# User Guide
## Administrators

webonboarding
always exceed expectations

# Contents

# 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.

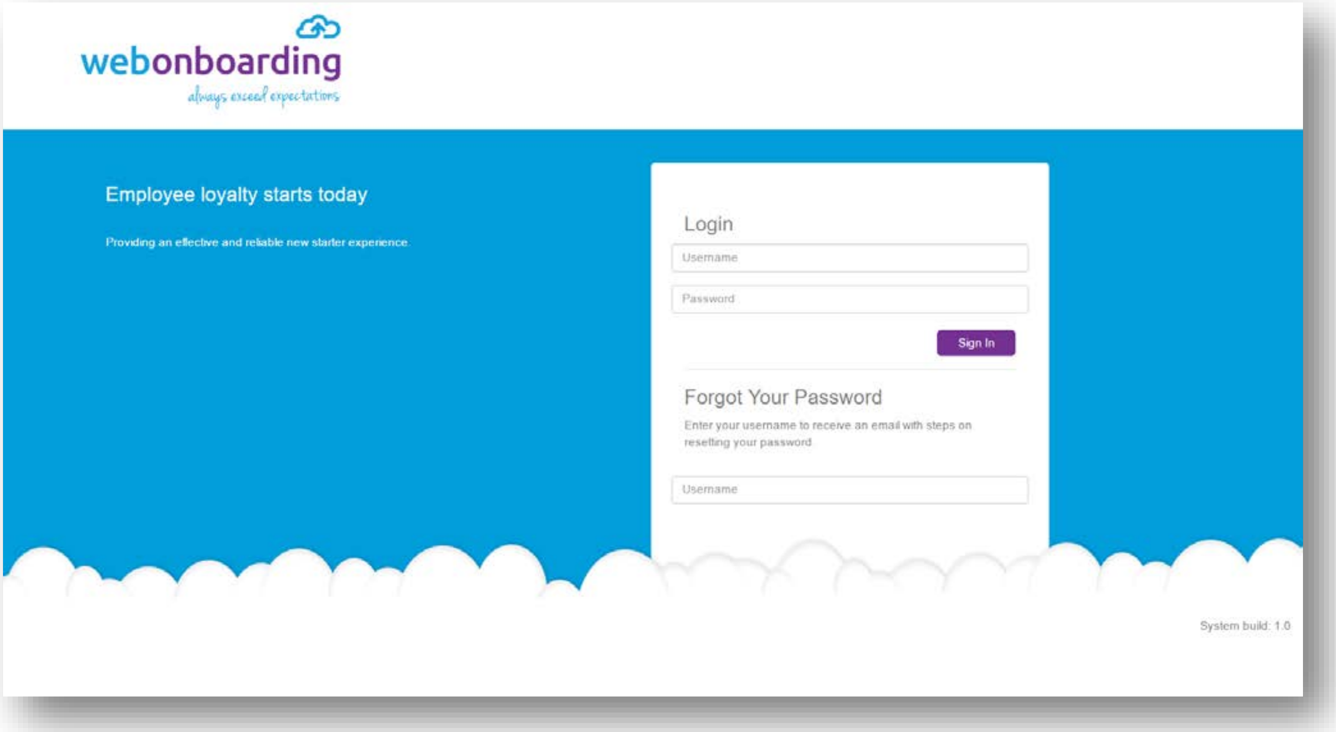



*Figure 1.0.1*

# 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

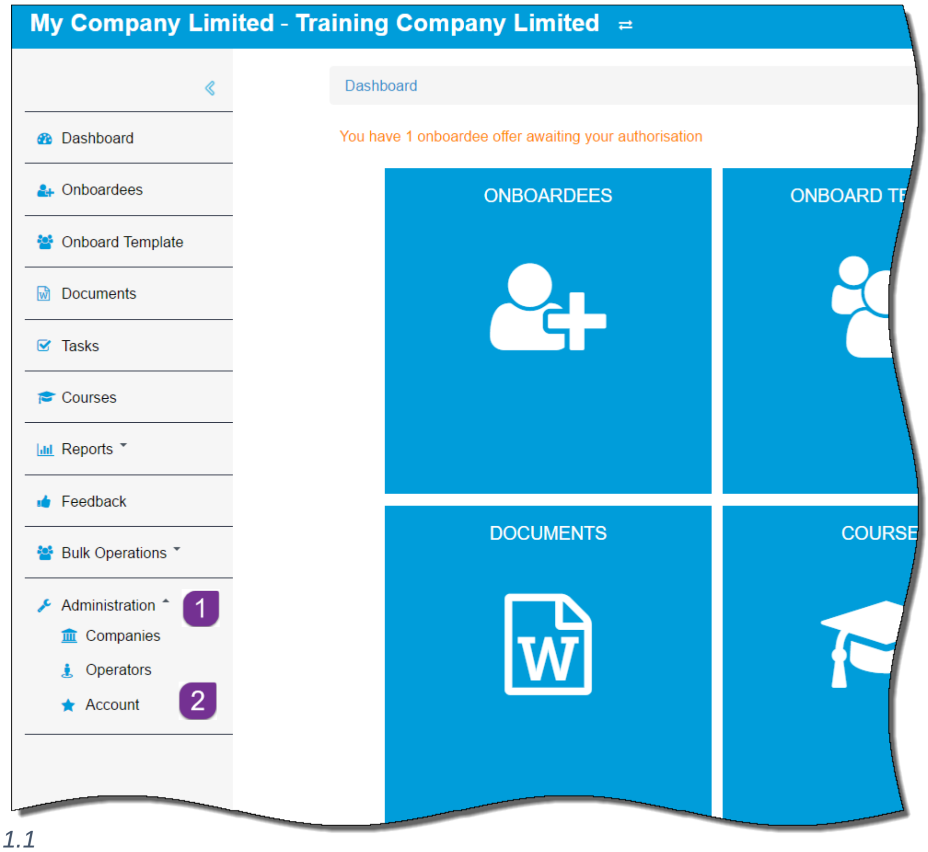



*Figure 2.1.1.1*

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

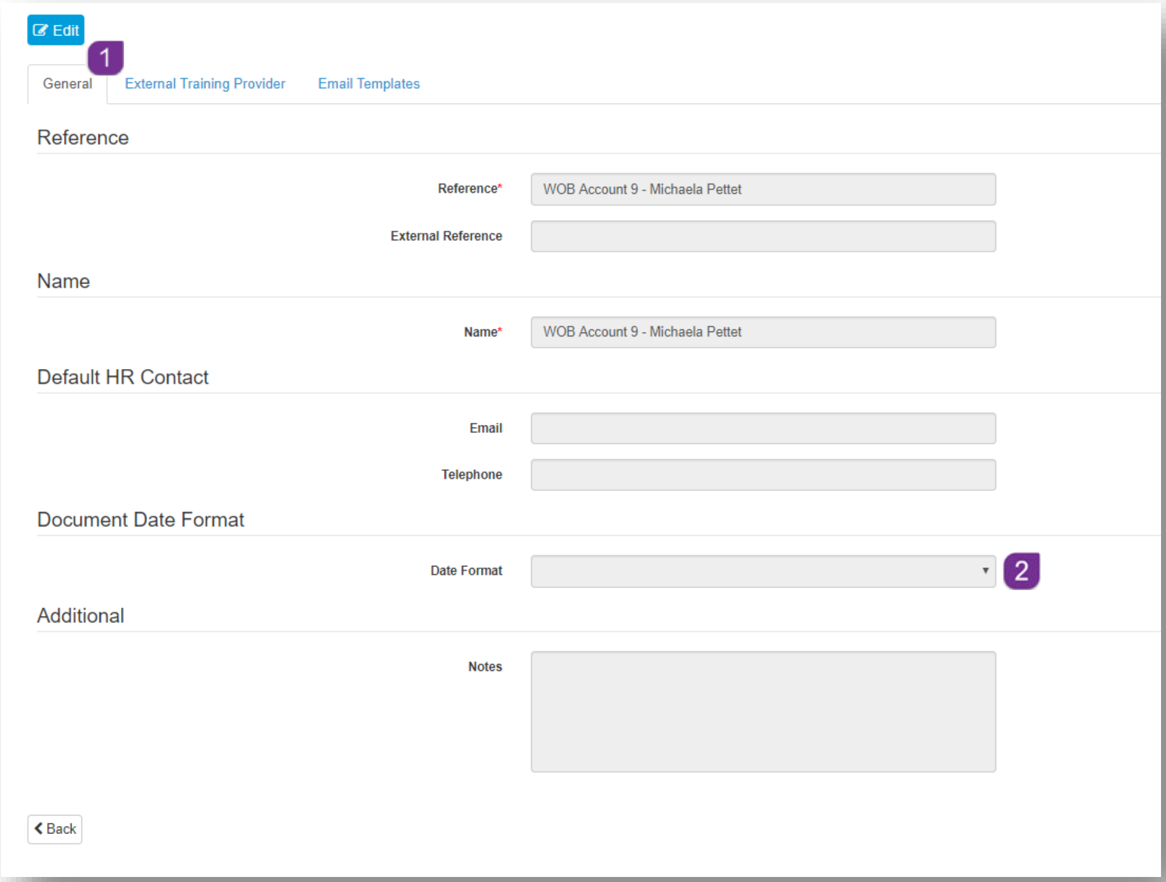



*Figure 2.1.2.1*

1 The **General** tab holds your account information and shows your organisations details 1

2 Click Edit 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

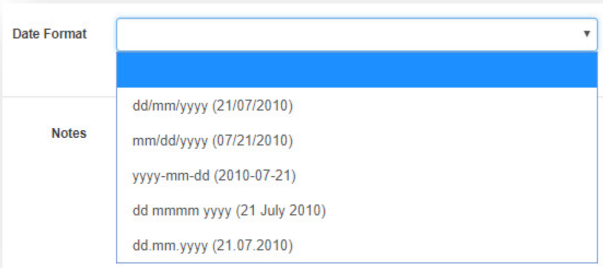



*Figure 2.1.2.2*

### 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

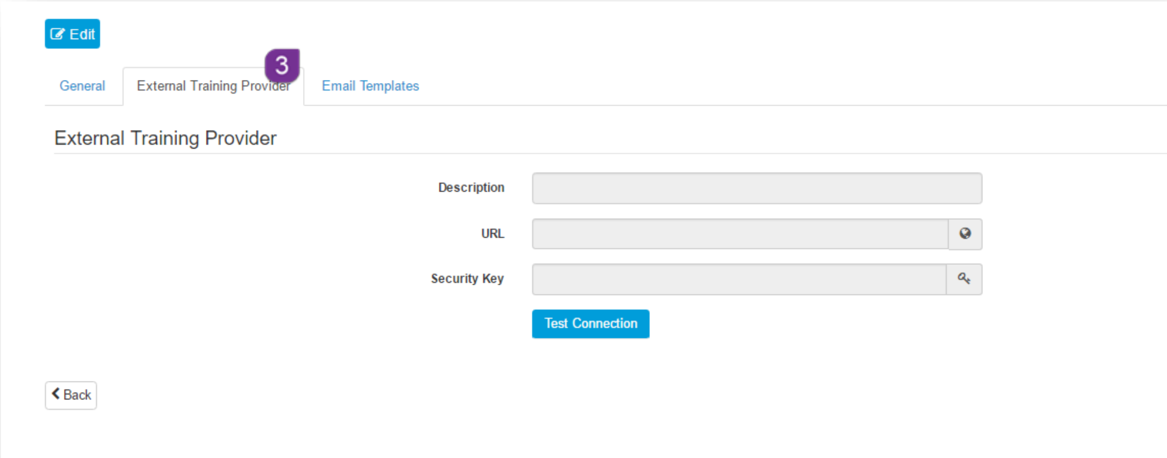



