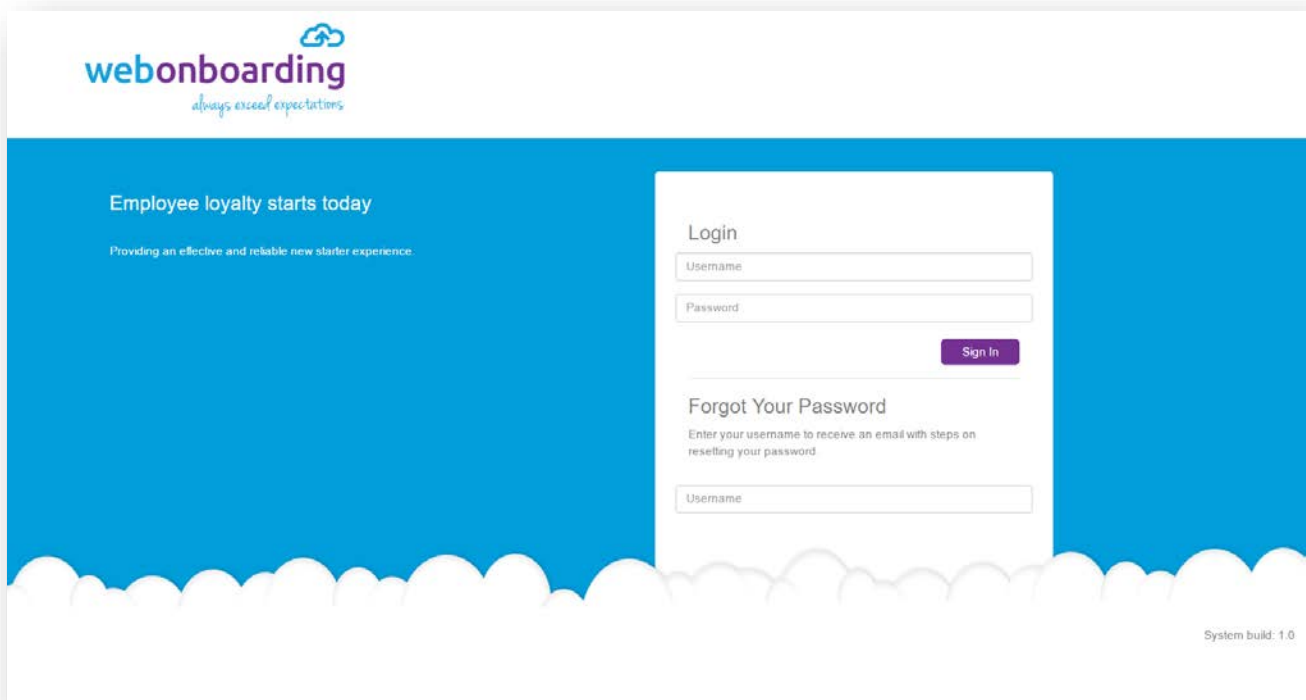


Figure 1.0.1

2.0 Setting Up and Administration

2.1 Administration

2.1.1 Account

The Account is your **Header Company**. This is your organisation.

- 1 From the **Dashboard Tiles**, navigate to Administration **1**
- 2 Click, on **Account** **2**

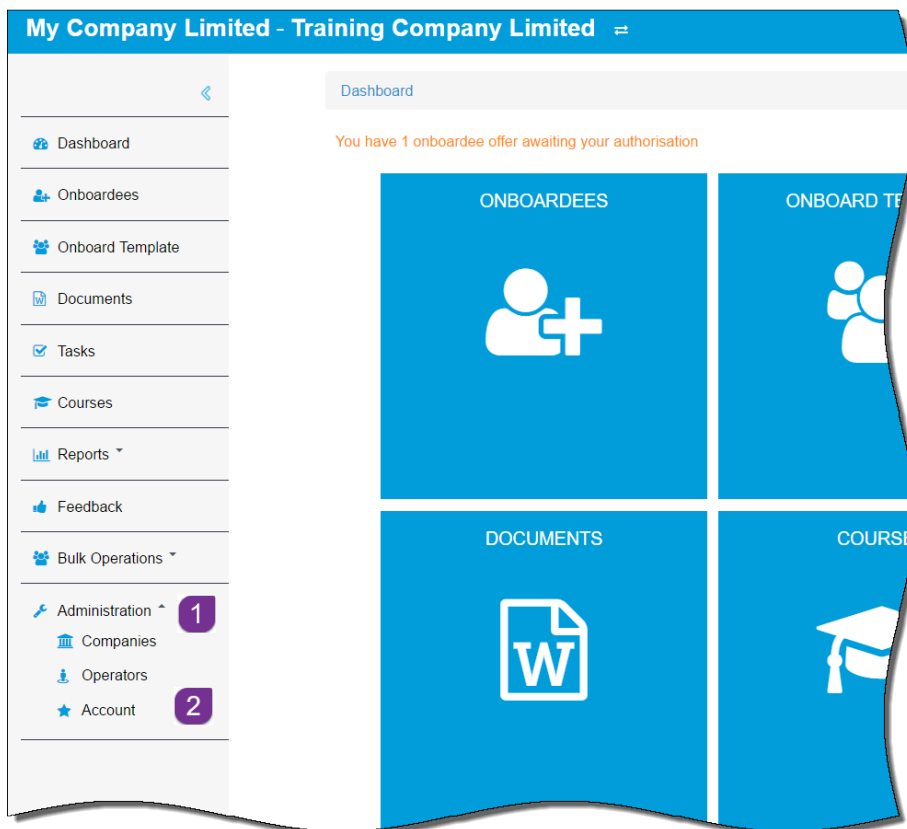


Figure 2.1.1.1

- 3 Click, on the **Account Reference** to view more information **3**

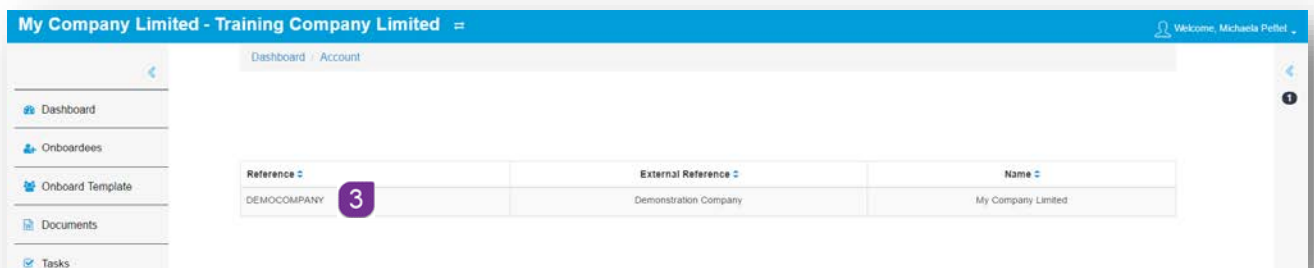



Figure 2.1.1.2

When you have clicked on the **Account Reference**, you will see three tabs.

2.1.2 General

The screenshot shows a web form for editing account reference information. At the top left, there is a blue 'Edit' button. Below it, there are three tabs: 'General' (highlighted with a purple '1'), 'External Training Provider', and 'Email Templates'. The form is organized into sections: 'Reference' with 'Reference*' and 'External Reference' fields; 'Name' with a 'Name*' field; 'Default HR Contact' with 'Email' and 'Telephone' fields; 'Document Date Format' with a 'Date Format' dropdown menu (highlighted with a purple '2'); and 'Additional' with a 'Notes' text area. A 'Back' button is located at the bottom left.

Figure 2.1.2.1

- 1 The **General** tab holds your account information and shows your organisations details **1**
- 2 Click  to make any changes to this information
- 3 Click on the **Date Format** drop down menu **2** to set the format of dates in documents eg. dd/mm/yyyy

The screenshot shows a dropdown menu for 'Date Format'. The menu is open, displaying several options: 'dd/mm/yyyy (21/07/2010)', 'mm/dd/yyyy (07/21/2010)', 'yyyy-mm-dd (2010-07-21)', 'dd mmmm yyyy (21 July 2010)', and 'dd.mm.yyyy (21.07.2010)'. Below the dropdown, there is a 'Notes' section.

Figure 2.1.2.2

2.1.3 External Training Provider

- 1 Move to the **External Training Provider** ³ tab to enter the details, of your link to an external training provider

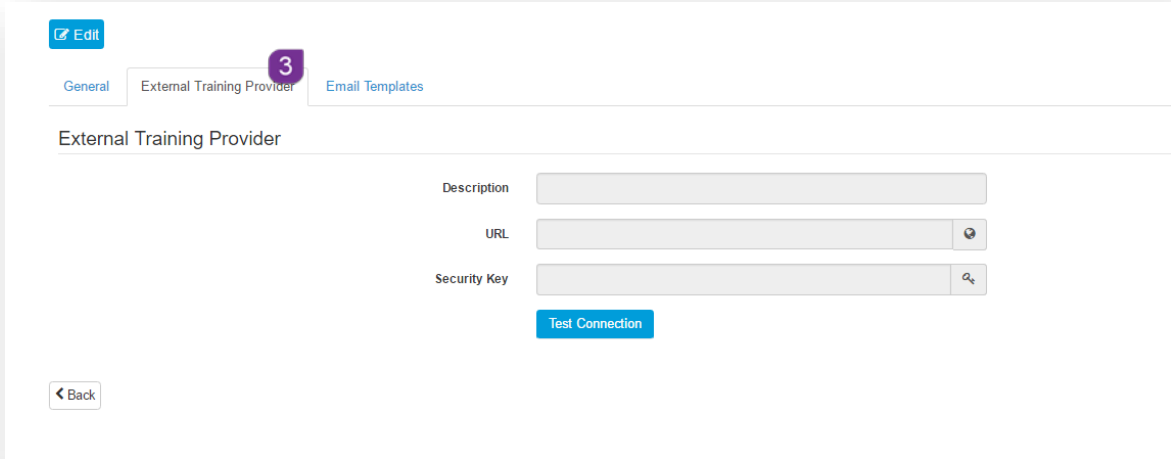


Figure 2.1.3.1

2.1.4 Email Templates

- 2 The **Email Templates** ⁴ tab is a section where you can customise automated emails with your house font, logo and own wording. See section 10.0 for more information on this

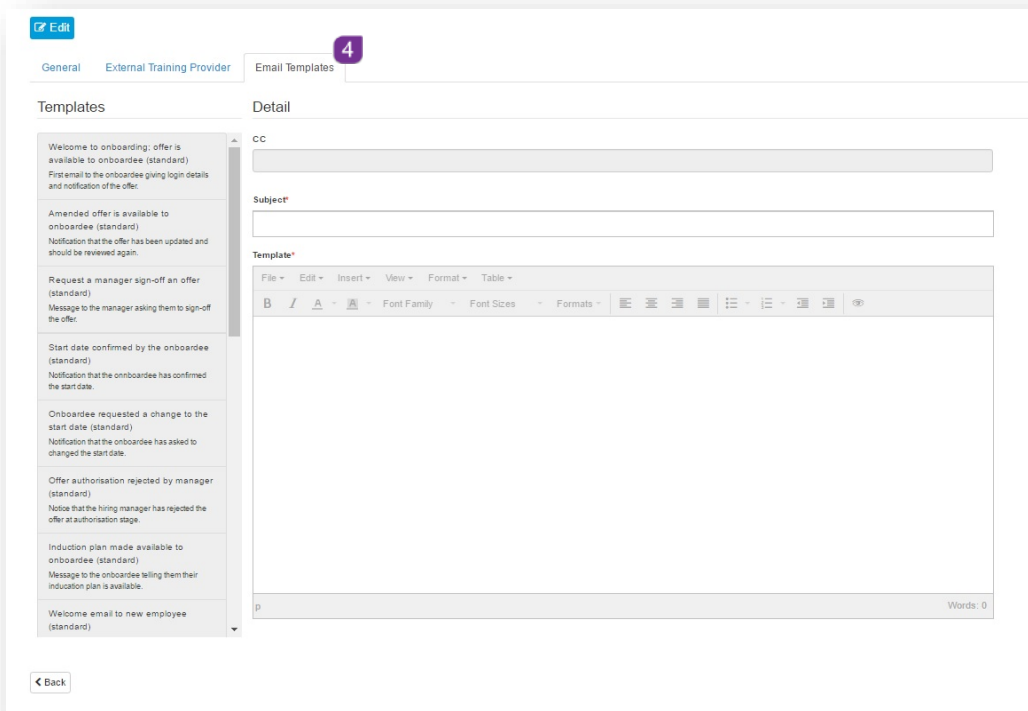












Figure 2.1.4.1

2.2 Companies

The company section is where you create the **company** or **companies** that you manage recruitment on behalf of. Once your company(s) are completed **Documents** and **Onboarder Templates** can be linked to them. You can add more companies as and when required.

2.2.1 How to Create a Company

- 1 From the **Dashboard** tiles or **Menu**, navigate to **Administration**
- 2 Click, **Companies**
- 3 Click,  button
- 4 In the **General** tab, enter a **Reference**  for the company
- 5 Enter the **Name**  of the company
- 6 Enter a **Description**  if desired
- 7 Ensure that the **Active**  box is ticked
- 8 Enter the contact details for **HR** 
- 9 Click on the **Date Format** drop down menu to set the format of dates in documents eg. dd/mm/yyyy 
- 10 If you would like Onboarders to have the option to request a new start date, ensure that the **Request Alternative Start Date** box is ticked 
- 11 The **Account Name** field will populate with the **Header Company** name once the record has been saved 
- 12 Select the **Address** tab and enter the company address
- 13 Click,  to keep your changes
- 14 Repeat from **step 3** to create another company record if you manage recruitment for multiple companies

+ Add Edit

General Address

Name

Reference* CLOUD 1

Name* Cloud Contact 2

Description 3

Status

Active 4

Default HR Contact

Email webonboarding.training@gmail.com 5

Telephone 01993123455

Document Date Format

Date Format dd/mm/yyyy (21/07/2010) 6

Request Alternative Start Date

Allow 7

Account

Account Name WOB Account 9 - Michaela Pettet 8


< Back

Figure 2.2.1.1

Once you have saved the new company, click on the details in the list.

Reference	Name	Account	Action
WOB Account 9 - Michaela Pettet	WOB Account 9 - Michaela Pettet	WOB Account 9 - Michaela Pettet	
CLOUD	Cloud Contact	WOB Account 9 - Michaela Pettet	

Figure 2.2.1.2

 **Note:** The **Reference** 1 and the **Name** field 2 are mandatory(*) The **Name** is what you will see in the **header bar** of your **webonboarding system**.

A third tab will now be visible called **Email Templates**.

2.2.2 Email Templates

The **Email Templates** tab is a section where you can customise automated emails with your house font, logo and own wording.

Any changes made to the emails at this level, will take precedence over the equivalent template at **Account** level.

See section **10.0** for more information on this.

2.2.3 Accessing Each Company

Once your **Companies** have been created, you can switch in to them and work directly under that company header. Onboarder templates and documents can be company specific or shared between companies.

2.2.4 To Switch in to a Different Company

- 1 From the Dashboard or Menu, navigate to Administration
- 2 Click, Companies
- 3 Navigate to the company in the list, that you want to switch in to
- 4 Click on the **Switch Account** **1** button at the end of the row of **Company** details, in the **Action Column**



Reference	Name	Account	Action
TRAINCOMPANY	Training Company Limited	My Company Limited	 1
Holiday Camps UK	Holiday Camps UK	My Company Limited	
CLC	Cloud Contact	My Company Limited	

Figure 2.2.4.1

- 5 Confirm with **Yes** that you want to switch
- 6 You will now see the **Company** name in the **Header Bar**, next to the **Account** name

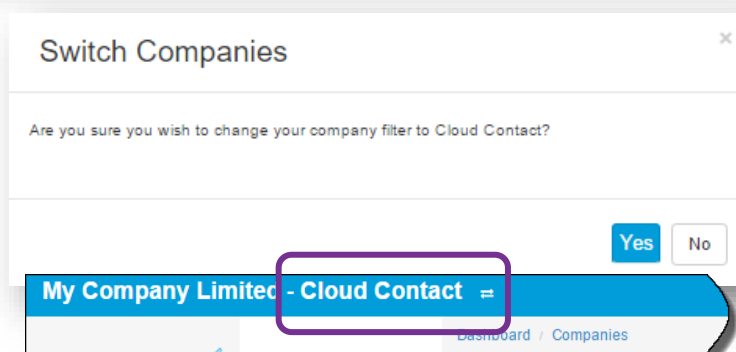


Figure 2.2.4.2

2.3 Operators

Operators are the accounts users of webonboarding. Operators can be set with different access levels depending on their position in the recruitment structure.

2.3.1 How to Create Operators

- 1 From the **Dashboard** or **Menu**, navigate to **Administration**
- 2 Click, **Operators**
- 3 Click, **+ Add Operator** button
- 4 In the **General** tab, enter the **details** of the **Operator** **1**



The screenshot shows a web application interface for creating a new operator. The page title is 'My Company Limited - Cloud Contact' and the breadcrumb is 'Dashboard - Operators - New Operator'. There are three tabs: 'General', 'Security', and 'Companies'. The 'General' tab is selected. The form contains the following fields and checkboxes:

- Name:** Forename* (1), Surname*, Email*
- Credentials:** Username* (2), Password* (3), Force Password Change (checked) (4)
- Status:** Active (checked) (5)
- Account:** Account Name (My Company Limited)

At the bottom, there are 'Back' and 'Save' buttons.

Figure 2.3.1.1

- 5 Create a **User Name** **2** – this is what the Operator will use to log in to webonboarding
- 6 Create a **Password** **3**. Password should be a minimum of 8 characters long and a mixture of upper case and lower case characters
- 7 Ensure that the box labelled **Force Password Reset** **4** is ticked. (This will force the operator to change their password the first time they log in)
- 8 Ensure that the **Active box** **5** is ticked, this ensures that the Operator is able to log on to their account, untick this box to revoke access
- 9 Select the **Security** tab to provide the level of access for this operator

- 10 Select the relevant **Role** for the operator and click on  to assign individual roles to the selected section. Alternatively, click on  to apply all roles or double click on the role to assign.

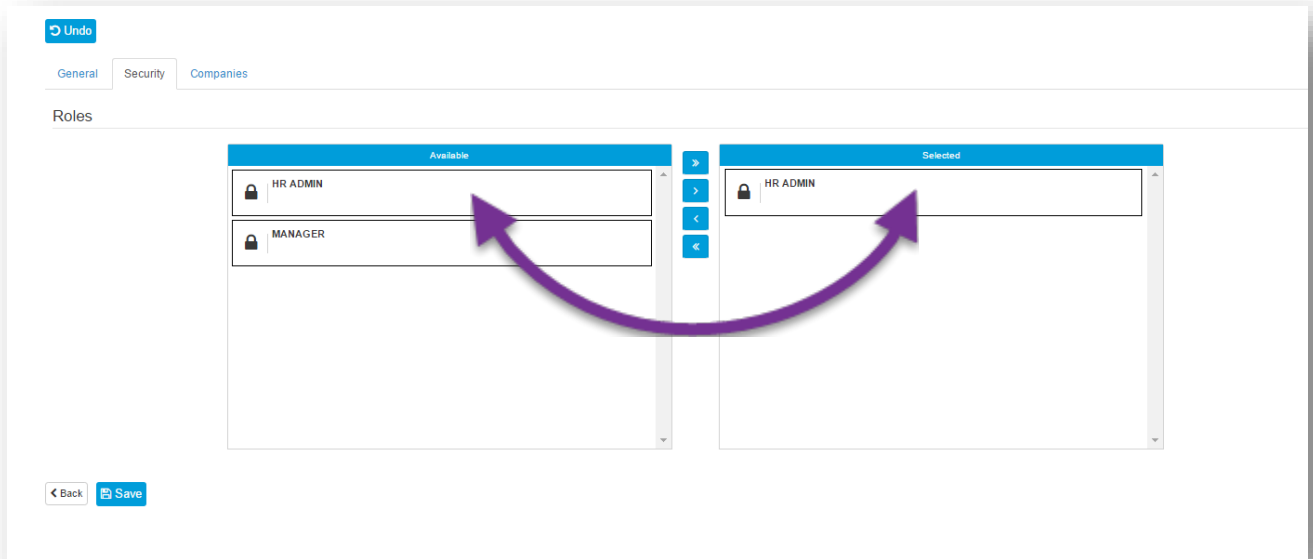
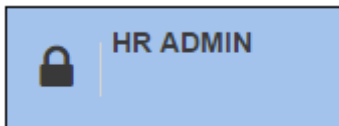
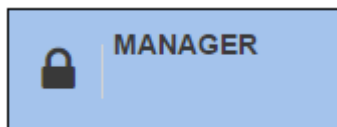


Figure 2.3.1.2



This level of access will give the operator full read, add and edit access to the webonboarding account.