*Figure 2.1.3.1*

### 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

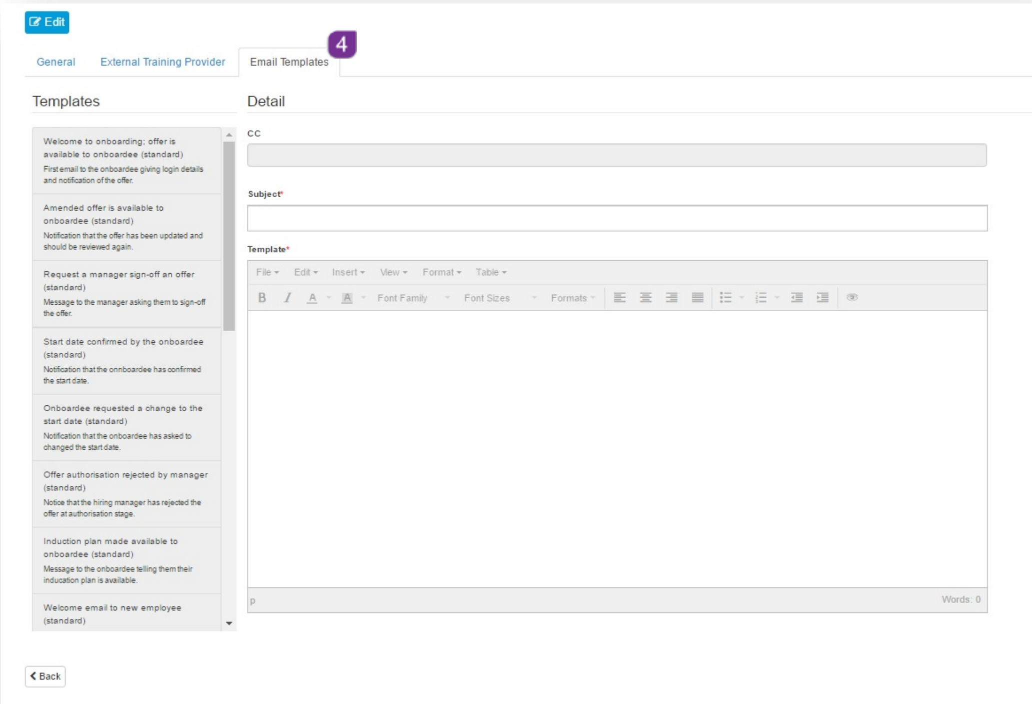



*Figure 2.1.4.1*

## 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 **Onboardee 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, + Add Company button

4 In the **General** tab, enter a **Reference** 1 for the company

5 Enter the **Name** 2 of the company

6 Enter a **Description** 3 if desired

7 Ensure that the **Active** 4 box is ticked

8 Enter the contact details for **HR** 5

9 Click on the **Date Format** drop down menu to set the format of dates in documents eg. dd/mm/yyyy 6

10 If you would like Onboardees to have the option to request a new start date, ensure that the **Request Alternative Start Date** box is ticked 7

11 The **Account Name** field will populate with the **Header Company** name once the record has been saved 8

12 Select the **Address** tab and enter the company address

13 Click, Save to keep your changes

14 Repeat from **step 3** to create another company record if you manage recruitment for multiple companies

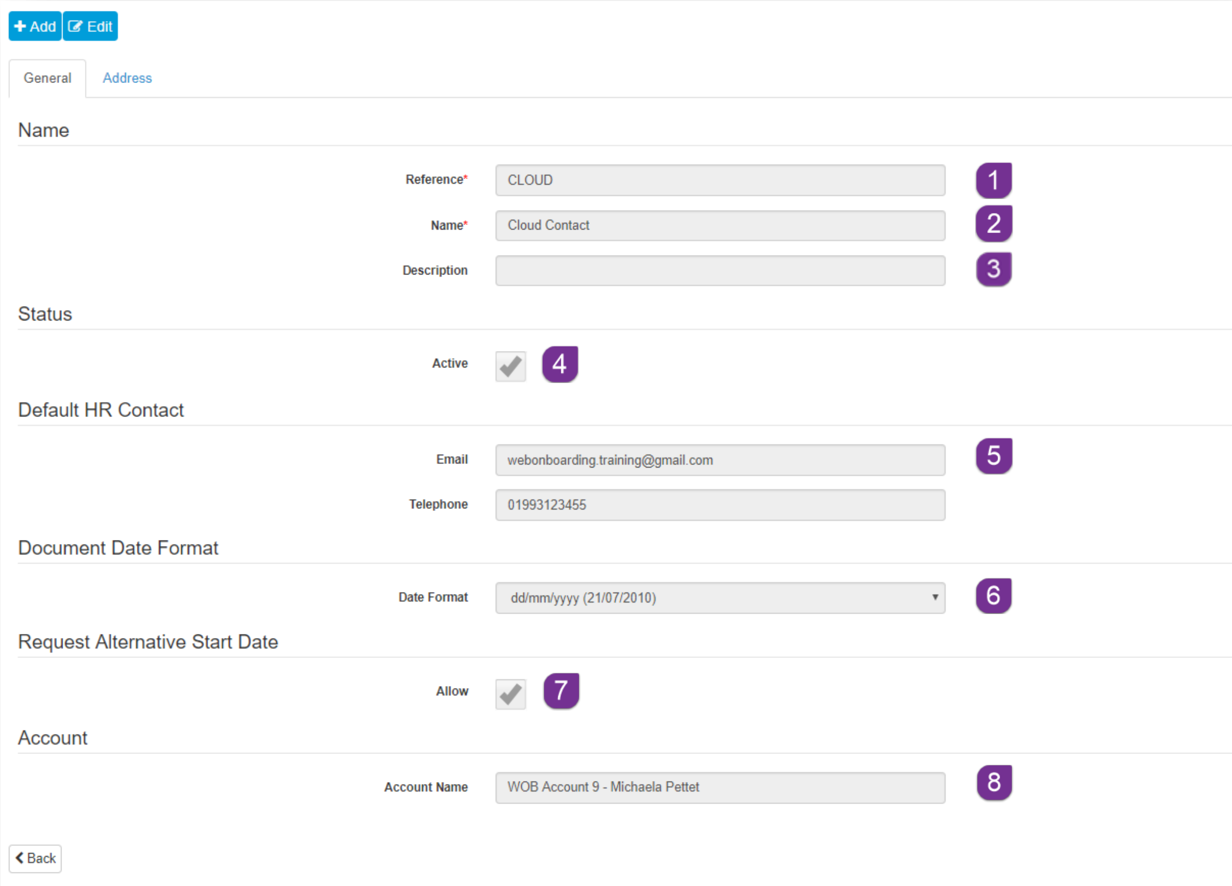



*Figure 2.2.1.1*

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

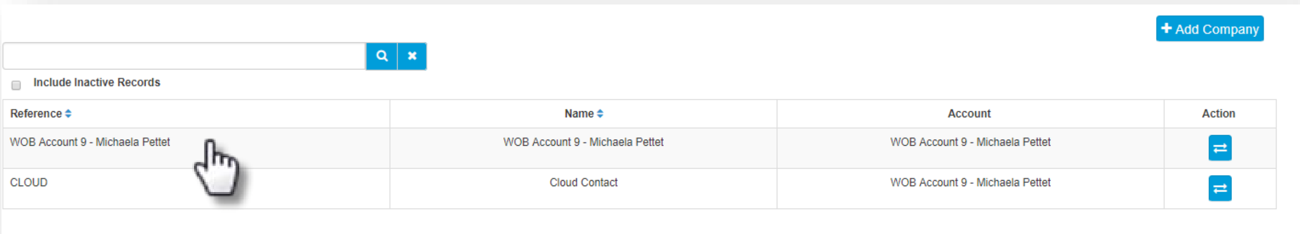