This level of access will give the operator read only access to **Onboarder** details and **Feedback**. **Tasks** that have been assigned to the **Manager** can also be completed.

- 11 Once the security level has been applied, select the **Companies** tab. You will see a list of all of the companies that you created at step 2.2.1

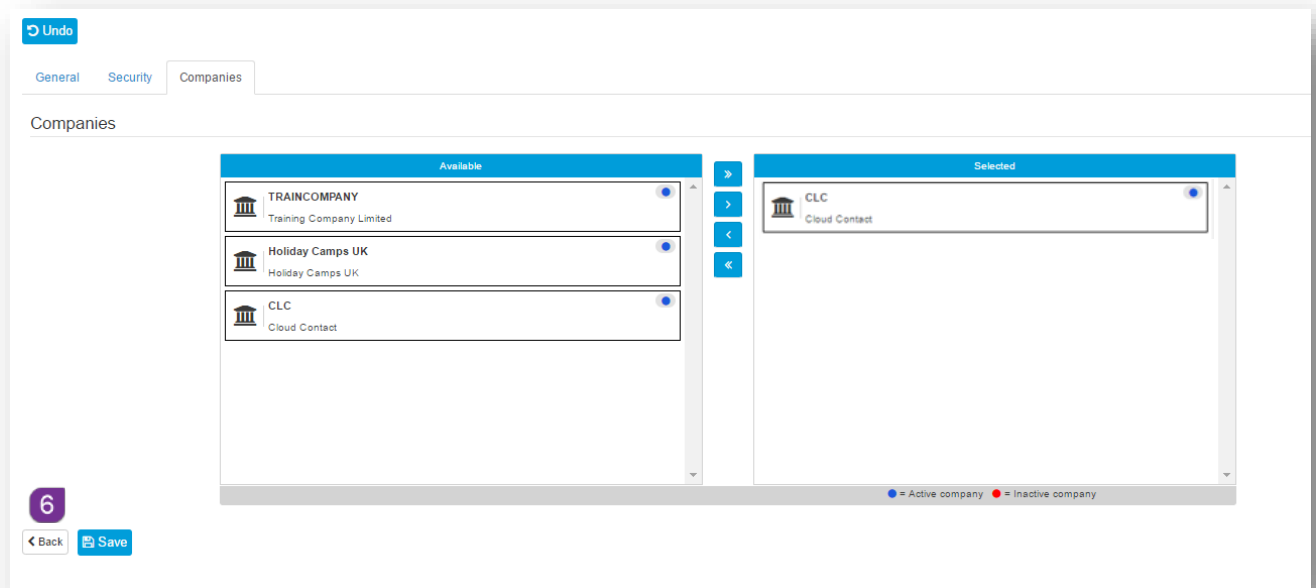






Figure 2.3.1.3

- 12 Select the relevant **Company** that you want the **Operator** to have access to, click on  to assign. Click on  to assign access to all companies.
- 13 Click,  to keep your changes
- 14 Click on the **Back**  button at the bottom of the screen, or **Operators** in the menu to view a list of all **Operators**

3.0 Documents

Any documents that are relevant to your recruitment process can be uploaded to the **Document** section of the menu, as preparation to attach to your **Onboard Templates**.

There are four document types, these are:

- Contract
- Offer Letter
- Exchange Document
- Reading List Item

Contract	Offer Letter	Exchange Document	Reading List Item
<p>The contract of employment which is issued to all employees regardless of employment status.</p> <p>Some organisations will have a different contract for managers or directors than for employees.</p> <p>The contract will be signed by the hiring organisation and by the Onboarder.</p>	<p>The formal offer of employment which usually follows a verbal offer and which accompanies the contract of employment.</p> <p>The letter will be signed by the organisation. There is usually no requirement for the Onboarder to sign this, they will sign the contract.</p>	<p>1. A document which you send to the Onboarder to complete and return.</p> <p>E.g.</p> <p>Confidential Medical Questionnaire</p> <p>HMRC checklist</p> <p>2. A document which you want the Onboarder to provide you with.</p> <p>E.g.</p> <p>Copy of driving licence</p> <p>Copy of Passport</p> <p>Copy of Birth Certificate</p>	<p>A document which you provide to the Onboarder to read as part of their induction or on pre-joining.</p> <p>E.g.</p> <p>A policy document or some other document which is required of the Onboarder by the company.</p>

3.1 How to Add Documents

- 1 From the **Dashboard** or **Menu**, navigate to **Documents**
- 2 Click, **Documents**
- 3 Click, **+ Add Document** button

The screenshot shows a web form for adding a document. At the top left is an 'Undo' button. Below it are two tabs: 'General' (selected) and 'Companies'. The form is divided into sections: 'General', 'Attachment', 'Status', and 'Account'. In the 'General' section, there are three input fields: 'Reference*' with the value 'CON1', 'Description*' with the value 'Contract', and 'Document Type*' with a dropdown menu set to 'Contract'. Below these is a blue hyperlink 'Show Merge Field Dictionary'. In the 'Attachment' section, there is an 'Attachment Type' dropdown set to 'Document' and a 'File' field with a 'Choose File' button and the text 'No file chosen'. In the 'Status' section, there is an 'Active' checkbox that is checked. In the 'Account' section, there is a 'System Account Name' input field. At the bottom left are 'Back' and 'Save' buttons. Numbered callouts (1-7) are placed over the form elements: 1 on the Reference field, 2 on the Description field, 3 on the Document Type dropdown, 4 on the Show Merge Field Dictionary link, 5 on the Attachment Type dropdown, 6 on the File field, and 7 on the Active checkbox.

Figure 3.1.1

- 4 In the **General** tab enter a short **Reference** **1** for your document
- 5 In the **Description** field **2**, enter the name of the document
- 6 Select the document type from the **Document Type** **3** drop down menu
- 7 If **Contract** or **Offer Letter** are selected, you will be offered a hyperlink - **Show Merge Field Dictionary** **4**

- 8 Click on the hyperlink to access all of the **mail merge** fields that you can add to your template. Simply copy the relevant merge field and paste it into your **Contract** or **Letter**

This provides the list of available merge fields that can be used in the merge templates for contract and offer documents.

To merge a field into a contract or offer letter when the generate/authorisation process is run, add the placeholder in the word document where the value should be merged.

Field Name	Placeholder	Mandatory	Description
Generated Date and Time	[[generatedDateTime]]	false	The date and time the document was generated.
Title	[[title]]	false	The title of the onboardee
Forename	[[forename]]	true	The forename of the onboardee
Surname	[[surname]]	true	The surname of the onboardee
Address line 1	[[address.line1]]	false	The first line of the onboardee address.
Address line 2	[[address.line2]]	false	The second line of the onboardee address.
City	[[address.city]]	false	The city of the onboardee address.
Address county	[[address.county]]	false	The county of the onboardee address.
Address postcode	[[address.postcode]]	false	The postcode of the onboardee address.
Address country	[[address.country]]	false	The country of the onboardee address.

Total Items: 46

OK

Figure 3.1.2

- 9 The **Attachment Type** **5** will Change to **Document** if the **Document Type** is either **Contract** or **Offer Letter** and this can't be changed
- 10 Click, **Choose File** **6** and navigate to the relevant document and double click to select and upload
- 11 Ensure that the **Active box** **7** is ticked, this ensures that the new document is available for use

12 If **Exchange Document** or **Reading List Item** is selected as the **Document Type** **8**, then the screen will change



The screenshot shows a web form with the following fields and annotations:

- Reference***: Text input with value "CON1".
- Description***: Text input with value "Contract".
- Document Type***: Dropdown menu with "Exchange Document" selected. Annotated with **8**.
- Upload Only**: Checkbox, currently unchecked. Annotated with **9**.
- Mandatory**: Checkbox, currently unchecked.
- Attachment Type***: Dropdown menu with "Web-link" selected.
- Web Link**: Text input field. Annotated with **10**.
- Active**: Checkbox, currently checked. Annotated with **11**.
- System Account Name**: Text input field. Annotated with **12**.

Buttons: "Undo" (top left), "Back" (bottom left), "Save" (bottom right).

Figure 3.1.3

- 13** You can indicate if the document is to be **Uploaded** only by the **Onboarder** and/or **Mandatory** **9**. If it is not an **Upload** only document, then you can choose whether this is a **Document** or a **Web-Link**
- 14** If you select **Document** from the drop down menu, then click, **Choose File** and navigate to the relevant document and double click to select and upload
- 15** If **Web-Link** is selected, then enter the **URL** of the document into the field provided **10**
- 16** Ensure that the **Active** box **11** is ticked, this ensures that the new document is available for use
- 17** The field labelled **System Account Name** **12** will populate with your Organisation Account name once the record has been saved
- 18** Before being able to save, select the **Companies** tab
- 19** You will see a list of all of the companies that you created at step **2.2.1**

- 20 Select the relevant **Company** that you want to have access, to the **Document**, and click on  to assign. Alternatively, click on  to assign access for all companies

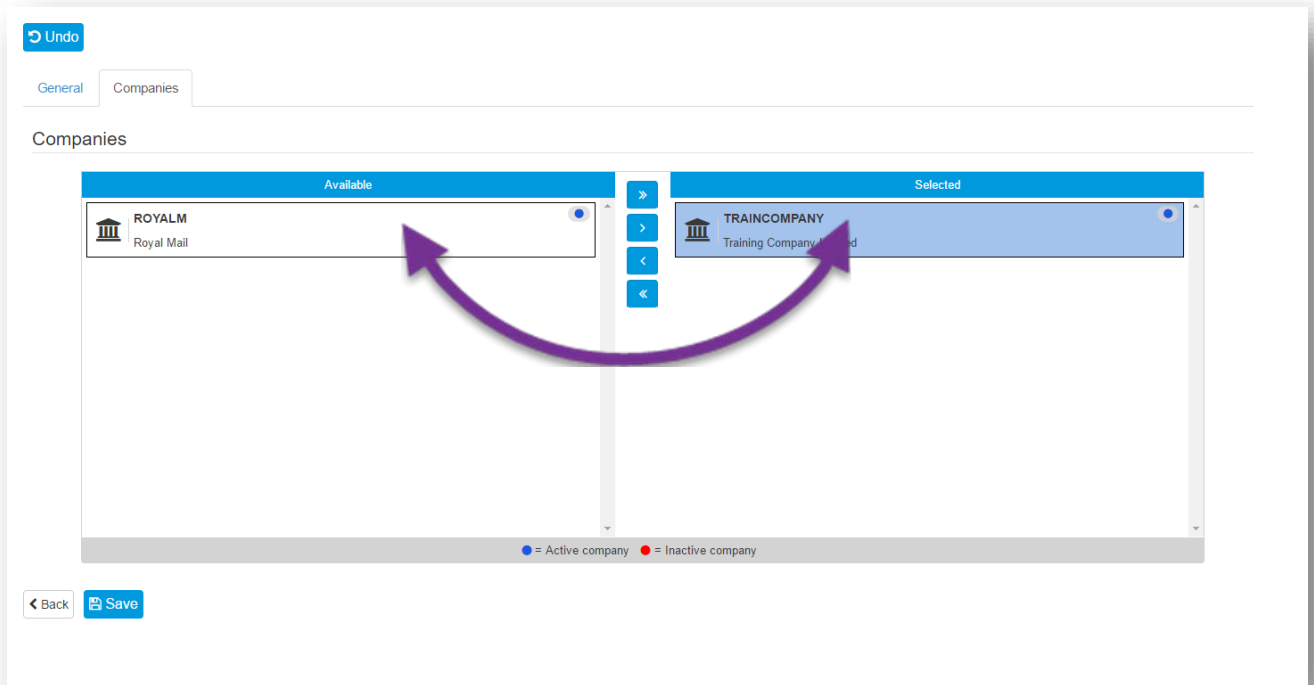



Figure 3.1.4

- 21 Click,  to keep the changes
- 22 Click, **Back** or on **Documents** in the menu to see a list of all documents, for your account

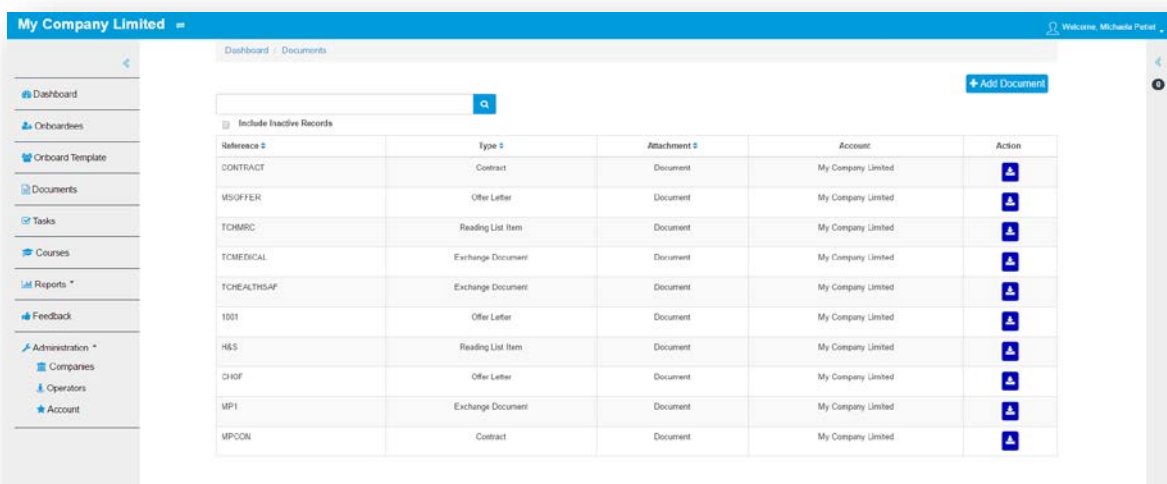


Figure 3.1.5

3.1.1 Contract

When a document type of Contract is selected, then the screen will change. Contracts have the ability for digital signing.

You can add additional signature fields ¹³, along with those for **Initials** and a **Date Signed** field ¹⁴

The screenshot displays the configuration interface for a Contract document type. It features several sections:

- General:** Includes fields for Reference, Description, and Document Type (set to Contract). A 'Show Merge Field Dictionary' link is also present.
- Attachment:** Includes an Attachment Type dropdown (set to Document) and a File upload area with a 'Choose File' button.
- Digital Signing Fields:** Contains a blue tooltip with instructions: 'Digital signing fields allow the signing portal to position the user input fields on the contract. Each signing field has a search term shown in blue. On each instance of the search word within the contract the relative input will be required. As a minimum each contract document requires a signature field. How to set the signing fields in edit mode: 1. Click on the blue text within the digital signing field. 2. Edit the search term to match the text at the location in the document. 3. Drag and drop the signing field placeholder (yellow box) to the desired position relative to the search term.' Below the tooltip is a 'Signature' field with a 'Sign' button and a 'Signed:' label. A yellow box placeholder is visible. Below this are buttons for '+ Add signature field' (13), '+ Add Initials Field', and '+ Add Date Signed Field' (14).
- Status:** Includes an 'Active' checkbox which is checked.
- Account:** Includes a 'System Account Name' field.

At the bottom left, there are 'Back' and 'Save' buttons.

Figure 3.1.6

4.0 Tasks





Tasks are actions that need to be completed prior to the Onboarder's joining date by either **HR** or the **Manager**. Tasks can be available for all Companies or individually selected companies. Once shared at company level, they can then be allocated to **the Onboard Template**.

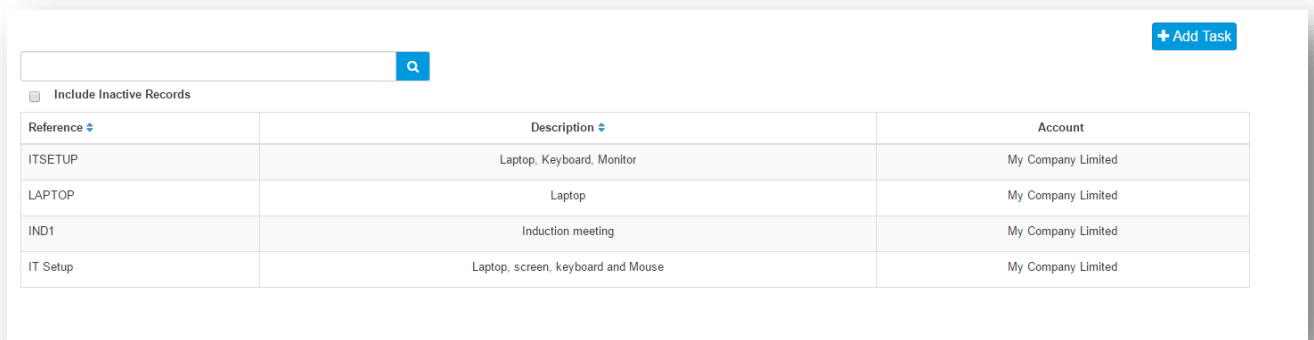
4.1 How to Create Tasks

- 1 From the **Dashboard or Menu**, navigate to **Tasks**
- 2 Click, **+ Add Task** button
- 3 In the **General** tab, enter a short **Reference** **1** and **Description** **2**
- 4 In the **Responsibility** section of the tab, set the level of **Importance** **3** by choosing **High, Medium** or **Low** from the drop down menu.
- 5 Add the **Time Frame** **4** for completion of the **Task**. This is the amount of **Days** prior to the **Onboarder's** start date.
- 6 Allocate **Who** is responsible and who owns the **Task** by selecting **Manager** or **HR** **5**

The screenshot shows a form for creating a task. At the top left is an 'Undo' button. Below it are tabs for 'General' and 'Companies'. The form is organized into sections: 'Name' with 'Reference*' (ITSETUP) and 'Description' (Laptop, Keyboard, Monitor); 'Responsibility' with 'Importance*' (High), 'Time Frame*' (5 days), and 'Owner*' (radio buttons for Manager and HR); 'Status' with an 'Active' checkbox; and 'Account' with 'System Account Name' (My Company Limited). At the bottom left are 'Back' and 'Save' buttons. Numbered callouts 1-6 are placed next to the Reference, Description, Importance, Time Frame, Owner, and Active fields respectively.

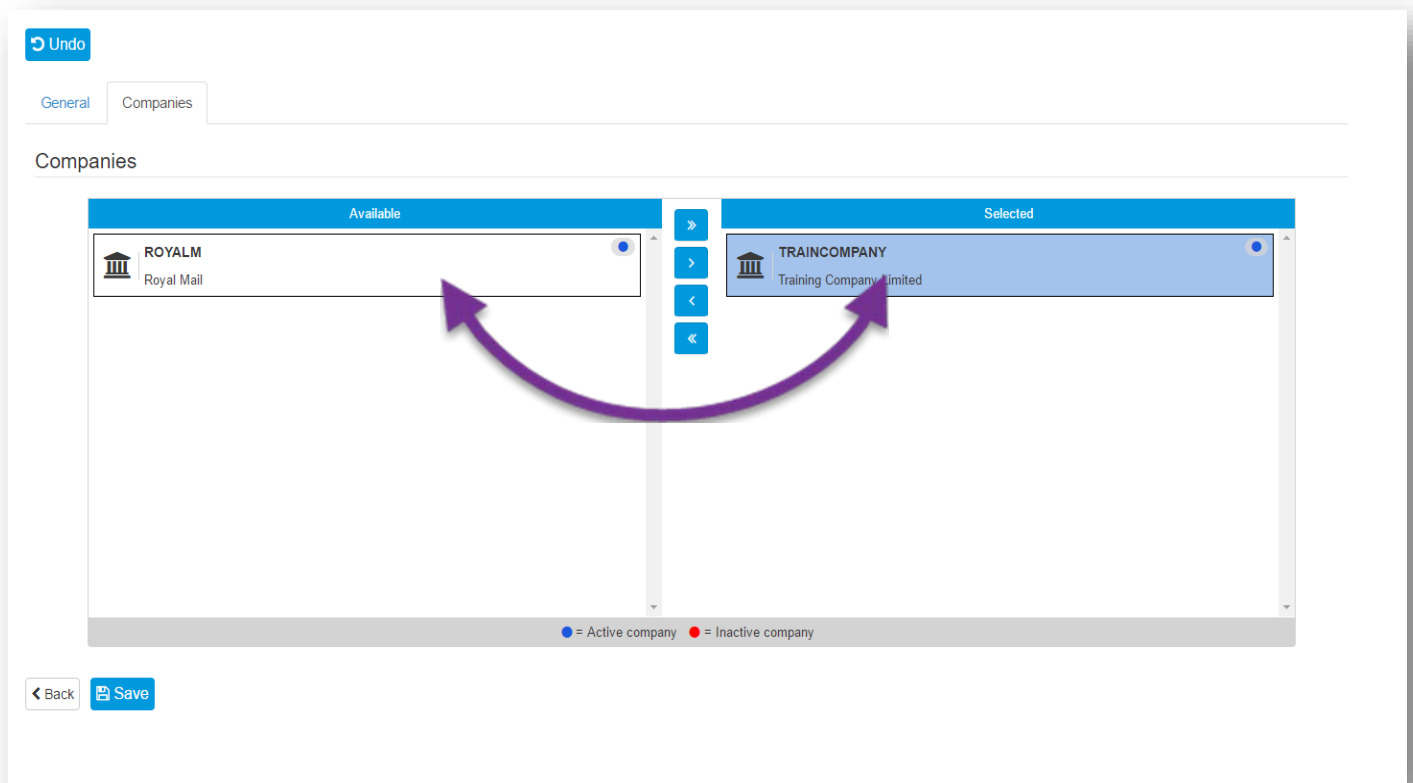
Figure 4.1.1

- 7 Ensure that the **Active**  box is ticked to be able to assign the task
- 8 Before being able to save, select the **Companies** tab
- 9 You will see a list of all of the companies that you created at step 2.2.1
- 10 Select the relevant **Company** that you want to have access to the **Task**, and click on  to assign. Alternatively, click on to  assign access for all companies
- 11 Click,  to keep the changes
- 12 Click, **Back** or on **Tasks** in the menu to see a list of all tasks, for your account



Reference	Description	Account
ITSETUP	Laptop, Keyboard, Monitor	My Company Limited
LAPTOP	Laptop	My Company Limited
IND1	Induction meeting	My Company Limited
IT Setup	Laptop, screen, keyboard and Mouse	My Company Limited

Figure 4.1.2



Companies

Available Selected

ROYALM
Royal Mail

TRAINCOMPANY
Training Company Limited

● = Active company ● = Inactive company

Back Save

Figure 4.1.3

5.0 Courses

All courses that are available for Onboardees can be set up in **Courses**. Courses can be linked to an external training provider via an API (this is configured at **Account** level). Once created, courses can be allocated to the **Onboard Template** and Onboardees can register their interest once a start date has been confirmed.

5.1 How to Create Courses

- 1 From the **Dashboard or Menu**, navigate to **Courses**
- 2 Click, **+ Add Course** button
- 3 In the **General** tab, enter a short **Reference** **1** and **Description** **2**
- 4 In the **Type** section of the tab, set the **Type** of course **3** by choosing:
 - **Self-Study**
 - **Online**
 - **Internal**
 - **External or**
 - **Residential** from the drop-down menu.

The screenshot shows a form for creating a course. At the top left, there is an 'Undo' button. Below it are two tabs: 'General' (selected) and 'Companies'. The form is divided into sections: 'Name', 'Type', 'Status', and 'Account'. In the 'Name' section, there are two text input fields: 'Reference*' (marked with a purple circle 1) and 'Description*' (marked with a purple circle 2). In the 'Type' section, there is a dropdown menu for 'Type*' (marked with a purple circle 3) and a checkbox for 'Verify via API' (marked with a purple circle 4). In the 'Status' section, there is a checkbox for 'Active' (marked with a purple circle 5). In the 'Account' section, there is a text input field for 'System Account Name' containing 'My Company Limited'. At the bottom left, there are two buttons: 'Back' and 'Save'.

Figure 5.1.1

- 5 If this Course is to be accessed via API, ensure that the **API** box **4** is ticked
- 6 Ensure that the **Active** **5** box is ticked to be able to assign the **Task**

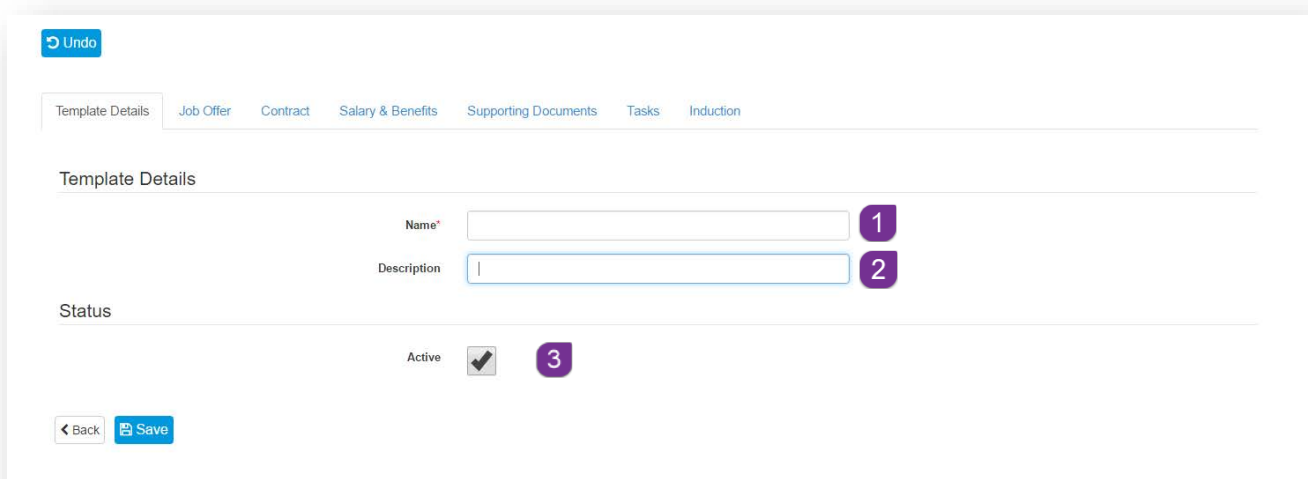
6.0 Onboard Template

The Onboard Template section is accessible once you have switched into a Company set up in your Account. This section is where you can create set templates for Job Roles and Positions that are recruited for. Once the template has been created, it can be used time and time again, as part of the Onboarding process. Information from the template will help populate many of the fields in the Onboarder record.

6.1 How to create an Onboard Template

6.1.1 Template Details

- 1 Switch in to the Company that you want to create the template for (see section 2.2.4)
- 2 From the Dashboard or Menu, navigate to Onboard Template
- 3 Click, **+ Add Onboard Template** button
- 4 In the Template Details tab, enter a Name **1** and Description **2**
- 5 Ensure that the Active **3** box is ticked to be able to assign the **Onboard Template**



The screenshot shows a web form for creating an Onboard Template. At the top left is an 'Undo' button. Below it is a horizontal menu with tabs: 'Template Details' (selected), 'Job Offer', 'Contract', 'Salary & Benefits', 'Supporting Documents', 'Tasks', and 'Induction'. The 'Template Details' section contains three main fields: 'Name*' with an input field and a purple callout '1'; 'Description' with an input field and a purple callout '2'; and 'Status' with an 'Active' checkbox checked and a purple callout '3'. At the bottom left are 'Back' and 'Save' buttons.

Figure 6.1.1.1


Job Offer

- 1 Select the **Job Offer** tab
- 2 Select the **Offer Letter** template from the drop down menu **4**
- 3 Enter the **Job** details on the **Job Information** section **5**
- 4 Enter the Name and Job Title of the Reporting Manager **6**

The screenshot shows a web form for creating a job offer. At the top left is an 'Undo' button. Below it is a navigation bar with tabs: 'Template Details', 'Job Offer', 'Contract', 'Salary & Benefits', 'Supporting Documents', 'Tasks', and 'Induction'. The 'Job Offer' tab is active. The form is divided into three main sections: 'Offer Template', 'Job Information', and 'Reports To'. In the 'Offer Template' section, there is a dropdown menu labeled 'Offer Letter' with a purple circle containing the number '4' next to it. The 'Job Information' section contains five text input fields: 'Title', 'Description', 'Location', 'Department', and 'Division'. A purple bracket groups these five fields with a purple circle containing the number '5'. The 'Reports To' section contains three text input fields: 'Forename', 'Surname', and 'Job Title'. A purple circle containing the number '6' is placed to the right of the 'Surname' field. At the bottom left of the form are two buttons: '< Back' and 'Save'.

Figure 6.1.2.1

6.1.2 Contract

- 1 Select the **Contract** tab
- 2 Select the **Contract Template** ⁷ from the drop down menu
- 3 Select the **Contract Type** ⁸ from the drop down menu, the options are:
 - Full-time Permanent
 - Part-time Permanent
 - Full-time Temporary
 - Part-time Temporary
 - Fixed Term Contract
 - Casual
- 4 Enter the total number of **Weekly Hours** ⁹ in figures or  use the to select
- 5 Enter the details of the **Work Pattern** ¹⁰ e.g. Monday to Friday

The screenshot shows the 'Contract' tab in a web application. At the top, there is a navigation bar with tabs: 'Template Details', 'Job Offer', 'Contract' (selected), 'Salary & Benefits', 'Supporting Documents', 'Tasks', and 'Induction'. Below the navigation bar, the form is organized into sections:

- Contract Template:** A dropdown menu labeled 'Contract' with a purple circle containing the number 7 next to it.
- Contract Information:** Three fields: 'Contract Type' (dropdown, 8), 'Weekly Hours' (spinner, 9), and 'Work Pattern' (text input, 10).
- Notice Period:** Three fields: 'Probation Period', 'Probation Notice Period', and 'Notice Period', each with a 'Weeks' dropdown. A purple bracket groups these three fields with a purple circle containing the number 11.

At the bottom left, there are two buttons: 'Back' and 'Save'.

Figure 6.1.3.1

- 6 In the **Notice Period** section ¹¹ of the tab, enter the **Probation & Notice Periods** – click, on the drop down arrow at the end of each field to change the unit from **Weeks** to **Days**, or **Months**



Figure 6.1.3.2

6.1.3 Salary & Benefits

- 1 Select the Salary & Benefits tab
- 2 Enter the amount of the **Basic Salary** ¹²
- 3 Enter a **Salary Band** if applicable ¹³

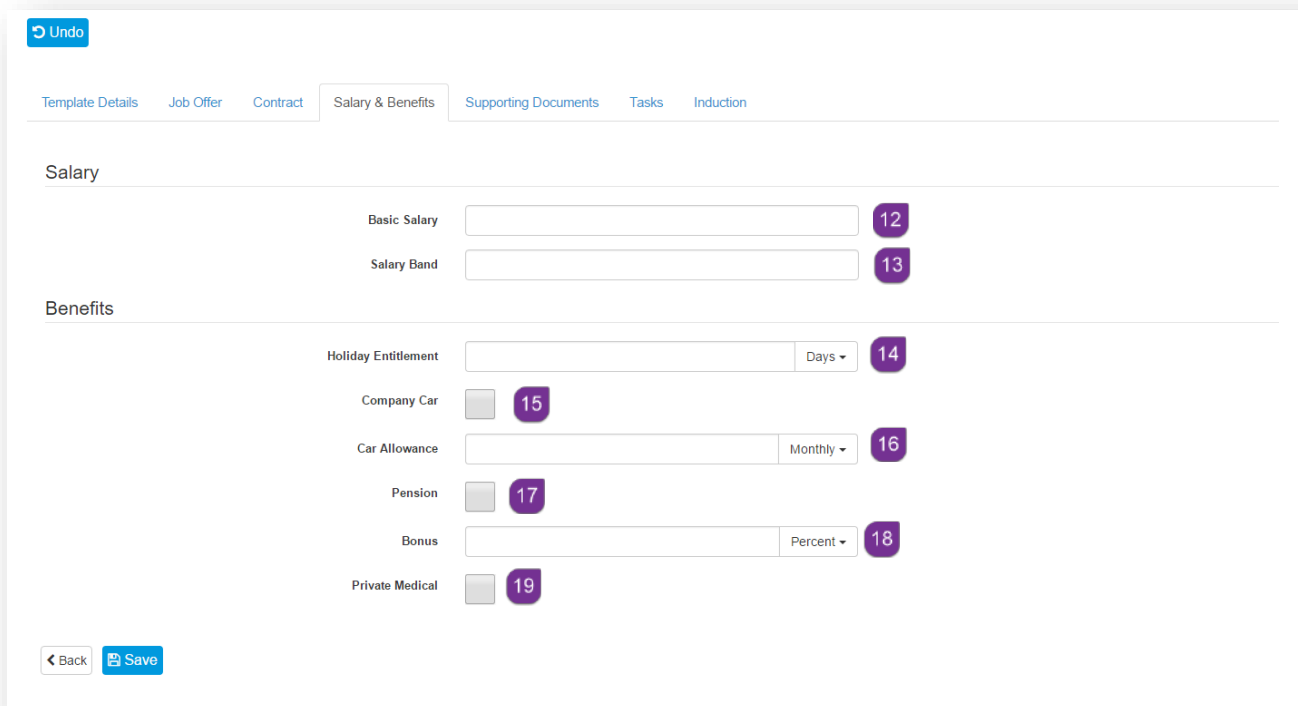


Figure 6.1.4.1

- 4 In the **Benefits** section, enter the **Holiday Entitlement** ¹⁴ for this role. Click on the drop down menu at the end of the field to change the entitlement from Days to Hours ¹⁵

- 5 Tick the **Company Car** box if this is relevant to this role. Notice that when this box is ticked, the field below changes from **Car Allowance** to **Company Car Notes**

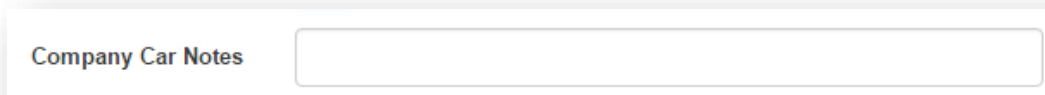
A screenshot of a web form showing a label 'Company Car Notes' followed by an empty text input field.

Figure 6.1.4.2

- 6 If a **Car Allowance** is relevant to this role, then leave the **Company Car** box unticked and enter the **Amount** of the allowance in the **Car Allowance** ¹⁶ field and use the drop down menu to indicate if the allowance is **Monthly** or **Annually**
- 7 If a **Pension** comes with this role, then ensure that you tick the **Pensions** box ¹⁷. Note that when this box is ticked, an additional field appears below called **Pension Contribution**. Enter the amount of the contribution, use the drop down menu to indicate if the contribution is an **Amount** or **Percentage**

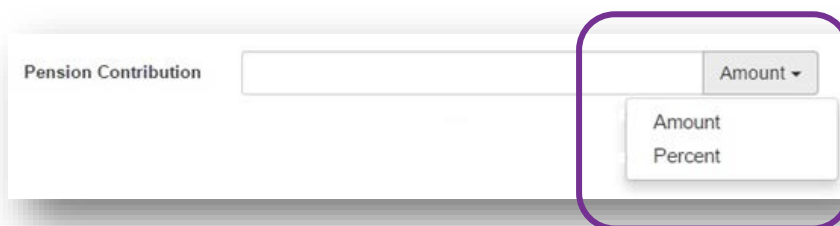
A screenshot of a web form showing a label 'Pension Contribution' followed by an empty text input field. To the right of the input field is a dropdown menu with 'Amount' selected. The dropdown menu is open, showing 'Amount' and 'Percent' as options. A purple rounded rectangle highlights the dropdown menu.

Figure 6.1.4.3

- 8 If a **Bonus** is payable as part of this role, then enter the amount in figure in the Bonus field, use the drop down menu to indicate if the bonus is an **Amount** or **Percentage**

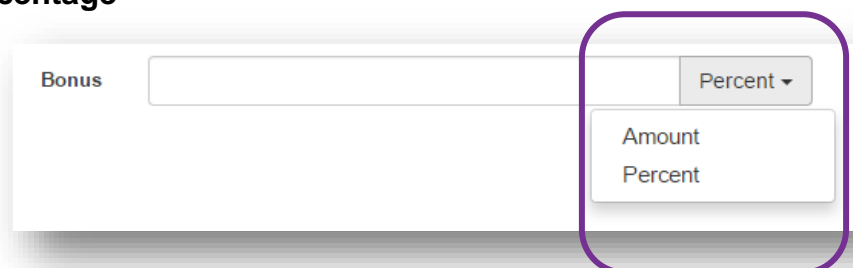
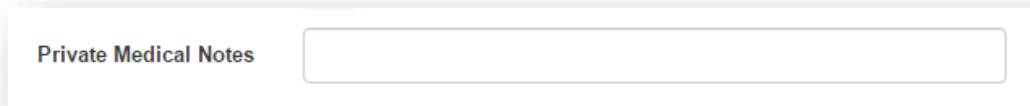
A screenshot of a web form showing a label 'Bonus' followed by an empty text input field. To the right of the input field is a dropdown menu with 'Percent' selected. The dropdown menu is open, showing 'Amount' and 'Percent' as options. A purple rounded rectangle highlights the dropdown menu.

Figure 6.1.4.4

- 9 If **Private Medical** cover is included as part of this role, ensure that you tick the **Private Medical** tick box. Note that when this box is ticked, an additional



field appears below called **Private Medical Notes**. Enter any additional information relating to the **Private Medical** cover here



A screenshot of a form field labeled "Private Medical Notes". The label is in a bold, dark font. To the right of the label is a large, empty rectangular text input box with a thin border.