*Figure 2.2.1.2*

**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. Onboardee 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**

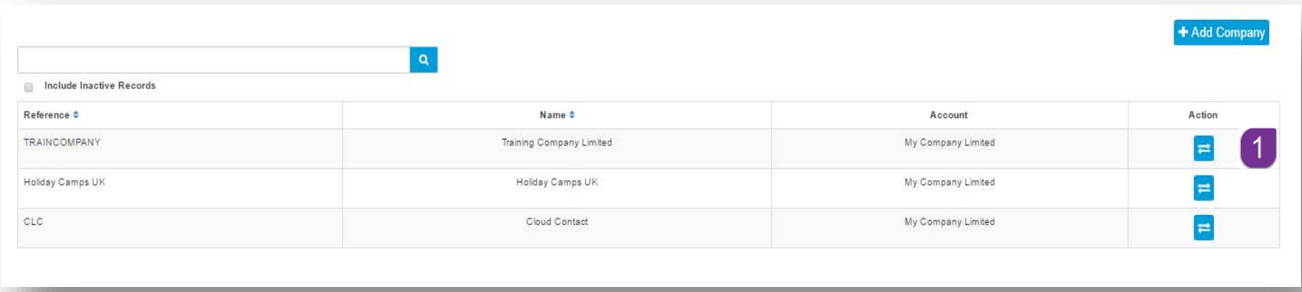



*Figure 2.2.4.1*

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

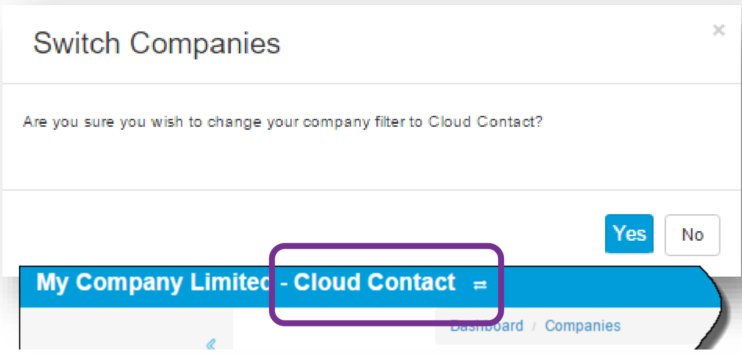



*Figure 2.2.4.2*

## 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

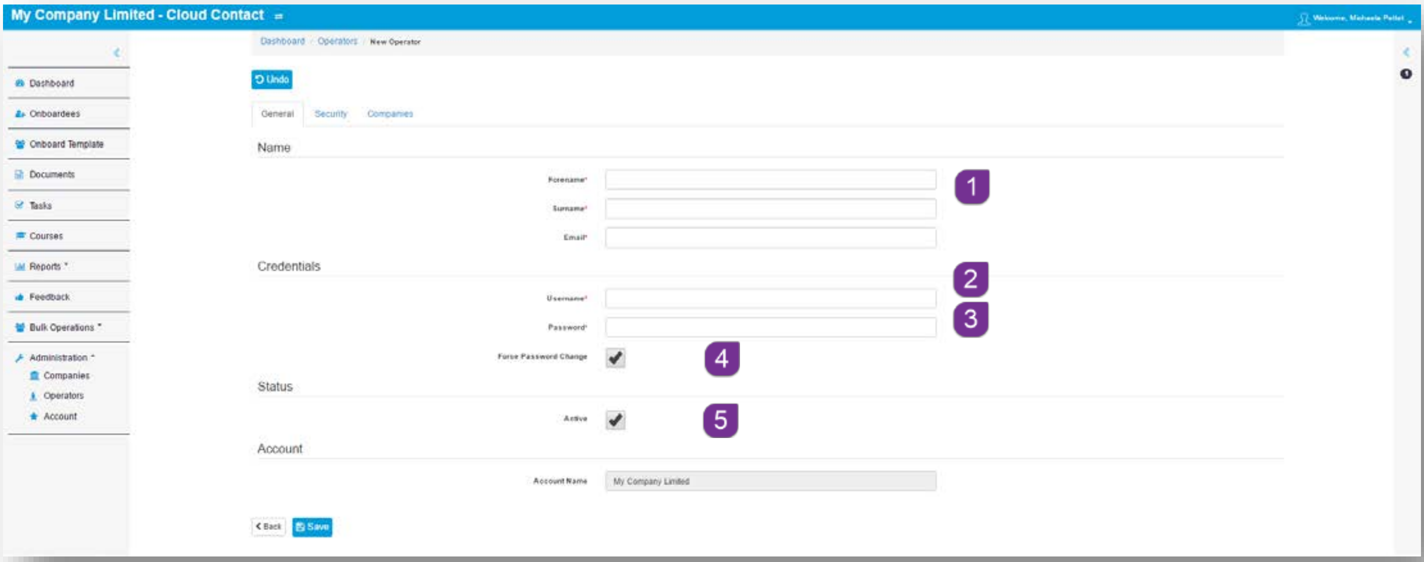



*Figure 2.3.1.1*

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.