Figure 6.1.4.5

6.1.4 Supporting Documents

- 1 Select the Supporting Documents tab
- 2 You will see a list of all of the **Documents** that you added at step 3.1
- 3 Select the relevant **Document** that you want to attach to the **Onboard Template**, and click on  to assign. Alternatively, click on  to assign all documents

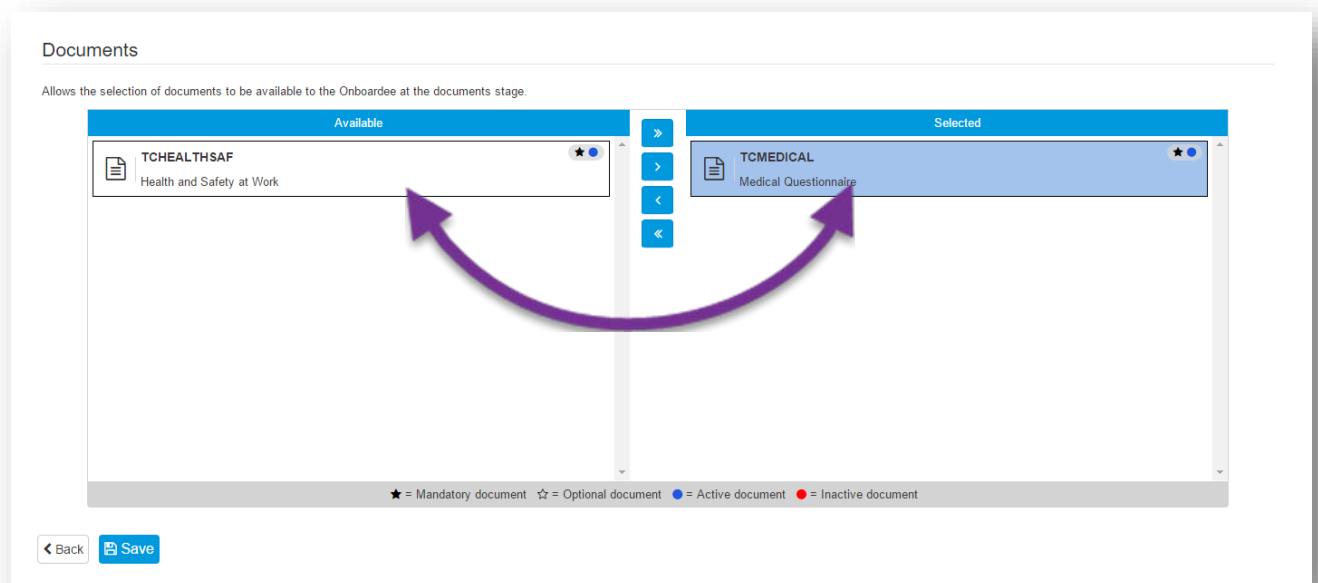




Figure 6.1.5.1

6.1.5 Tasks

- 1 Select the **Tasks** tab
- 2 You will see a list of all of the **Tasks** that you added at step 4.1
- 3 Select the relevant **Task** that you want to attach to the **Onboard Template**, and click on to  assign. Alternatively, click on  to assign all tasks

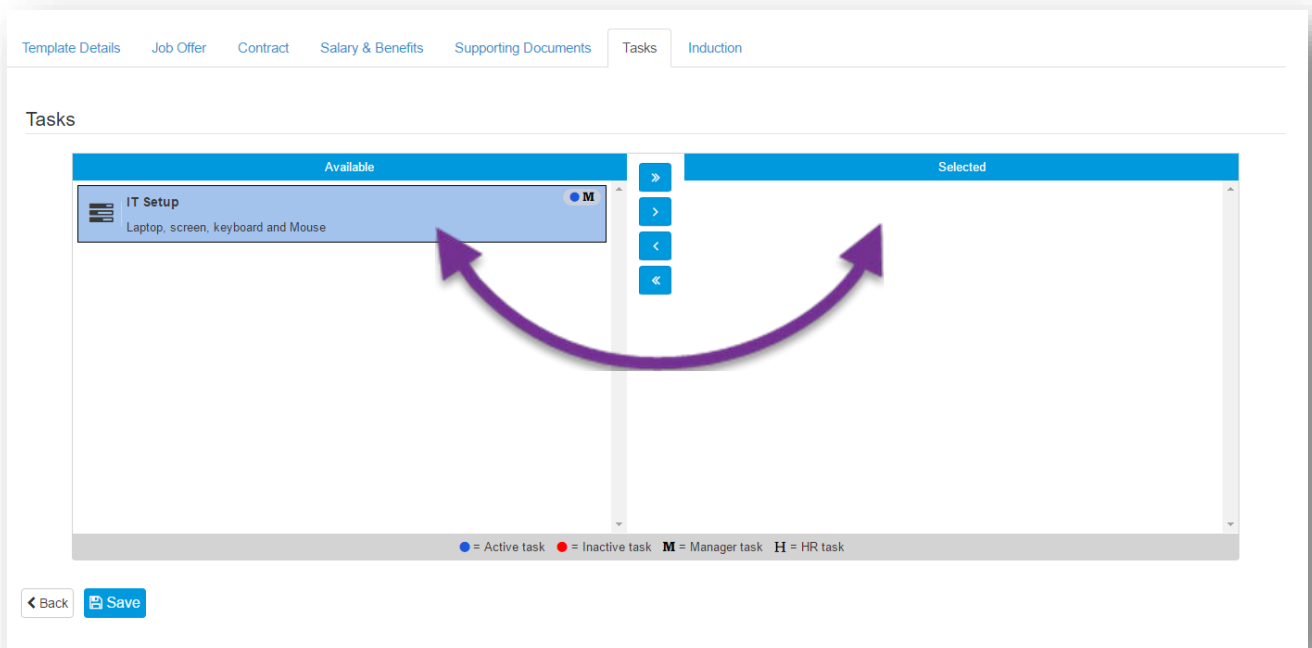







Figure 6.1.6.1

6.1.6 Induction

- 1 Select the **Induction** tab
- 2 You will see the **Reading List & Courses** that you added via **Documents** at step 3.1 & **Courses** that you added at step 5.1
- 3 Select the relevant **Reading List** item that you want to attach to the Onboard Template, and click on  to assign. Alternatively, click on  to assign all items
- 4 Select the **Course** that you want to attach to the Onboard Template, and click on  to assign. Alternatively, click on  to assign all courses
- 5 Click,  to keep the changes

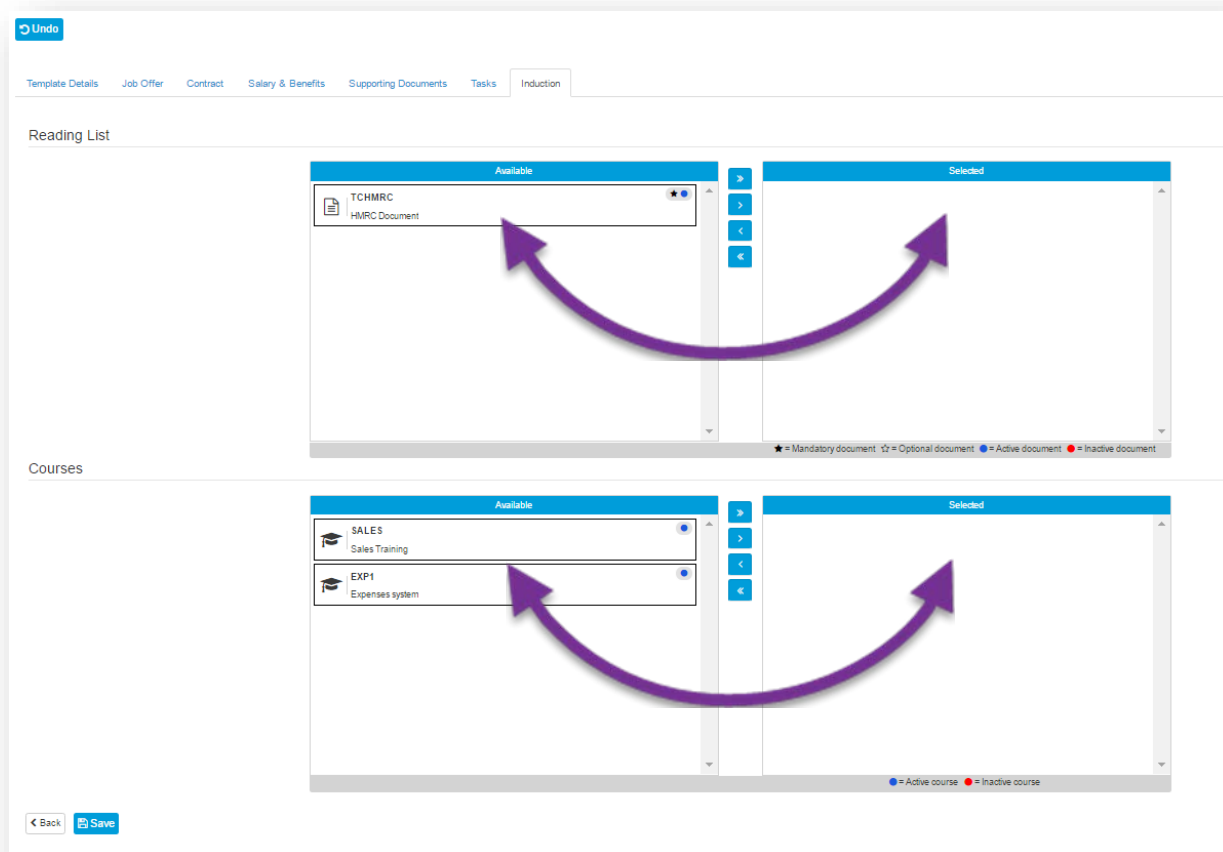


Figure 6.1.7.1

- 6 Click, **Back** or on **Onboard Template** in the menu to see a list of all templates, for your company

Name	Description	Department	Company
Administrator	Full-Time Administrator	Offices	Holiday Camps UK
Payroll Clerk	Part-Time Payroll Clerk	Admin	Holiday Camps UK
Sales Manager	Full-Time Senior Manager	DX1	Holiday Camps UK
Sales Executive	Full-Time Sales Executive	Sales	Holiday Camps UK
Financial Director	Permanent Financial Director	DX1	Holiday Camps UK

Figure 6.1.7.2

7.0 Onboardees

The **Onboarder** is the person receiving the **Job Offer** from the company. Once their details have been entered into the Onboarder record, they receive an email containing details on where and how-to login to their offer information via the webonboarding system. Once the Onboarder has confirmed their start date, more information is made available to them.

7.1 How to Create an Onboarder Record using an Existing Onboard Template

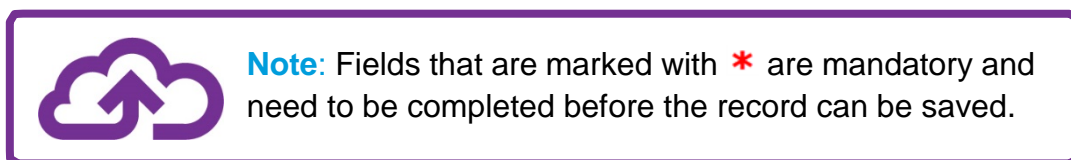
- 1 From the **Dashboard** or **Menu**, navigate to **Onboardees**
- 2 Click, **+ Add Onboarder** button
- 3 Select the **Onboard Template**, that is relevant to the role, from the drop down list and click **OK**

Figure 7.1.1

- 4 Once you have selected the template, you will see the **Onboardee** screen. The majority of this screen is completed by the Onboardee when they receive their login details

The screenshot displays a web form for entering an onboarding record. At the top, there is a navigation bar with tabs: Personal Details (selected), Address, Job Offer, Contract, Salary & Benefits, Authorisation, Supporting Documents, Tasks, Induction, and Payroll Information. The form is divided into three main sections: Identity, Personal, and Status. The Identity section includes fields for Title (dropdown), Forename* (text), Middle Name(s) (text), Surname* (text), and Known As (text). The Personal section includes Gender (dropdown), Birthdate (text with a calendar icon), Ethnicity (dropdown), and a Disabled status section with radio buttons for No, Yes, and Prefer not to say. The Status section includes an Active checkbox which is checked. At the bottom left, there are 'Back' and 'Save' buttons.

Figure 7.1.2



7.1.1 Personal Details

- 1 Select the **Personal Details** tab
- 2 Enter the details based on the information provided on the Onboardees application form or CV
- 3 Any non mandatory fields that are left blank can be populated by the Onboardee once they have received their offer letter

7.1.2 Address

- 1 Select the **Address** tab
- 2 A valid **Email** address **1** has to be entered, this is imperative for the Onboarder to receive access to their onboard details and documentation
- 3 Enter the **Address** **2** details from the application form or CV
- 4 Enter the Onboarder's **Emergency Contact** **3** details if available (this can be left blank as the Onboarder has the opportunity to enter these details themselves once the offer letter is sent)

The screenshot shows a web form for entering an on-boarder's details. At the top, there is a navigation bar with tabs: Personal Details, Address, Job Offer, Contract, Salary & Benefits, Authorisation, Supporting Documents, Tasks, Induction, and Payroll Information. The 'Address' tab is selected. Below the navigation bar, the form is organized into three main sections: Contact, Address, and Emergency Contact. The Contact section includes fields for Email (marked with a purple '1'), Telephone, and Mobile. The Address section includes a search bar labeled 'Type address search here', Address Line 1, Address Line 2 (marked with a purple '2'), Town or City, County, Postcode, and a Country dropdown menu. The Emergency Contact section includes fields for Forename, Surname (marked with a purple '3'), Relationship to Onboarder, Telephone, and Mobile. At the bottom left of the form, there are 'Back' and 'Save' buttons.

Figure 7.1.2.1

7.1.3 Job Offer

- 1 Select the **Job Offer** tab
- 2 The majority of information **4** set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required

3 Enter the details of who the **Contact 5** is for the Onboarder on their first day

The screenshot shows a webonboarding form with the following sections and fields:

- Offer Template:** Offer Letter* (dropdown menu)
- Job Information:** Title* (Financial Director), Description (Full-Time Financial Director), Location (Oxfordshire), Department (OX1), Division (#OXe13)
- Reports To:** Forename (Paigot), Surname (Murdigon), Job Title (Director)
- First Day:** Contact Forename, Contact Surname, Contact Job Title, Start (calendar icon), Location, Notes

Annotations: A purple bracket labeled '4' encompasses the Job Information and Reports To sections. A purple circle labeled '5' highlights the Contact Forename field in the First Day section.

Figure 7.1.3.1

7.1.4 Contract

- 1 Select the **Contract** tab
- 2 The information set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required.
- 3 Enter the Onboarder's **Start date** **6**
- 4 Enter the Onboarder's **Continuous service** **7** date if applicable

Undo

Personal Details Address Job Offer **Contract** Salary & Benefits Authorisation Supporting Documents Tasks Induction Payroll Information

Contract Template

Contract Contract

Contract Information

Contract Type Full-time Permanent

Start **6**

Continuous Service **7**

Weekly Hours 39

Work Pattern Monday - Friday

Notice Period

Probation Period 3 Months

Probation Notice Period 2 Weeks

Notice Period 2 Months

Back Save

Figure 7.1.4.1

7.1.5 Salary & Benefits

- 1 Select the **Salary & Benefits** tab
- 2 The information **8** set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required.

The screenshot shows a web form for configuring salary and benefits. At the top, there is a navigation bar with tabs: Personal Details, Address, Job Offer, Contract, Salary & Benefits (active), Authorisation, Supporting Documents, Tasks, Induction, and Payroll Information. Below the navigation bar, the form is divided into two main sections: Salary and Benefits. The Salary section contains two input fields: 'Basic Salary' with the value '100000' and 'Salary Band' with the value 'A*'. The Benefits section contains several fields: 'Holiday Entitlement' (35) with a 'Days' dropdown, 'Private Entitlement' (empty) with a 'Days' dropdown, 'Company Car' (checked), 'Company Car Notes' (Bentley Continental), 'Pension' (checked), 'Pension Contribution' (20) with a 'Percent' dropdown, 'Bonus' (50) with a 'Percent' dropdown, 'Private Medical' (checked), and 'Private Medical Notes' (Medical Sys). A purple circle with the number '8' is overlaid on the 'Private Entitlement' field. At the bottom left, there are 'Back' and 'Save' buttons.

Figure 7.1.5.1

7.1.6 Authorisation

- 1 Select the **Authorisation** tab
- 2 The **Process** section automatically populates and can't be amended
- 3 In the **Authorisation** section, select who can approve the offer, from the drop down menu **9**. The options are **Manager**, **HR** or **HR and Manager**

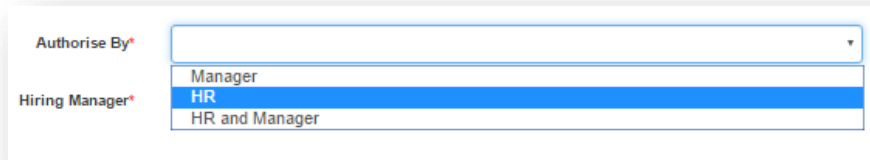


Figure 7.1.6.1

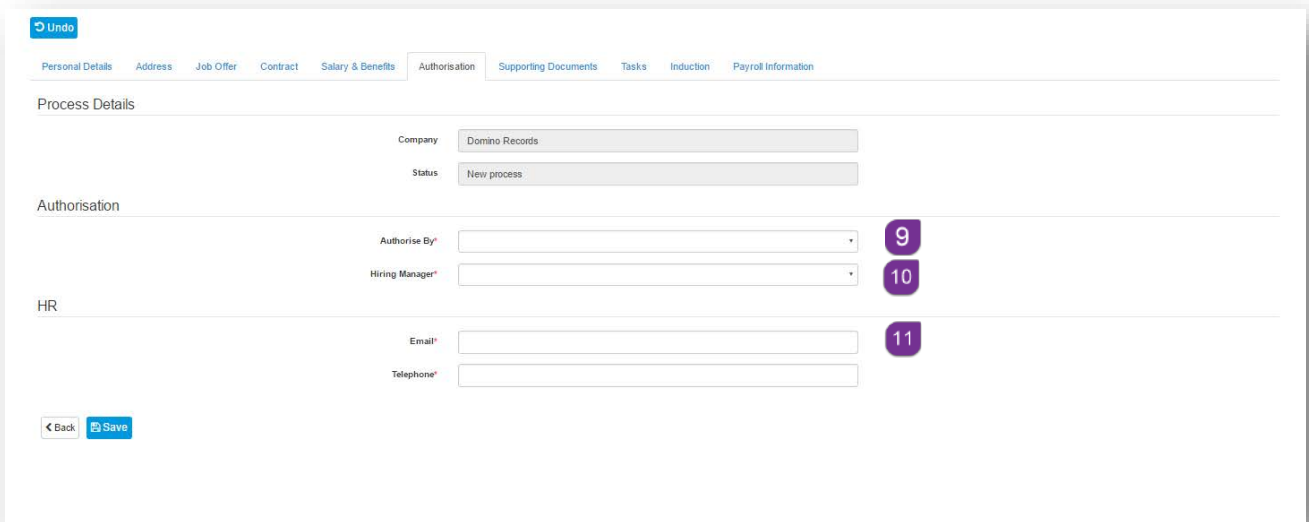


Figure 7.1.6.2

- 4 Select the **Hiring Manager** **10**, by name, from the drop down menu

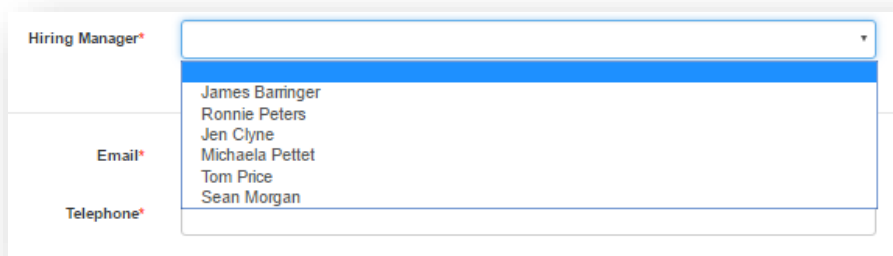


Figure 7.1.6.3

- 5 Enter the **HR Contact** ¹¹ details so that the Onboarder knows who to contact with questions

7.1.7 Supporting Documents

- 1 Select the Supporting Documents tab
- 2 The information set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required

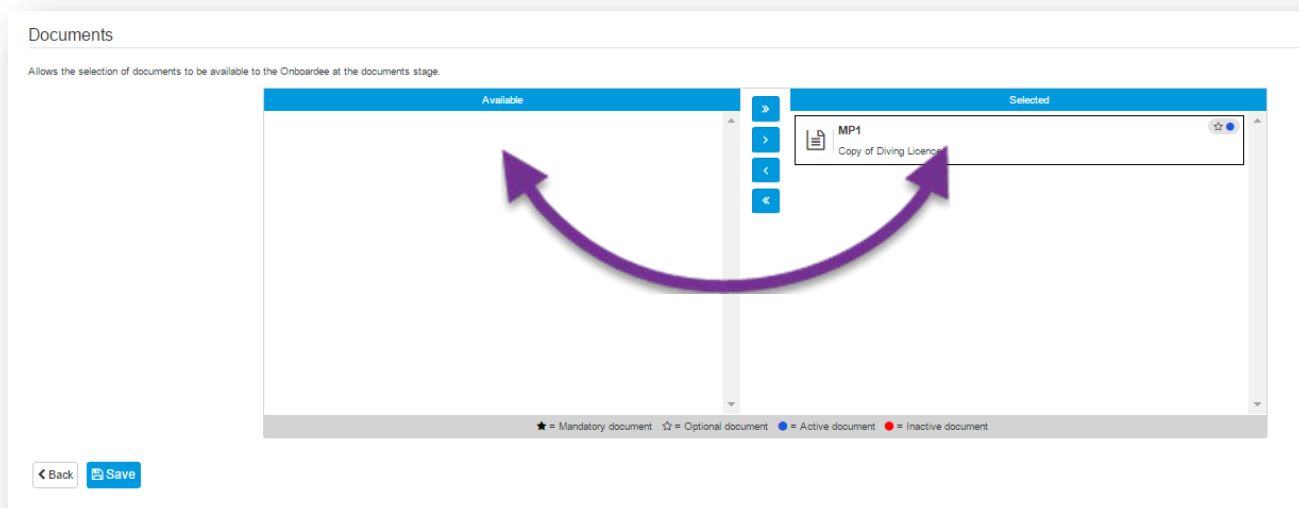






Figure 7.1.7.1

- 3 Click on  to assign a document. Alternatively, click on  to assign all documents

7.1.8 Tasks

- 1 Select the **Tasks** tab
- 2 The information set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required
- 3 Click on  to assign a task. Alternatively, click on  to assign all tasks