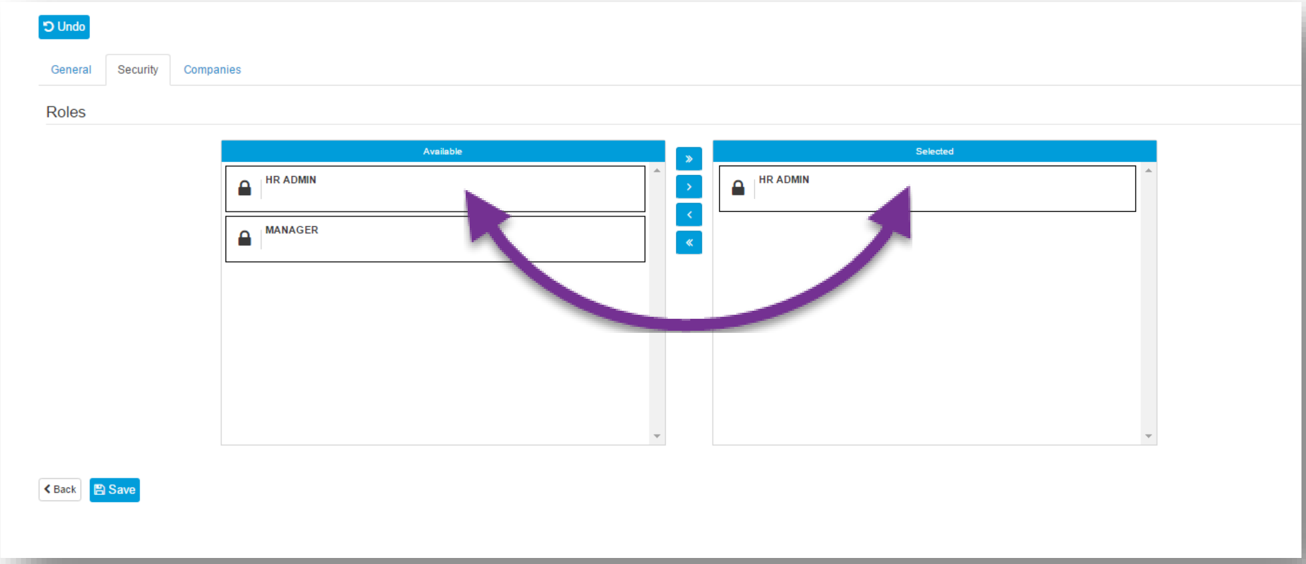
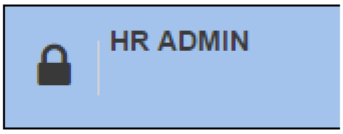



*Figure 2.3.1.2*




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 **Onboardee** 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**

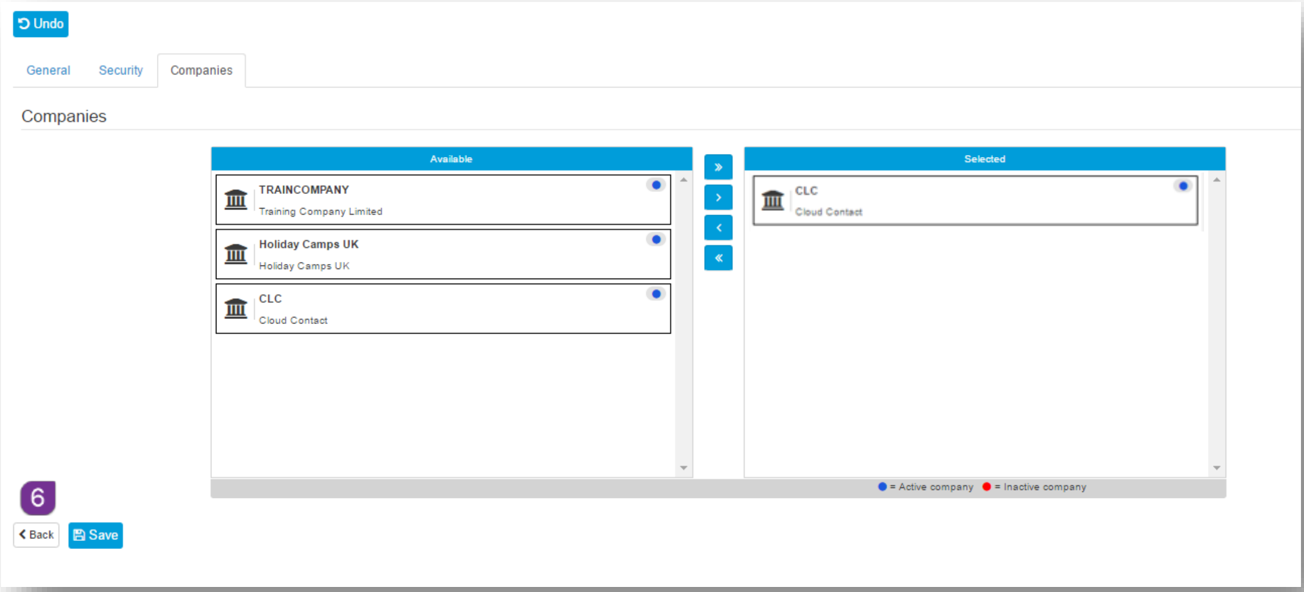



*Figure 2.3.1.3*

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, Save to keep your changes

14 Click on the **Back** 6 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 |
|---|---|---|---|
| **The contract of employment which is issued to all employees regardless of employment status.**<br><br>Some organisations will have a different contract for managers or directors than for employees.<br><br>The contract will be signed by the hiring organisation and by the Onboardee. | **The formal offer of employment which usually follows a verbal offer and which accompanies the contract of employment.**<br><br>The letter will be signed by the organisation. There is usually no requirement for the Onboardee to sign this, they will sign the contract. | **1. A document which you send to the Onboardee to complete and return.**<br><br>E.g.<br><br>Confidential Medical Questionnaire<br><br>HMRC checklist<br><br>**2. A document which you want the Onboardee to provide you with.**<br><br>E.g.<br><br>Copy of driving licence<br><br>Copy of Passport<br><br>Copy of Birth Certificate | **A document which you provide to the Onboardee to read as part of their induction or on pre-joining.**<br><br>E.g.<br><br>A policy document or some other document which is required of the Onboardee by the company. |

## 3.1 How to Add Documents

1 From the **Dashboard** or **Menu**, navigate to **Documents**

2 Click, **Documents**

3 Click, + Add Document button

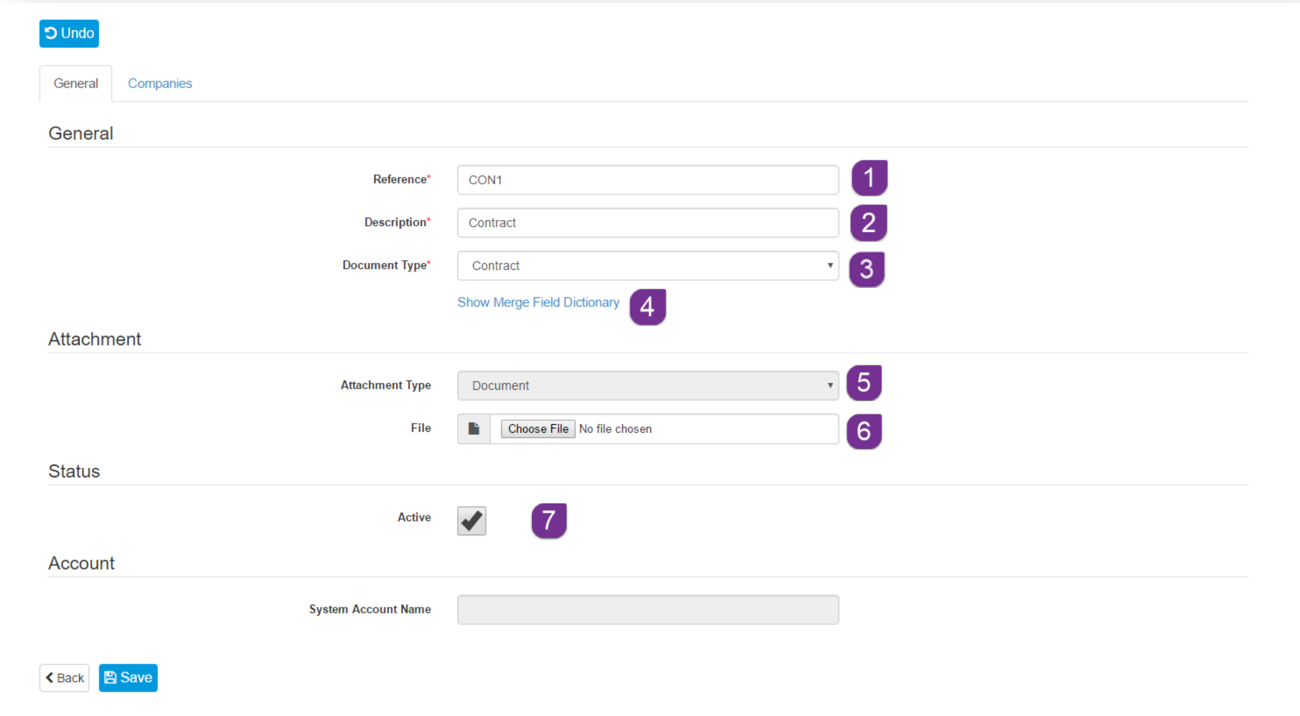



*Figure 3.1.1*

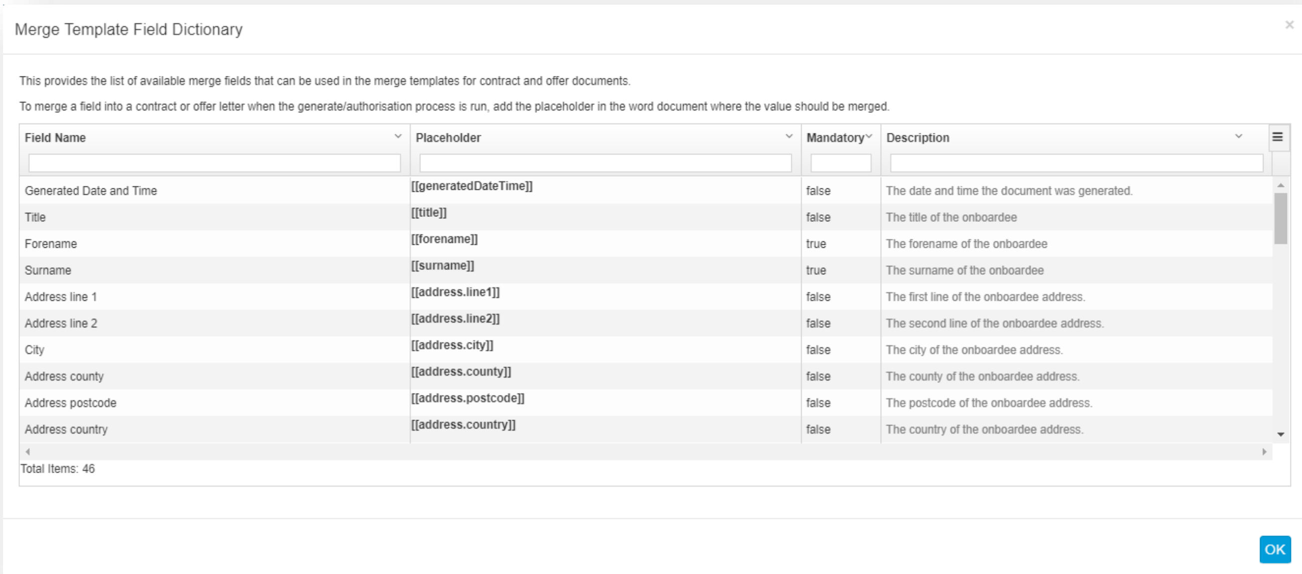
4 In the **General** tab enter a short **Reference** 1 for your document