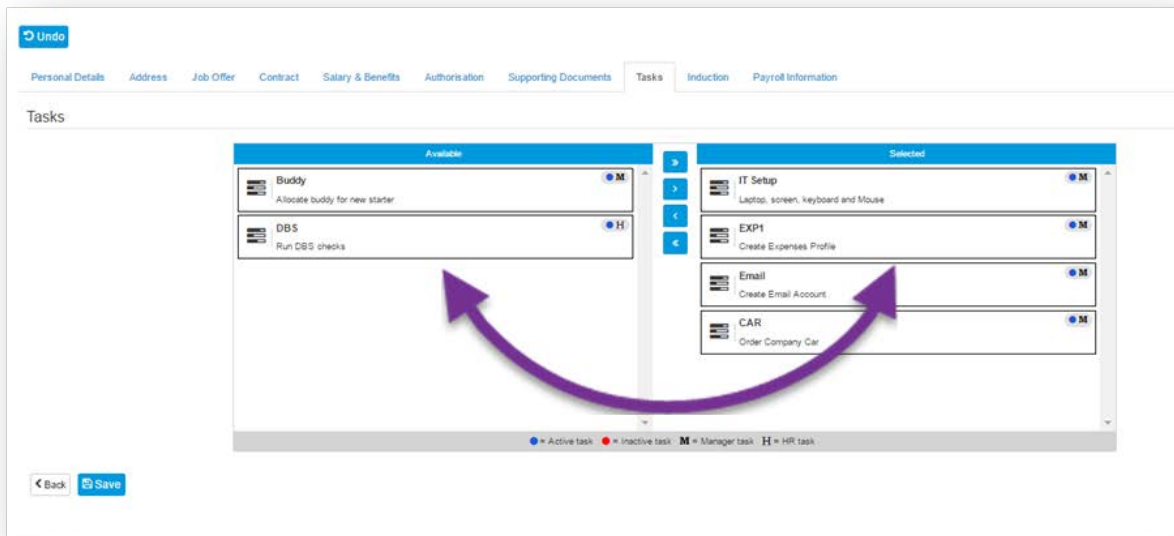






Figure 7.1.8.1

7.1.9 Induction

- 1 Select the **Induction** tab
- 2 The information set up for the **Onboard Template** will pre-populate although it is possible to override/change details at this stage if required
- 3 Click on  to assign an item from the **Reading List**. Alternatively, click on  to assign all items from the **Reading List**
- 4 Click on  to assign an item from **Courses**. Alternatively, click on  to assign all items from Courses

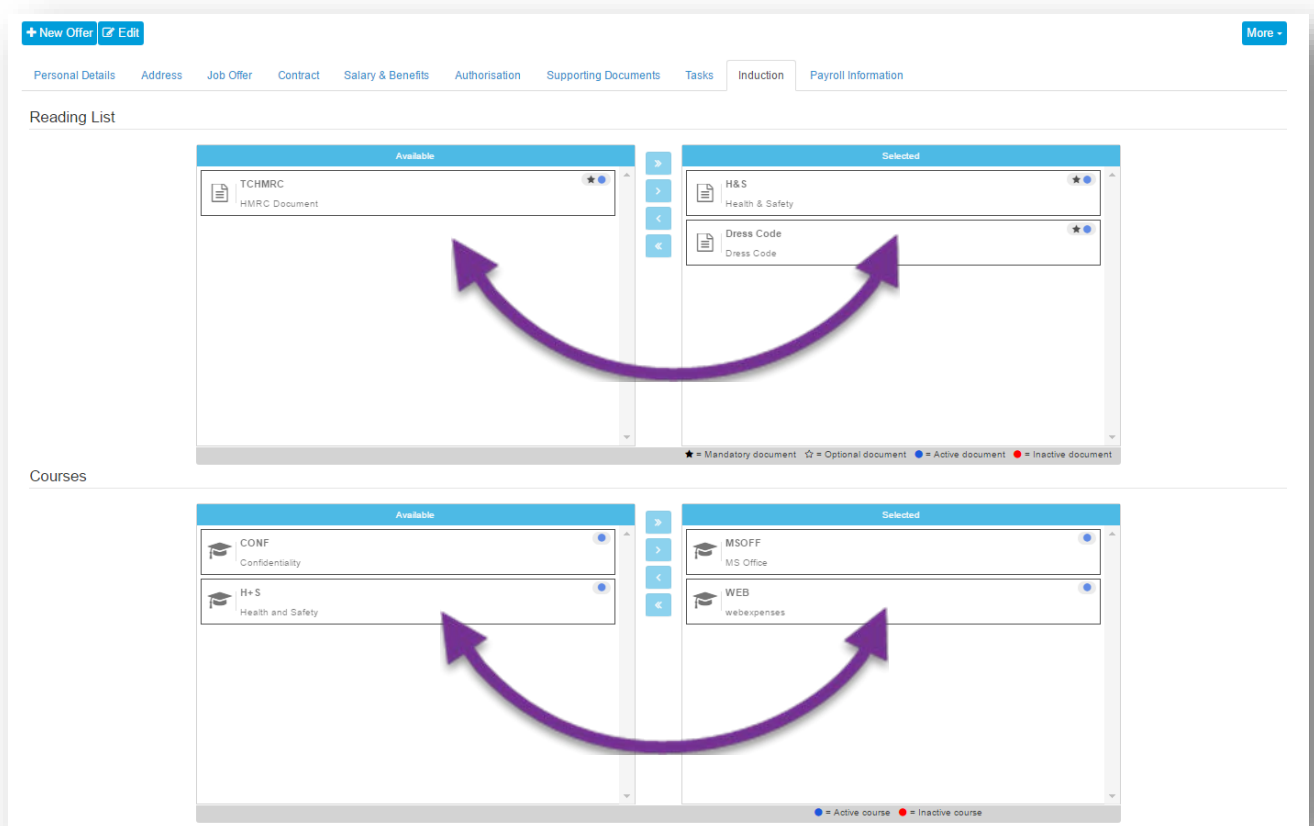


Figure 7.1.9.1

7.1.10 Payroll Information

The **Payroll Information** tab will be completed by the **Onboarder** once they have received their webonboarding access details. These are sent to the Onboarder when the Offer has been authorised.

Once the **Sort Code** and **Account number** have been completed, the **Bank Name** will automatically populate, confirming that the details entered are correct.

The **NI Number** must to be input in the correct format before the details can be saved.

General Address Payroll Information

Bank

Account Holder Name(s)

Bank Name

Sort Code*

Account Number*

IBAN

Swift Code

Tax

NI Number*

Save

Figure 7.1.10.1

8.0 Sending the Offer and Contract of Employment

Once the Onboarder details have been created, the offer letter and contract of employment need to be Authorised, this will be completed by **HR**, a **Manager** or both. An email notification is sent to the **Authorising Manager** requesting the review and sign off the offer letter and contract once **HR** have completed the authorisation.

Now that the Onboarder details are saved, two progress bars can be seen at the top of the record. These show you the progress from **HR** and the progress from the **Onboarder**.

The screenshot displays the 'HR Progress' interface. At the top, there are two progress bars: 'HR Progress' (with a 'New' dropdown) and 'Onboarder Progress'. The 'HR Progress' bar shows stages: 'Generated', 'HR Review *', 'MGR Reviewed', and 'Open'. The 'Onboarder Progress' bar shows stages: 'Contract', 'My Details', 'Referees', 'Documents', 'Accepted *', 'Reading', and 'Complete'. Below the progress bars are buttons for 'Edit', 'Review Offer', and 'More'. A navigation menu includes 'Personal Details', 'Address', 'Job Offer', 'Contract', 'Salary & Benefits', 'Authorisation', 'Supporting Documents', 'Tasks', 'Induction', and 'Payroll Information'. The 'Personal Details' section is expanded, showing fields for Identity (Title: Miss, Forename: Jackie, Middle Name(s):, Surname: Greenstop, Known As: Jax) and Personal (Gender: Female, Birthdate: 26/06/1984, Ethnicity:, Disabled: No/Yes/Prefer not to say). The Status section shows 'Active' checked.

Figure 8.0.1

8.1 How to Authorise and Sign Off a Contract of Employment

8.1.1 By HR

When you login to your webonboarding account as an **HR Admin**, you will see a notification on the Dashboard of any **Onboardees** that are awaiting to be **Authorised**.

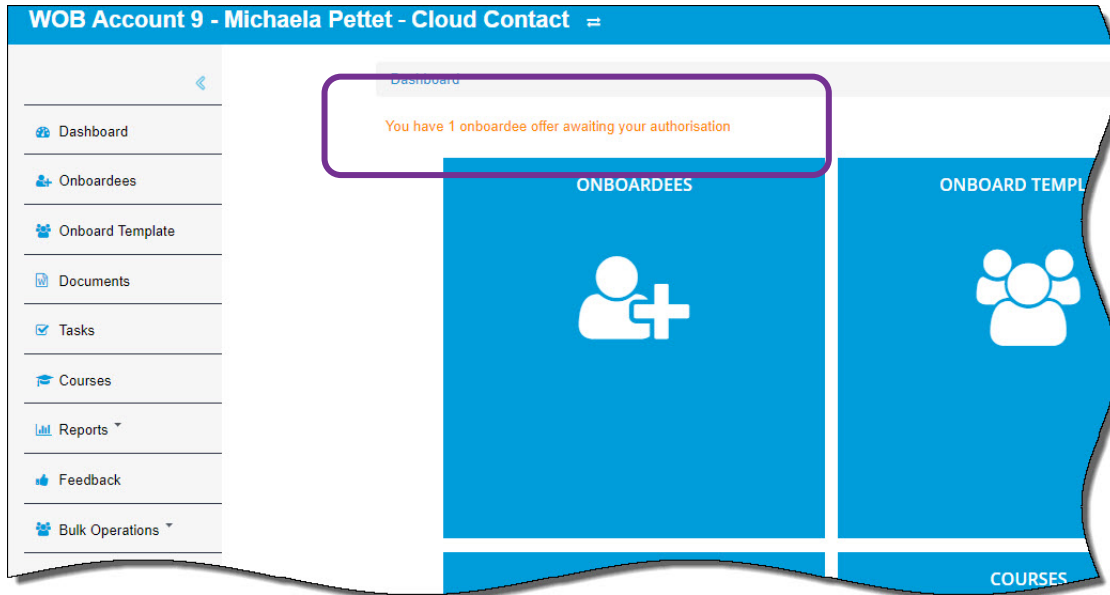


Figure 8.1.1.1

- 1 Click on the notification to view all Onboardees that are awaiting authorisation

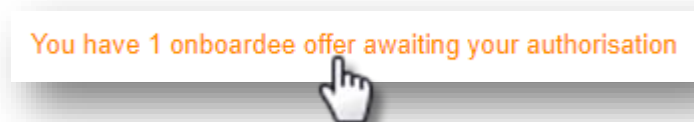


Figure 8.1.1.2

You will now see a list of all awaiting Onboardees


This list shows the outstanding onboardee offers that require the contracts and offers letters to be reviewed and authorised.

🔍 ✕

Include Inactive Records



Forename	Surname	Company	Status	Action
Jackie	Greenstop	Cloud Contact	Contract & offer generated	✔

Figure 8.1.1.3


- 2 Click  at the end of each record to download and view the Onboardees **Contract** and **Offer Letter**


Overview

When we generate the contract and offer letter they become available for you to authorise. You must download, review and authorise these before we can send them to the hiring manager for them to review.


 HR: Not yet authorised
 Hiring Manager: Not yet authorised.


Contract

Name	CON2
File Name	Standard Contract
File Extension	PDF
Generated On	06/07/2017 

 Download

Offer letter

Name	OFF2
File Name	Standard Offer Letter
File Extension	PDF
Generated On	06/07/2017 

 Download



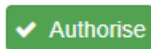
 Back  Authorise

Figure 8.1.1.4

- 3 Once these have been reviewed and are ready for Authorisation, click



- 4 A warning will appear at the top of the screen
- 5 Click **Yes** to confirm and proceed

Confirmation of Authorisation will be confirmed on the screen. If the **Manager** also needs to **Authorise** the Contract and Offer letter, an email notification will be sent to them advising that this needs to be done.

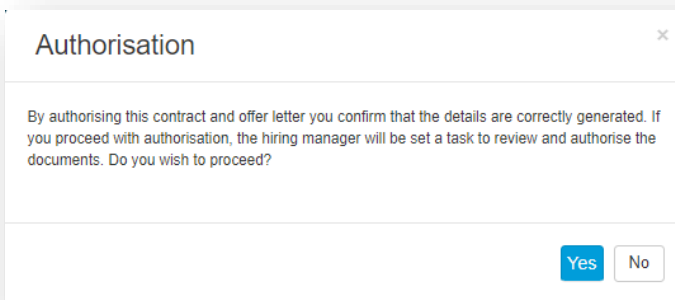


Figure 8.1.1.5

Once authorised by **HR**, or **HR** and the **Manager**, the **Onboarder** will receive their invitation to the **Onboarder Portal** where they can download their documents.

Alternatively, select the **Onboarders** record and click [Review Offer](#), this will take you to the Authorise screen (see Figure 8.1.1.4). Follow the process from Step 3.

8.1.2 By Manager

The **Authorising Manager** will receive an email notification advising them to login to their webonboarding account.

- 1 Login to your webonboarding account
- 2 From the **Dashboard**, click on the notification at the top of the screen

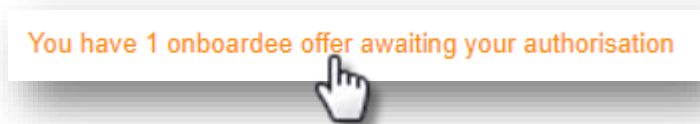



Figure 8.1.2.1

You will now see a list of all awaiting Onboarders

This list shows the outstanding onboarder offers that require the contracts and offers letters to be reviewed and authorised.



Forename	Surname	Company	Status	Action
Jackie	Greenstop	Cloud Contact	Contract & offer generated	

Figure 8.1.2.2


- 1 Click  at the end of each record to download and view the Onboardees **Contract** and **Offer Letter**


Overview

The contract and offer letter are available for you to authorise. You must download, review and authorise these before we can send them to the onboardee.


 **HR:** Authorised by Michaela Pettet on 06/07/2017 04:20
 **Hiring Manager:** Not yet authorised.


Contract

Name	CON2
File Name	Standard Contract
File Extension	PDF
Generated On	06/07/2017 

 **Download**

Offer letter

Name	OFF2
File Name	Standard Offer Letter
File Extension	PDF
Generated On	06/07/2017 

 **Download**




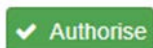
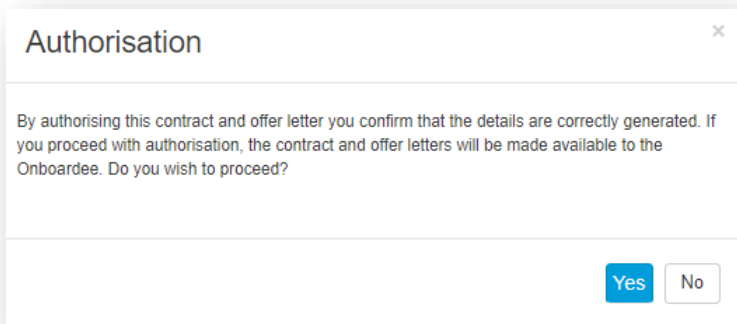
 **Back**  **Reject**  **Authorise**

Figure 8.1.2.3

- 2 Once these have been reviewed and are ready for **Authorisation**, click





Confirmation of Authorisation will be confirmed on the screen and the **Offer letter** and **Contract** are made available to the **Onboarder** on the **Onboarder Portal**.

Figure 8.1.2.4

- 3 To return the process to **HR** for any amendments click **✖ Reject**
- 4 Enter the reason for rejecting the **Offer Letter** and **Contract** and click **OK**

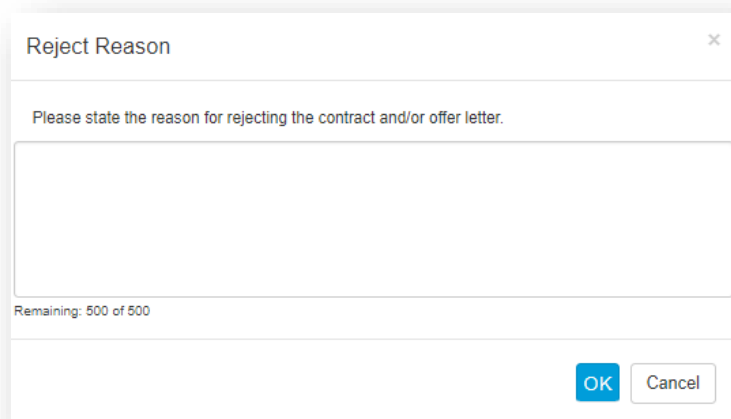


Figure 8.1.2.5

- 5 **HR** Admin will be notified by email of the rejection and will also see this on the progress bar in the **Onboarder** details

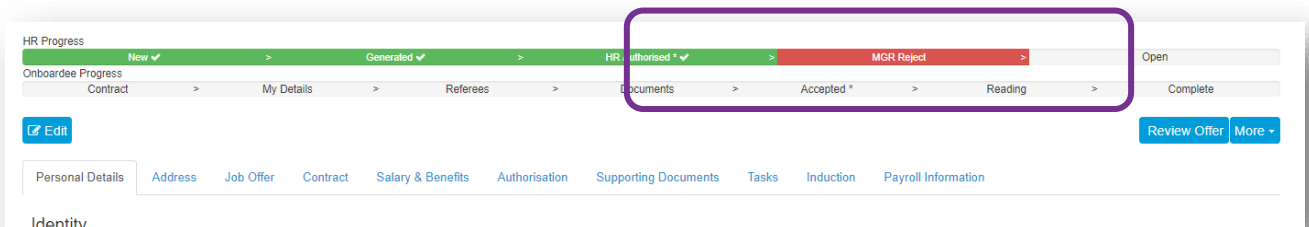


Figure 8.1.2.6

8.2 Regenerate Offer Documents

If an offer has been rejected by HR or the authorising Manager, the **Offer Letter** and **Contract** will need to be amended and then regenerated.

- 1 Once new documents are uploaded for the **Onboarder**, go to the **More** button and select **Regenerate Offer Documents**
- 2 A warning will appear on screen, click **Yes** to confirm

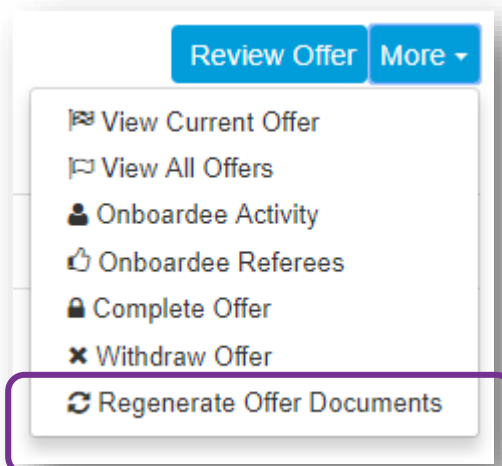


Figure 8.2.1.

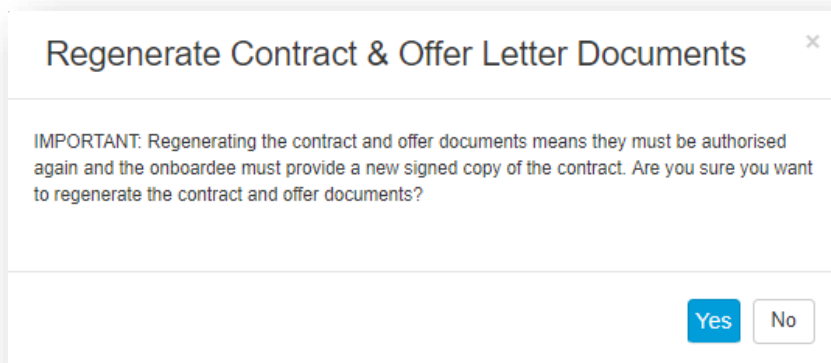


Figure 8.2.2.

9.0 Other Menu Items Under **More** and How to Use Them

Whilst you have the employee record open, click on the **More** button for the following menu

- **View Current Offer**
 - An Onboarder can have more than one **Offer record** but only one can be **Open**. If you are viewing a closed offer, click here to return to the **Current Open Offer**

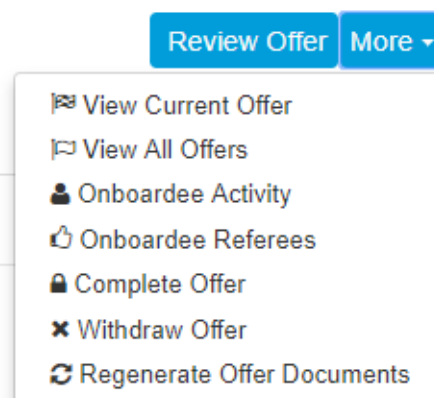


Figure 9.0.1

- **View All Offers**
 - Click here to see a list of **all** offers for the Onboarder.
- **Onboarder Activity**
 - Select this option from the menu to show you the full detail of the Onboarder's progress including the signed **contract** and any **documents** that have been uploaded and read

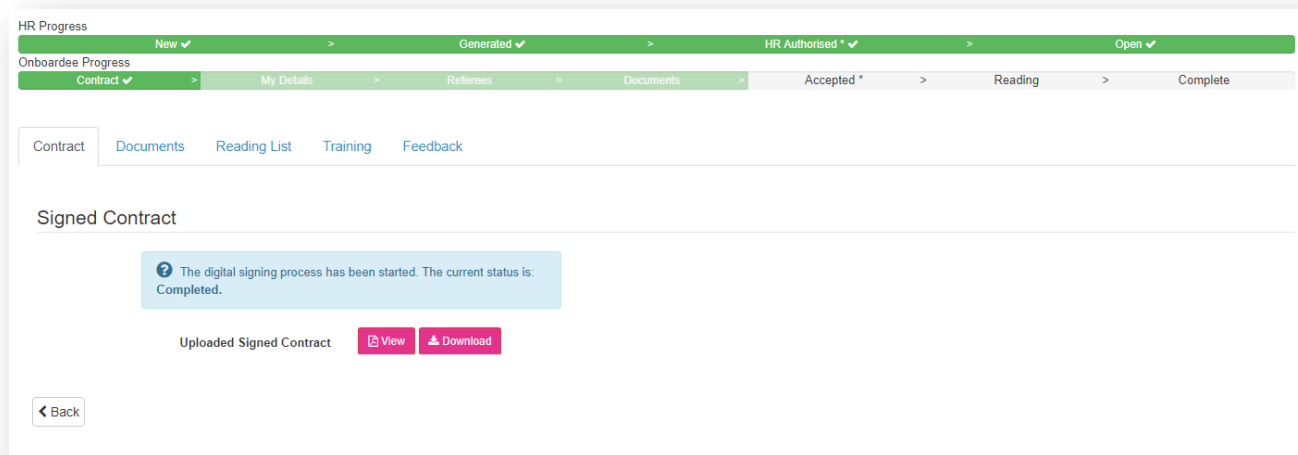


Figure 9.0.2

- **Onboarder Referees**
 - Click here to view or add or edit the full details of the Onboarder's Referees
- **Complete Offer**
 - This menu option will close off the current offer and notify the Onboarder that the onboarding process is now complete. Once closed, the Onboarder has access to stage 6 & 7 of the Dashboard options.

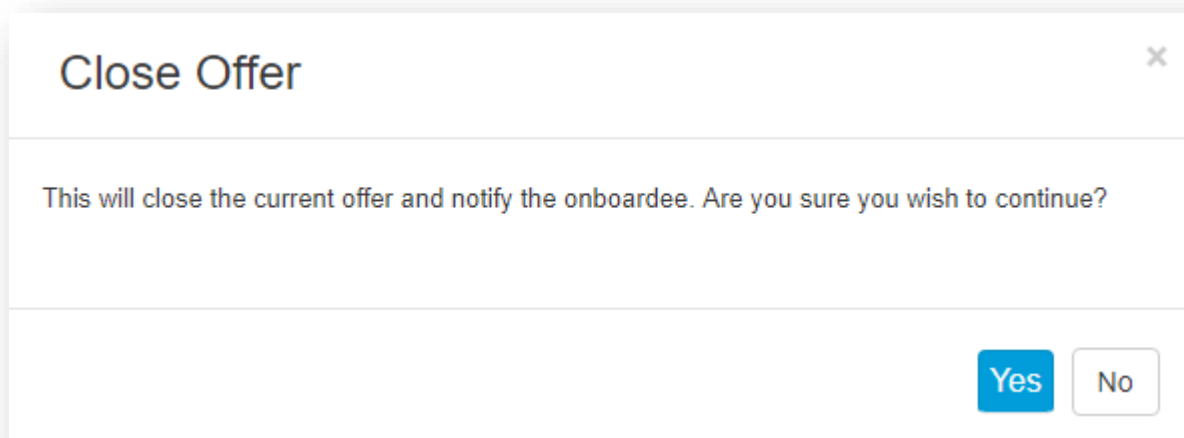


Figure 9.0.3

Onboarder Portal - Open Offer



Figure 9.0.4

Onboarder Portal – Closed Offer

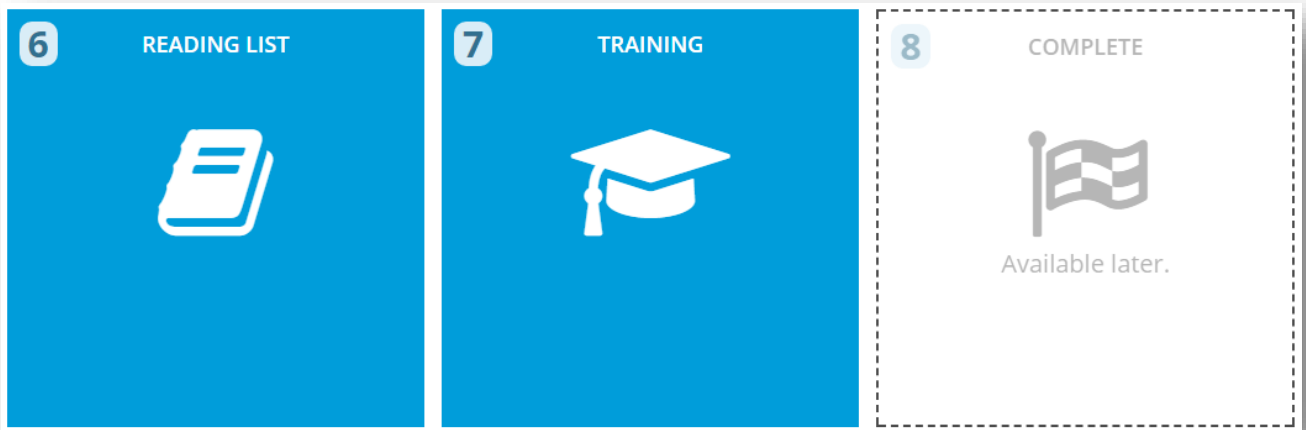


Figure 9.0.5

This function is great to use if someone manually completes and delivers their documentation. All details of the Onboarder can still be added and the remainder of the process completed by the Onboarder.

Withdraw Offer

- There may be instances when the offer needs to be withdrawn from the Onboarder after it has been issued e.g. Unsatisfactory references, incomplete documentation. Click on this option to withdraw the offer. A reason for the withdrawal needs to be entered before clicking **OK** to confirm

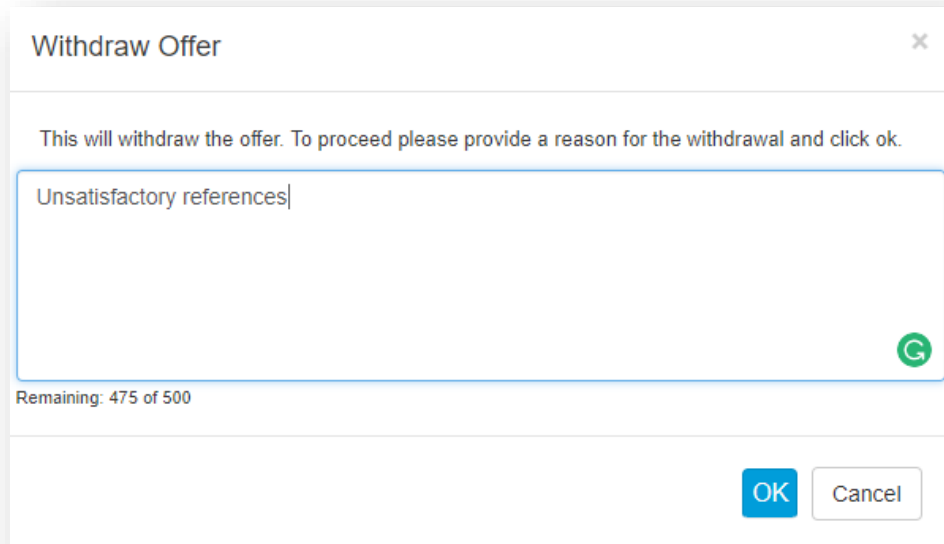


Figure 9.0.6

Once you have confirmed that it is **OK** to withdraw the offer, the HR Progress bar will confirm this had been completed.

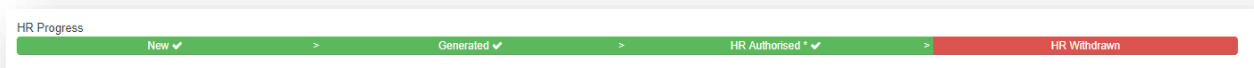


Figure 9.0.7

- **Regenerate Offer Documents**

- Once the **Offer letter** and **Contract** have been issued, amendments to these may be required. E.g. New start date. Once the relevant changes have been made to the documents and they have been re-attached to the Onboarder's record, click on Regenerate Offer Documents. The screen will show you a warning message. Click **Yes** to proceed.

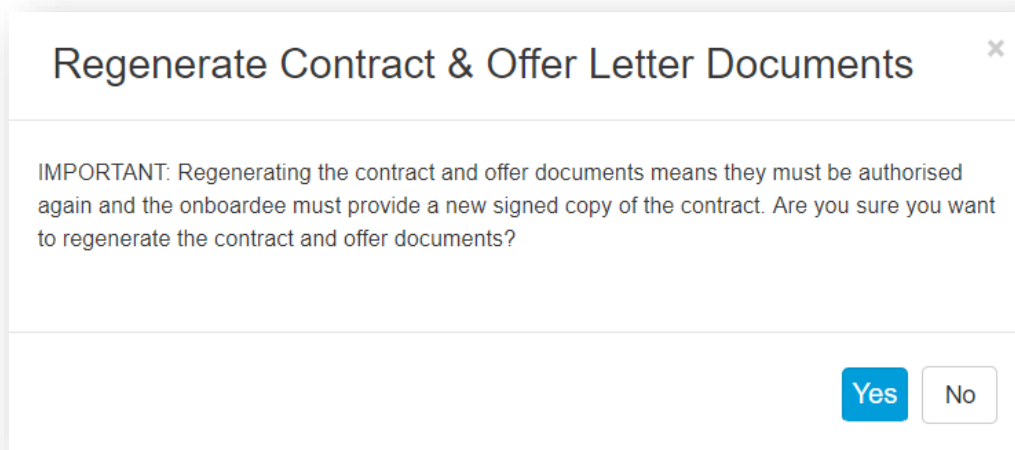


Figure 9.0.8

This will take you to the **Review Offer** screen where you can review the regenerated documentation and either **Authorise** or **Reject**. Once authorised, the new documents will be available to the **Onboarder** via the Onboarder Portal.

10.0 Customising the Email Templates

Webonboarding generates emails automatically based on actions that happen during the Onboarding process.

Each email can be tailored to suit your organisations wording and branding by changing the content, introducing the company logo(s) and setting the font to your house style.

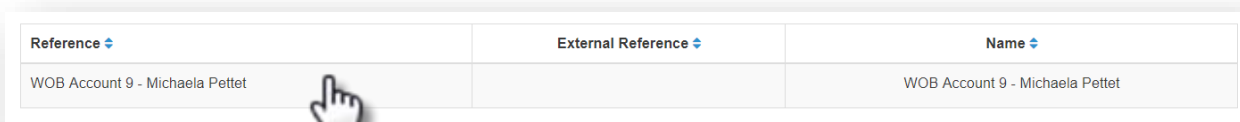
The Email templates can be found at **Account** level and **Company** level.

Customising the templates at **Account** level will disseminate the changes to any **Companies**.

Customising the templates at **Company** level will be relevant to the company details that you are in and takes precedence over changes made at **Account** level.

10.1 How to Customise Emails at Account Level

- 1 Navigate to **Administration** in the menu
- 2 Select **Account**



Reference ▾	External Reference ▾	Name ▾
WOB Account 9 - Michaela Pettet		WOB Account 9 - Michaela Pettet

Figure 10.1.1

- 3 Click on the **Account Reference**
- 4 Click on the **Email Templates** tab
- 5 Here you will see a complete list of all the emails that are automatically generated

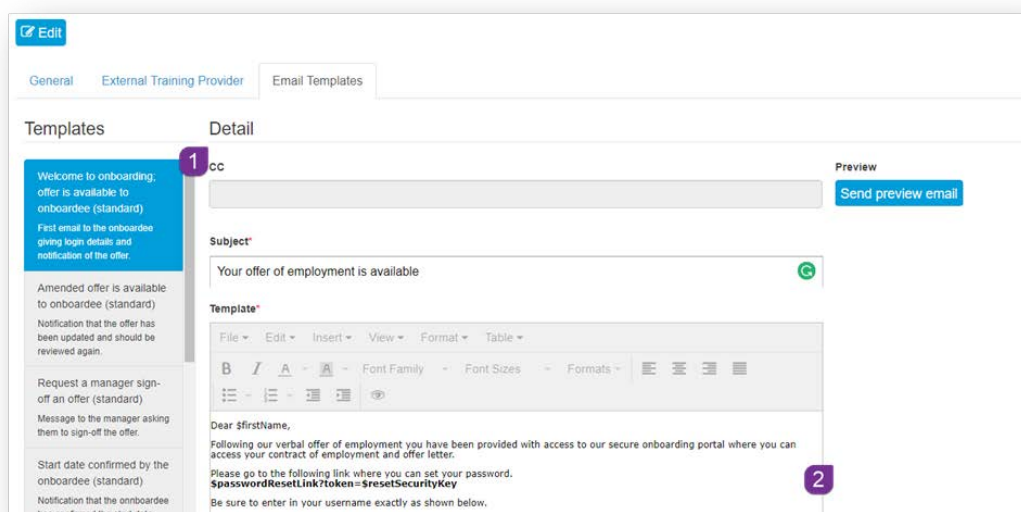



Figure 10.1.2

- 6 Select each one in turn **1** to preview the content **2**
- 7 Select the email that you want to customise
- 8 Click 
- 9 The Formatting tool bar is now available to use **3**

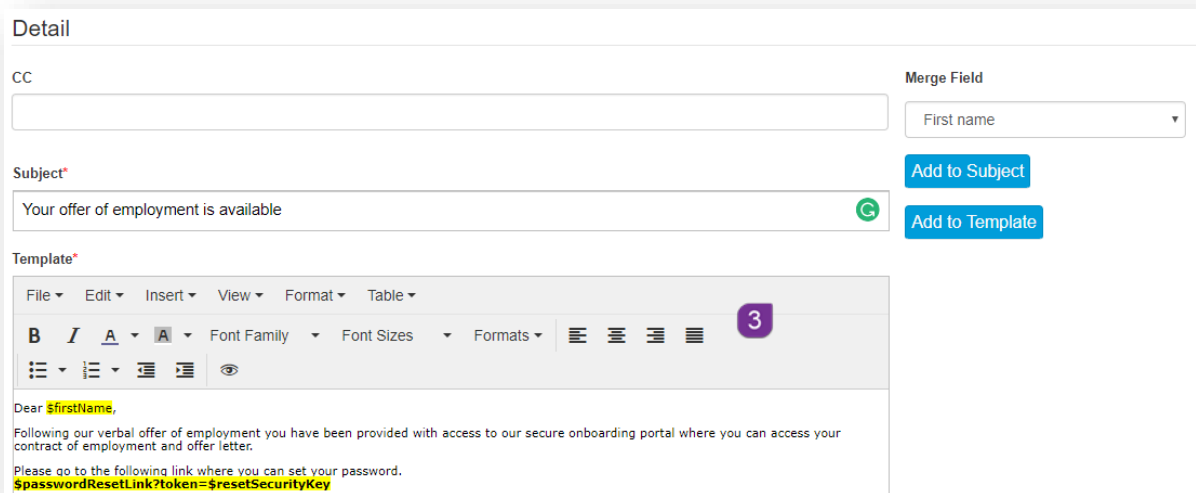


Figure 10.1.3

10.1.1 How to Insert Mail Merge Fields

Additional mail merge fields can be added into the email template. These will then be populated by the corresponding information in webonboarding, when the email is generated.

- 1 Click in either the **subject line** or the **body** of the email at the position you would like to insert the merge field
- 2 Select the required merge field from the drop down menu
- 3 Click on either **Add to Subject** or **Add to Template**
- 4 Your merge field has now been added

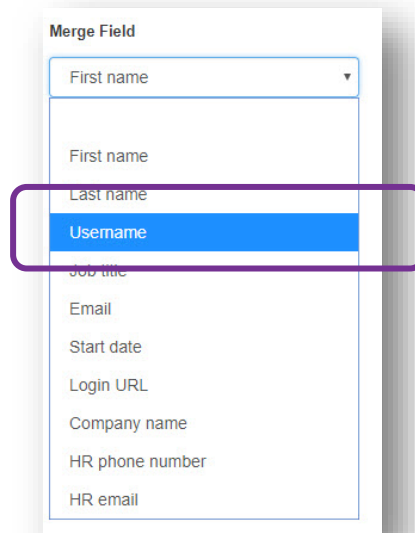


Figure 10.1.1.1

10.1.2 How to Insert an Image/Logo

- 1 Copy the image (Ctrl c or right click on the image and select Copy)
- 2 Click in the email template and then paste the image (Ctrl v or click on the image and select Paste)
- 3 To re-size the image, click to select and then drag the corner pips to resize

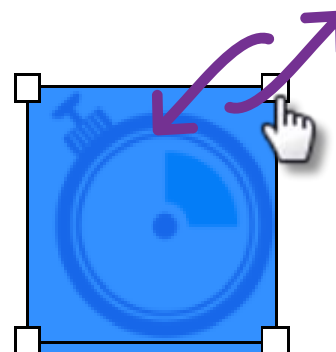


Figure 10.1.2.1

10.1.3 How to Insert a Link to an Image

- 1 Click **Insert** on the **Tool Bar**
- 2 Select **Insert/edit image** from the menu
- 3 Enter the Url in the **Source** field

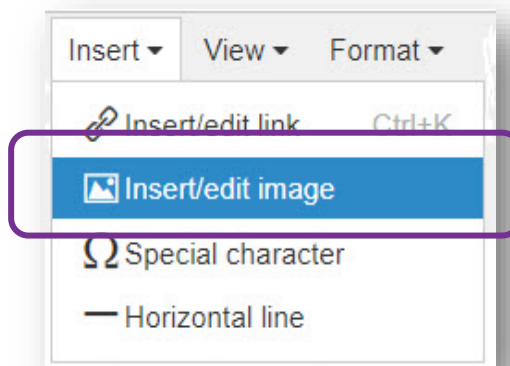


Figure 10.1.3.1

- 4 Add an **Image description** if required
- 5 Add the desired **Dimensions**
- 6 Click **OK** to save

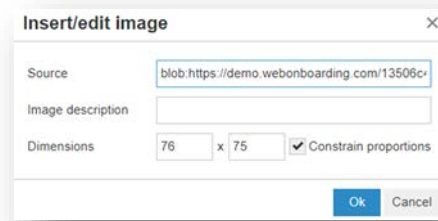


Figure 10.1.1.4

Complete list of email templates

Email Template	Target Recipient
Welcome to onboarding; offer is available to Onboarder	Onboarder
Amended offer is available to Onboarder	Onboarder
Request a manager sign-off an offer	Hiring Manager
Start date confirmed by the Onboarder	Process Owner
Onboarder requested a change to the start date	Process Owner
Offer authorisation rejected by manager	Process Owner
Induction plan made available to Onboarder	Onboarder
Welcome email to new employee	Onboarder
Reminder for the Manager or HR to sign-off the offer	Hiring Manager
Reminder for Onboarder to confirm their start date	Onboarder
Email reminder to manager/HR regarding tasks	Operator
Request to reset your password	Operator
Onboarder start date change request approved	Onboarder
Onboarder start date change request rejected	Onboarder
Onboarder induction completed	Onboarder
Your login to webonboarding is ready	Operator

11.0 Bulk Operations

The **Bulk Operations** section has been designed to reduce the HR overhead needed to bring in multiple Onboardees to an organisation at the same time. This feature allows **Operators** to upload a CSV file containing the details of Onboardees sourced from external data. Once the uploaded data is reviewed, offer letters and contracts can be issued to the Onboardees. This section will also allow for exporting of Onboardees details in bulk so that all the information can then be uploaded into a HR/Payroll system.