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**


Merge Template Field Dictionary

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

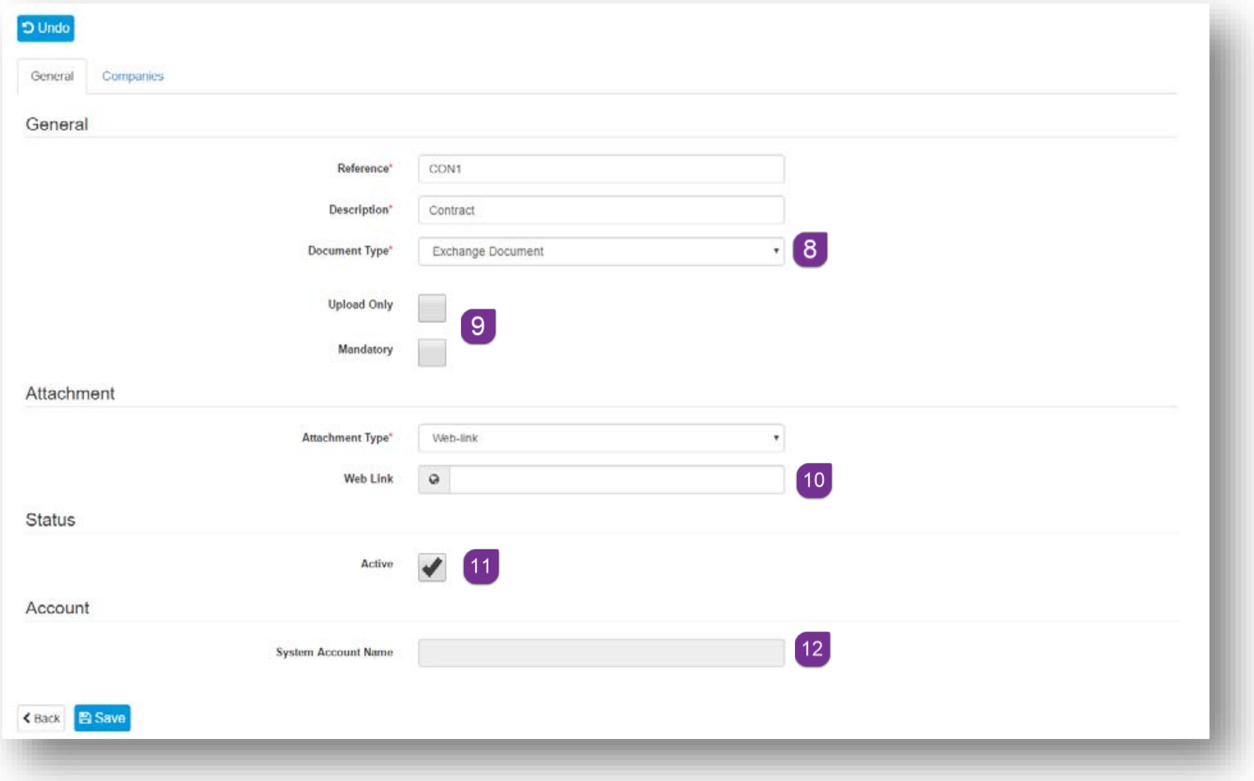



*Figure 3.1.3*

13 You can indicate if the document is to be **Uploaded** only by the **Onboardee** 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