11.1 Bulk Import

11.1.1 How to Import Multiple Onboardee Details

- 1 Navigate to **Bulk Operations** in the **Menu**
- 2 Click **Import**
- 3 Click **+ New Import**
- 4 Enter a **Name** **1** for the import
- 5 Click on **Choose file** **2** and navigate to where you have saved your **CSV File**

Import Details

Name* **1**

CSV File* No file chosen **2**

Column Mapping

Preset:

CSV Column	Mapped To	Format	Description
No CSV file selected or no CSV columns			

Figure 11.1.1.1

- 6 **Double click** on the file to begin the upload
- 7 The next stage is to map the column headings in the **CSV file** to the Field headings in the **Onboardee** record of webonboarding
- 8 Click on the drop down menu along side the CSV heading and select the corresponding Onboardee field (see figure 11.1.2)

Import Details

Name*

CSV File* Bulk upload onboardees.csv

Column Mapping

Preset: No Presets Saved

CSV Column	Mapped To	Format	Description
Title+T34D2A1:O35	<input type="text" value="Title"/> <input type="button" value="x"/>	Valid Values: REV, DR, MS, MSTR, MR, PROF, MISS, MRS	Personal details: title
Forename	<input type="text" value="Forename"/> <input type="button" value="x"/>	Max length: 100	Personal details: forename
Last Name	<input type="text" value="Surname"/> <input type="button" value="x"/>	Max length: 120	Personal details: surname
Email Address	<input type="text" value="Email"/> <input type="button" value="x"/>	Max length: 254 Constraint: Must be a correctly formed email	Address: email address used for sending the portal details and re...
Job Title	<input type="text" value="Title"/> <input type="button" value="x"/>	Max length: 100 Constraint: Free text	Job offer: title
Start Date	<input type="text" value="Start Date"/> <input type="button" value="x"/>	Format: yyyy-mm-dd	Contract: contract start date
7	<input type="text" value="Select or search column"/> <input type="button" value="x"/>		

Figure 11.1.1.2

- 9 Once the headings have been mapped to the fields, move to the bottom of the screen and click on
- 10 If you wish, you can save the mapping as a preset for future use, if you would like to do this, add a **Preset Name** and then click **Yes** if not, then click **No**

Save Mapping Preset

Do you wish to save the CSV column mapping as a preset for reuse in the future?

Preset name*

Figure 11.1.1.3


- 11 Once the file has uploaded, each record needs to have the **Authorisation**, **Hiring Manager**, **Contract**, **Offer Letter** and **Template** assigned to them. These can either be completed for each individual record or in bulk

The screenshot shows the 'Bulk Value Tools' interface. At the top, there are several dropdown menus for 'Template', 'Contract', 'Offer Letter', 'Hiring Manager', 'Authorisation', and 'Start Date', each with an 'Apply' button. Below this is a table with columns: Forename, Surname, Email, Authorisation, Hiring Manager, Start Date, Job Title, Contract, Offer Letter, and Template. The table contains five rows of data. The 'Authorisation', 'Contract', and 'Offer Letter' columns for all rows are highlighted in red, indicating they are mandatory. At the bottom of the interface, there are input fields for 'HR Email*' and 'HR Telephone*', both with a 'This field is required' message. There are also buttons for 'Create Onboarder' and 'Delete Selected'.



Forename	Surname	Email	Authorisation	Hiring Manager	Start Date	Job Title	Contract	Offer Letter	Template
Mable	Morrison	mable@email.com			04/09/2017	Secretary			
Robert	Johnston	rob@email.com			04/09/2017	Support Executive			
John	Jones	John@email.com			04/09/2017	Support Executive			
Daisy	May	daisy@email.com			04/09/2017	Groom			
Duncan	Ridges	dunc@email.com			04/09/2017	Support Executive			

Figure 11.1.1.4



Note: Fields that are highlighted in red  are **mandatory** and will need to be completed before the Onboarder records can be created

11.1.2 How to Populate Missing Fields by Individual Record

- 1 Go to the record that you want to amend
- 2 Click the  in the field that needs to be completed
- 3 Click the **arrow** ▼ to open the selection menu
- 4 Click on the relevant option from the list
- 5 Repeat these steps for all required fields
- 6 Enter the **HR Email** address at the bottom of the screen along with the **HR Telephone** number
- 7 Select either **all** or a **selection** of Onboardees using the **Tick Box**
- 8 Click on  Create Onboarder

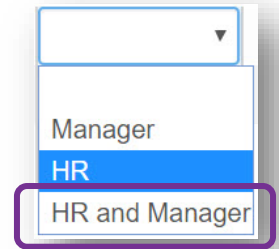


Figure 11.1.2.1

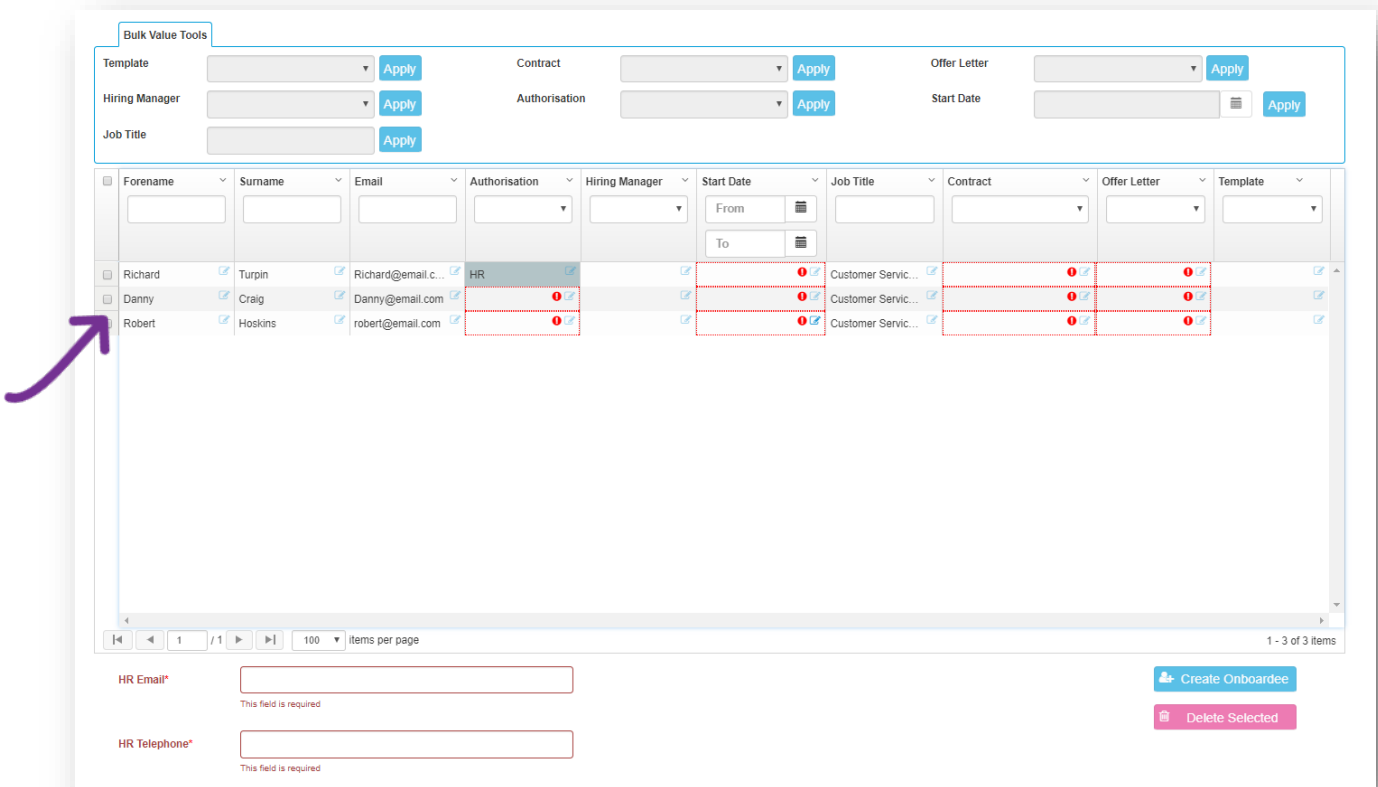


Figure 11.1.2.2

- 9 Individual records for each Onboarder will now be created

11.1.3 How to Populate Multiple Missing Fields

- 1 Any fields that have not been completed during the upload can be populated using the **Bulk Upload Tools** section at the top of the **upload grid**
- 2 Select the records that you want to populate using the **Tick box**

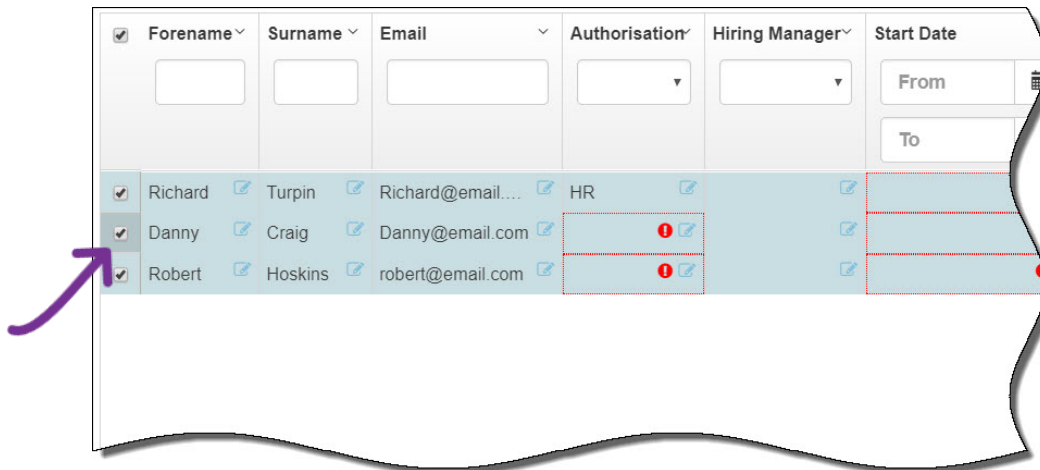


Figure 11.1.3.1

- 3 Click on each of the fields in turn and select the information that you want to apply to all of the Onboarder records

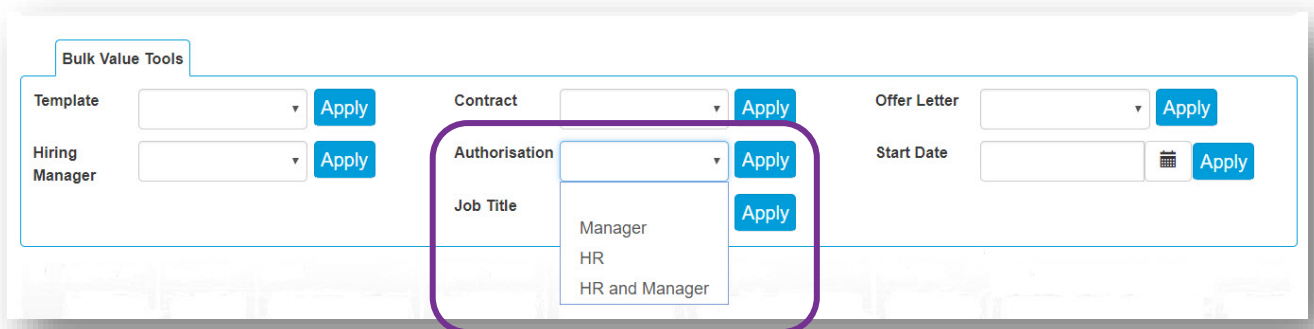



Figure 11.1.3.2

- 4 Enter the **HR Email** address at the bottom of the screen along with the **HR Telephone** number
- 5 Click on

- 6 All Onboarder records will now be created
- 7 Click  to on the pop up window, to return to the **Imports** list
- 8 Select **Onboarder** from the menu to view and/or amend the newly imported Onboarder records

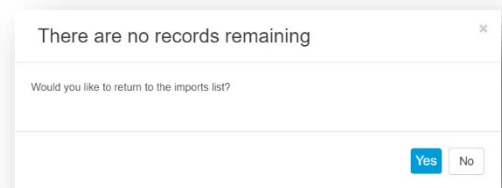


Figure 11.1.3.3

11.2 Bulk Export

The **Bulk Export** function is a great tool to retrieve all the Onboardees key information into a CSV file ready to import to a HR and Payroll system.

Navigate to **Bulk Operations** in the **Menu**

- 9 Click **Export**
- 10 Click **+ New Export**
- 11 Enter a **Name** **1** for the export – (this field is mandatory)
- 12 To export the information for a specific **Onboardee**, search for the name in the Onboardee field **2** – leave this blank for all records to be returned
- 13 If required, use the **Status** **3** drop down menu to filter your results
- 14 Enter the **Start and End Dates** **4** for the period of time you want to run the report for (this will return any Onboardee data that had a contract start date between these two dates)
- 15 Select the columns that you would like to bring into your **Export**, use the **>** to bring individual Columns over or **>>** to bring all columns over. These can also be dragged and dropped into a different order once selected.

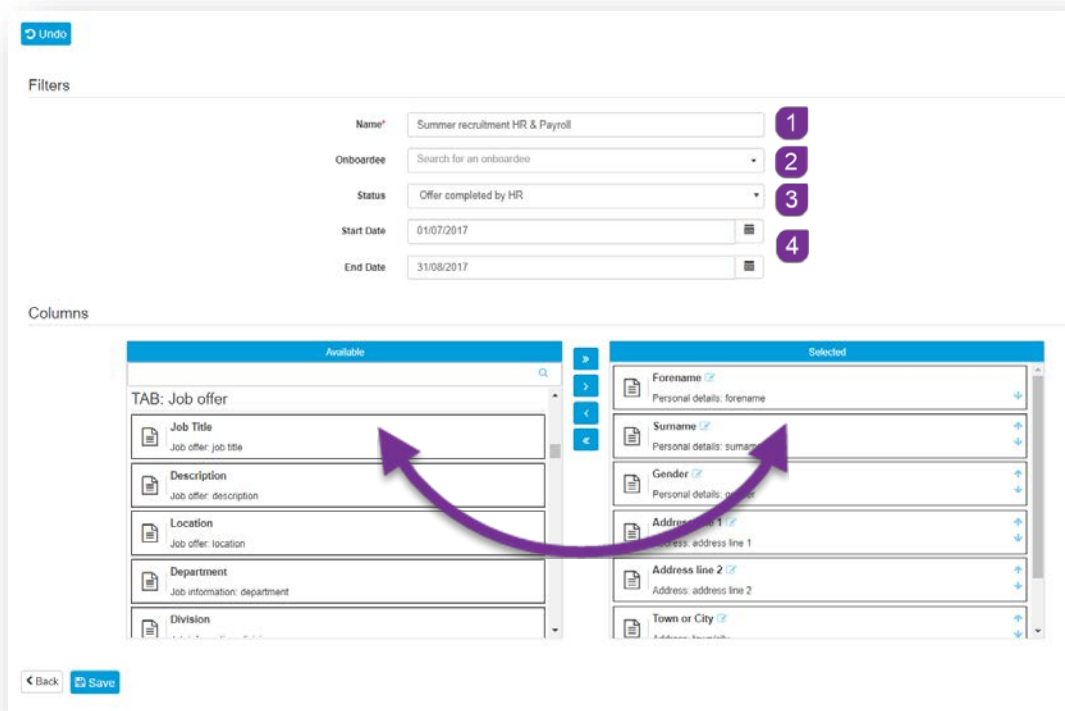





Figure 11.2.1

- 16 Click  to keep your changes
- 17 Once saved, go to the top of the screen and click 
- 18 The screen will change, click  to see the data that has been returned

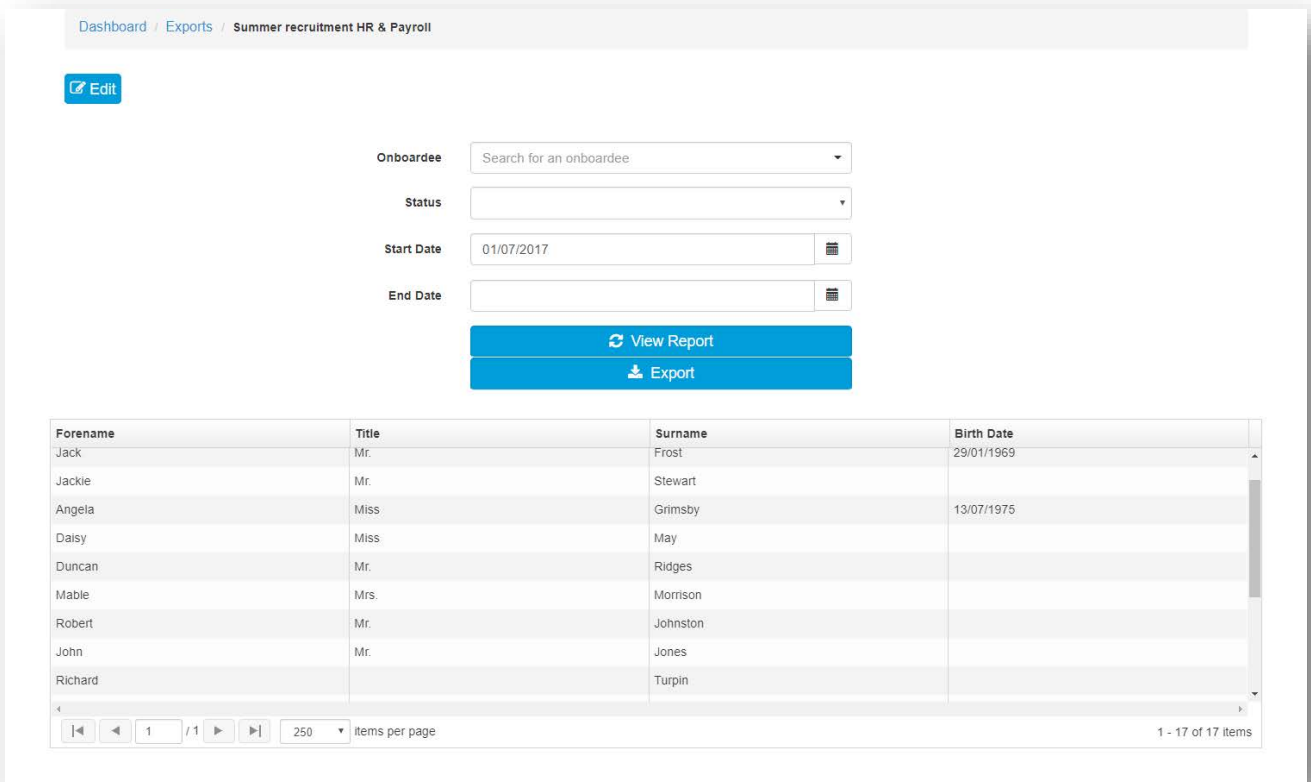



Figure 11.2.2

- 19 Click  to save the data to a **CSV**
- 20 This can be retrieved from your PC's **Downloads** folder

11.3 Bulk Authorise

The Bulk Authorise screen will give you a complete list of all Onboarder records that are waiting to be authorised, and have documents generated. From here, you can either authorise records individually or altogether.

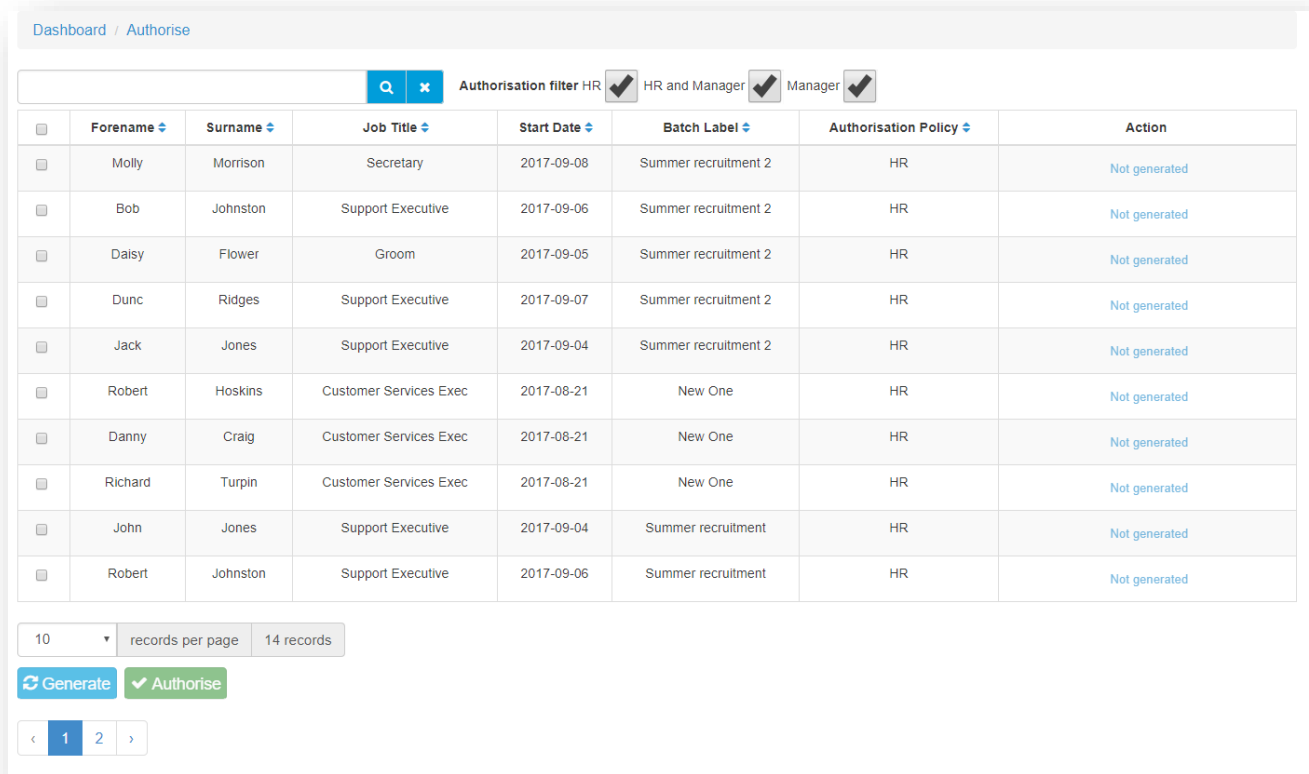


Figure 11.3.1

11.3.1 How to Authorise Onboarder Records

- 1 If required, run a filter to select an individual record **1**, or records by who the authoriser is e.g. HR **2**, HR and Manager **3** or Manager **4**
- 2 Select the **Onboarder(s)** record that you would like to **Authorise**, using the tick box **5**

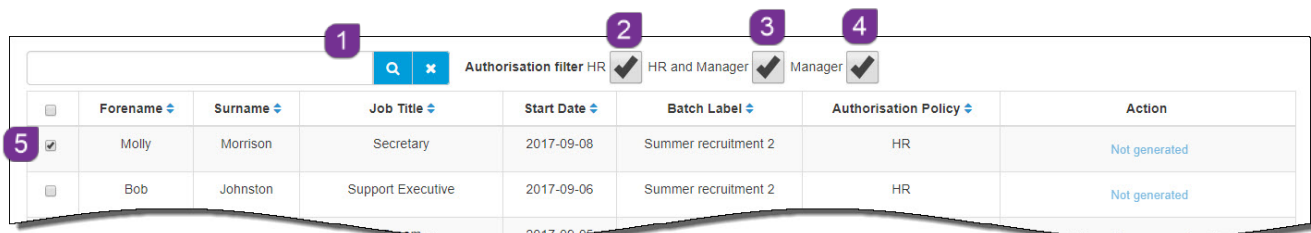



Figure 11.3.2

- 3 Once selected, click the  button at the bottom of the screen to generate the required documentation

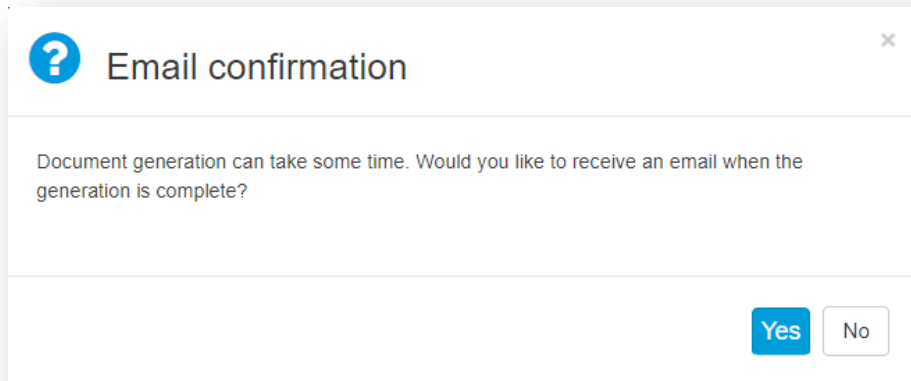


Figure 11.3.3

- 4 The screen will ask if you require email notification when this is complete. Click **Yes** or **No** to confirm your requirement
- 5 The screen will confirm once this is complete and will update the **Action** column in the **Onboardees** record

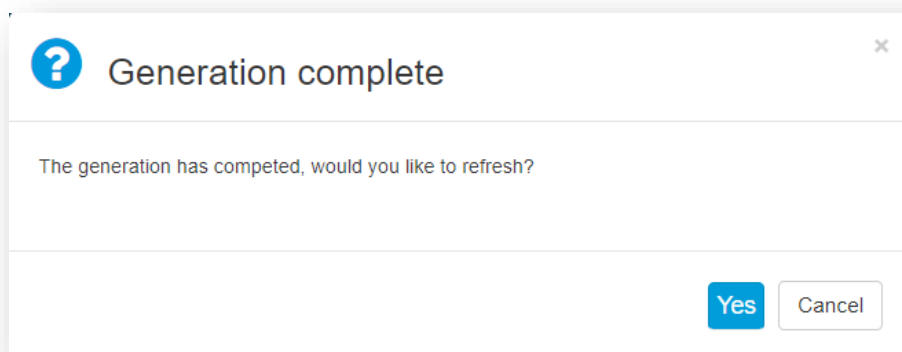



Figure 11.3.4

- 6 Click **Yes** to continue
- 7 The **Action** column in the **Onboardees** record has updated to show which documentation has been generated

	Forename	Surname	Job Title	Start Date	Batch Label	Authorisation Policy	1	Action	2
	Daisy	May	Groom	2017-09-05	Summer recruitment	HR		<input type="button" value="Contract"/>	<input type="button" value="Offer"/>

Figure 11.3.5

- 8 Click on either the **Contract** **1** or **Offer** **2** button to view the document
- 9 Click the  button to complete this process and instigate the generation of user ID's for **Onboardee** access to the webonboarding Portal

12.0 Reports

Your webonboarding account includes a library of pre-written reports that can be run at any time. Extract and analyse Onboarder data as you view or export the information ready to import to a different application if required.

Navigate to **Reports** in the **Menu**, click on **Reports** to see a list of pre-written reports that you can run.

They are:

- **Time to Complete** – shows the amount of days taken from offer made to completion
- **Withdrawals** – shows offers that have been withdrawn by HR from Onboarder and the reason
- **Feedback** – shows feedback questions and completed answers
- **Task List** – shows a complete list of tasks and their status
- **Equal Ops** – shows anonymous details of Onboarders by **Age**, **Gender**, **Ethnicity**, if **Disabled** and **Disability**
- **Emails** – shows details of all automated emails that have been generated and sent via **webonboarding**

12.1 How to Run a Report

- 1 Click on the report that you would like to view
- 2 Enter the date period that the report is to cover 1
- 3 Click **Get Report Data** 2

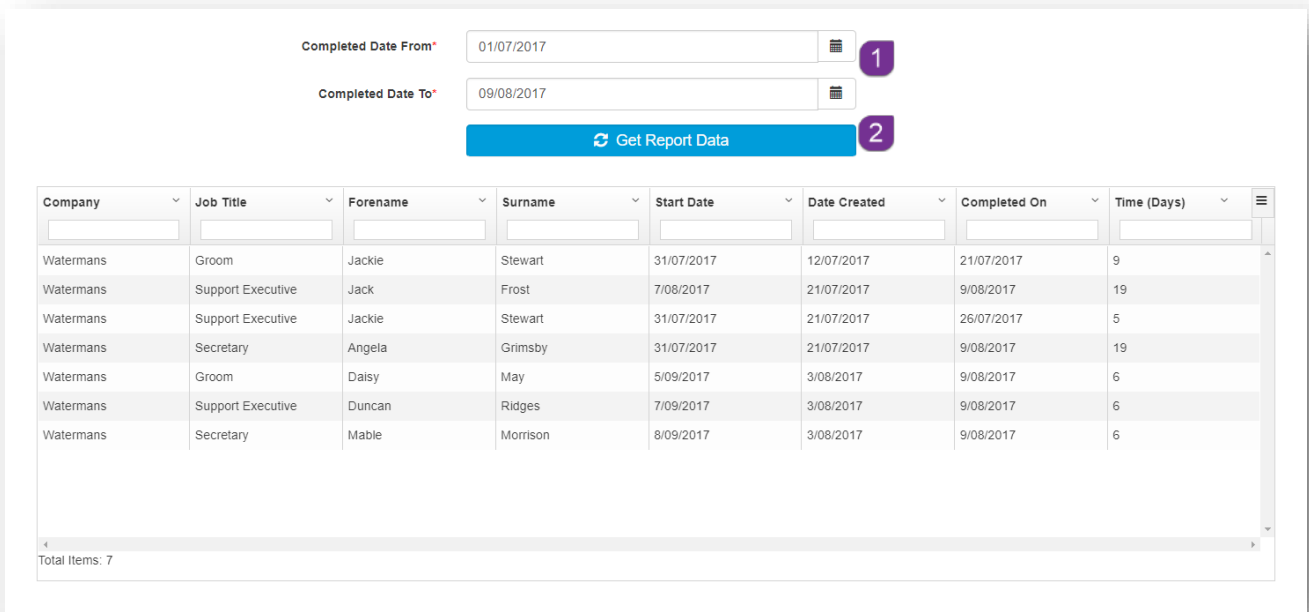


Figure 12.1.1

Once the data has been returned, filters 3 can be set on screen before the data is exported to **CSV** or **PDF**. Simply type the information you want to filter on, in the field at the top of the relevant column.

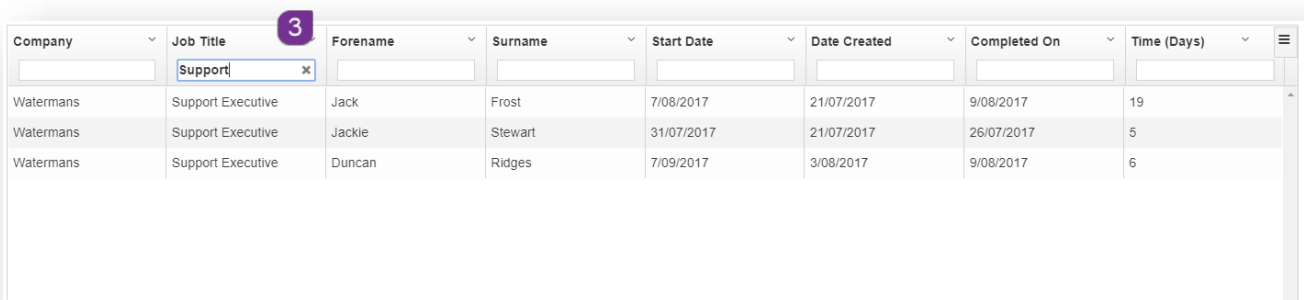


Figure 12.1.2

12.2 How to Export the Report

Once you have the desired information in the report results, you can then export the data to either a **CSV** file or a **PDF**.

- 1 Click on the top right corner of the report grid

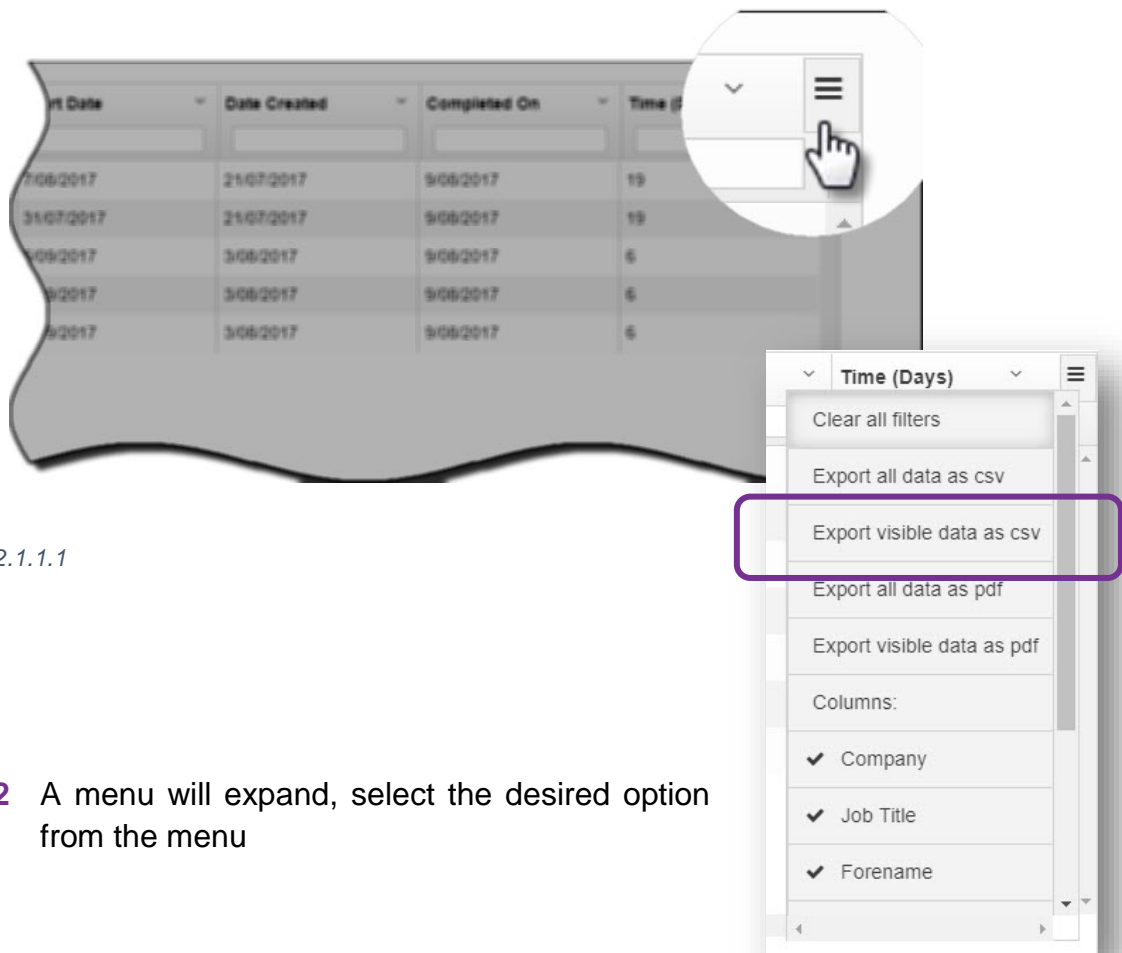


Figure 12.1.1.1

- 2 A menu will expand, select the desired option from the menu

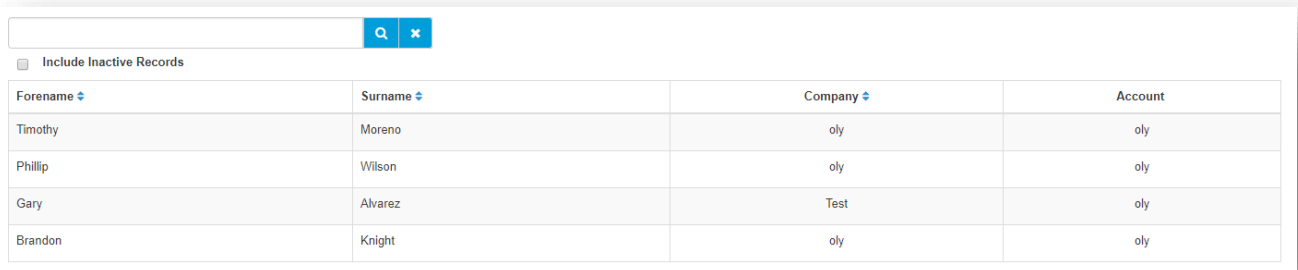
Figure 12.1.1.2

13.0 Feedback

Once the Onboarder has joined the company, they will have an option in their Onboarder Portal, to give feedback on their complete onboarding experience.

This section will list all Onboarders that have now started, and the feedback that they have given.

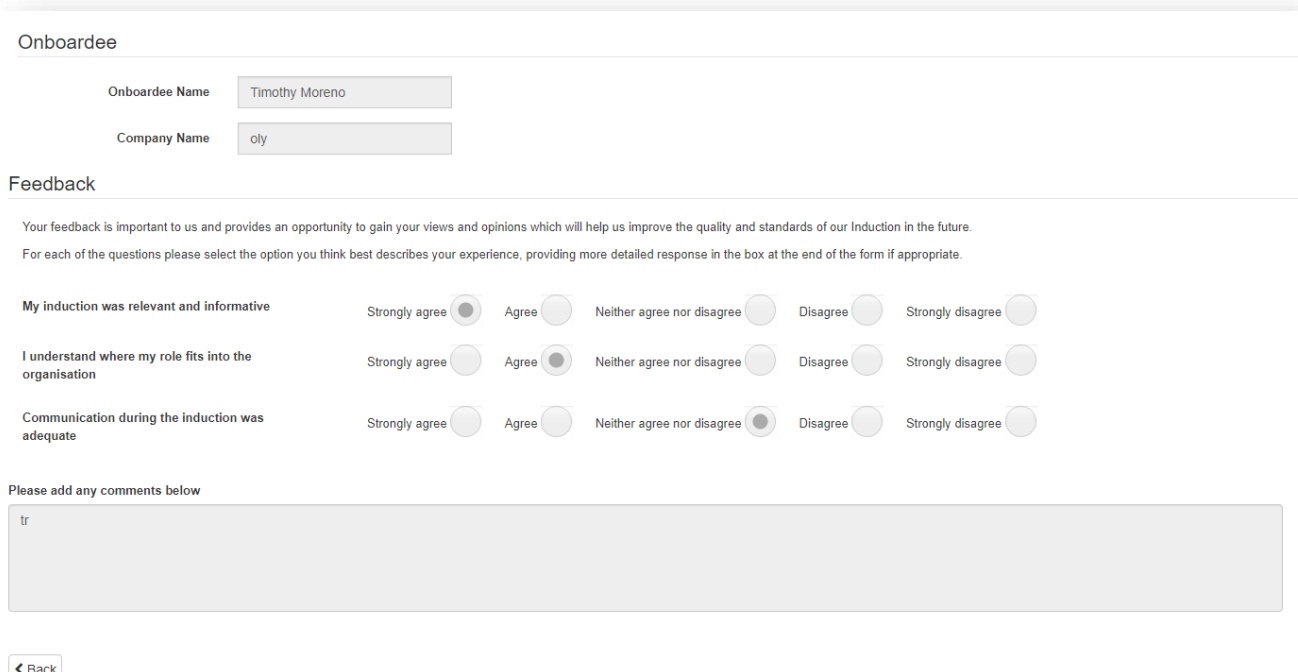
- 1 Click on **Feedback** in the main menu to see a list of all Onboarders that have completed the **Feedback Questionnaire**



Forename	Surname	Company	Account
Timothy	Moreno	oly	oly
Phillip	Wilson	oly	oly
Gary	Alvarez	Test	oly
Brandon	Knight	oly	oly

Figure 13.0.1

- 2 Click on the name of an **Onboarder** to see the completed details of the **Feedback Questionnaire**



Onboarder

Onboarder Name: Timothy Moreno

Company Name: oly

Feedback

Your feedback is important to us and provides an opportunity to gain your views and opinions which will help us improve the quality and standards of our Induction in the future.

For each of the questions please select the option you think best describes your experience, providing more detailed response in the box at the end of the form if appropriate.

My induction was relevant and informative

Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

I understand where my role fits into the organisation

Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

Communication during the induction was adequate

Strongly agree Agree Neither agree nor disagree Disagree Strongly disagree

Please add any comments below

tr

[Back](#)

Figure 13.0.2

Support

Technical

If you experience a technical difficulty with the webonboarding system, please email your administrator or contact our Support Team on the details below:



E: customer.support@webonboarding.com

Call: 0800 170 0173

If you call outside of office hours please leave a message with:

- **Your name and email address**
- **Your company name**
- **A contact telephone number**
- **A brief explanation of the problem.**