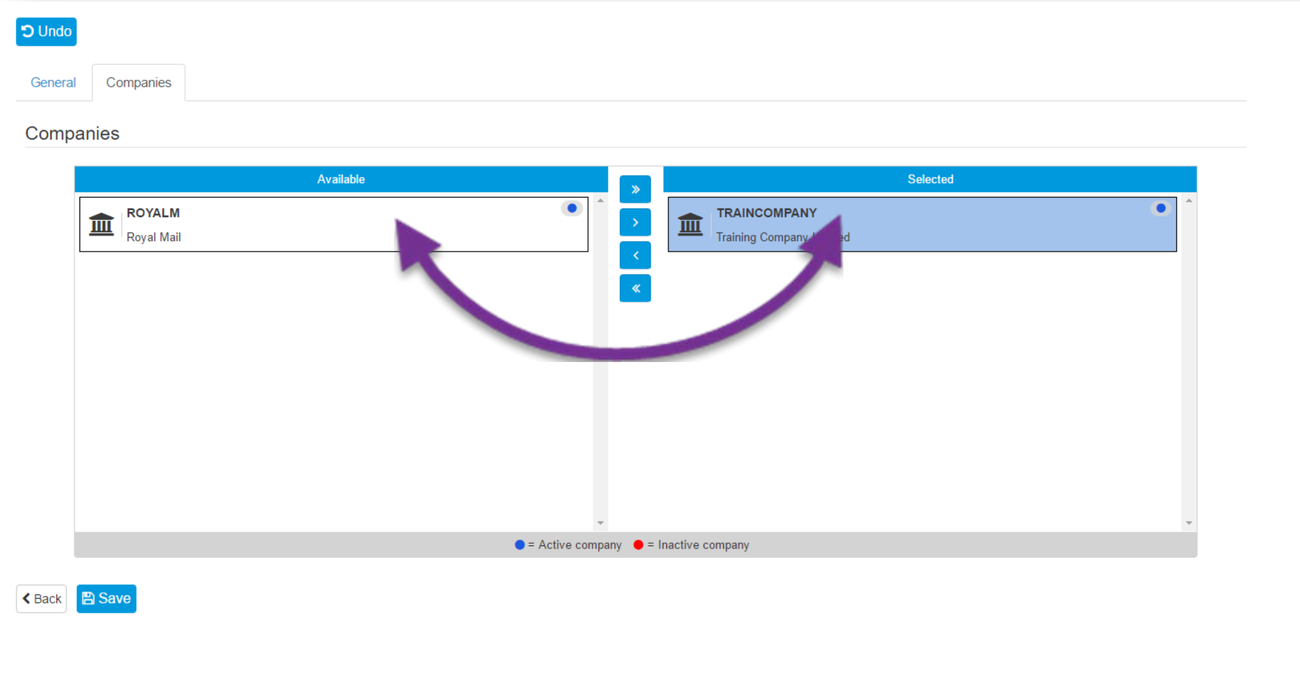



*Figure 3.1.4*

**21** Click, Save to keep the changes

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

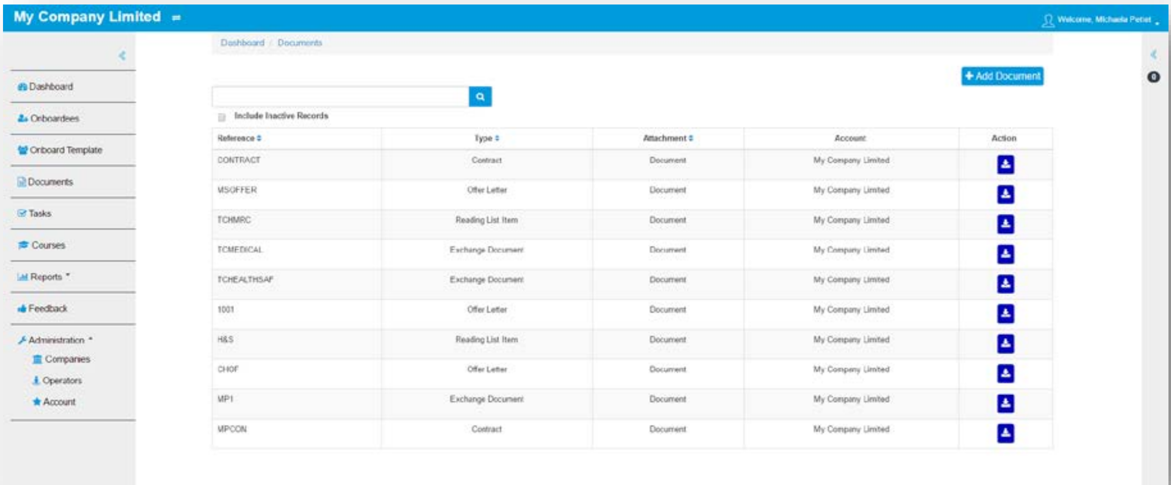



*Figure 3.1.5*

### 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

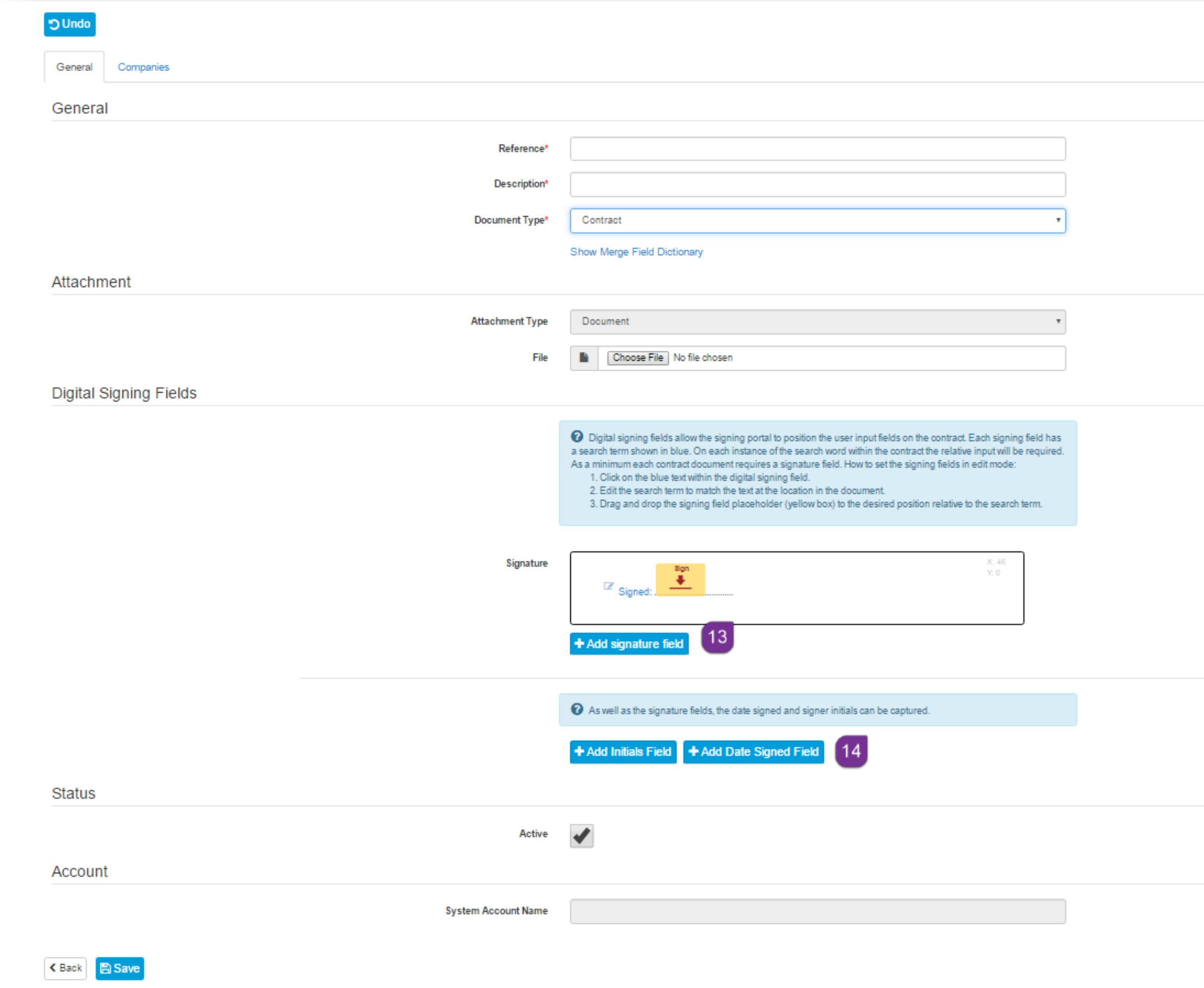



*Figure 3.1.6*

# 4.0 Tasks

Tasks are actions that need to be completed prior to the Onboardee'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 **Onboardee's** start date.
6. Allocate **Who** is responsible and who owns the **Task** by selecting **Manager** or **HR** 5

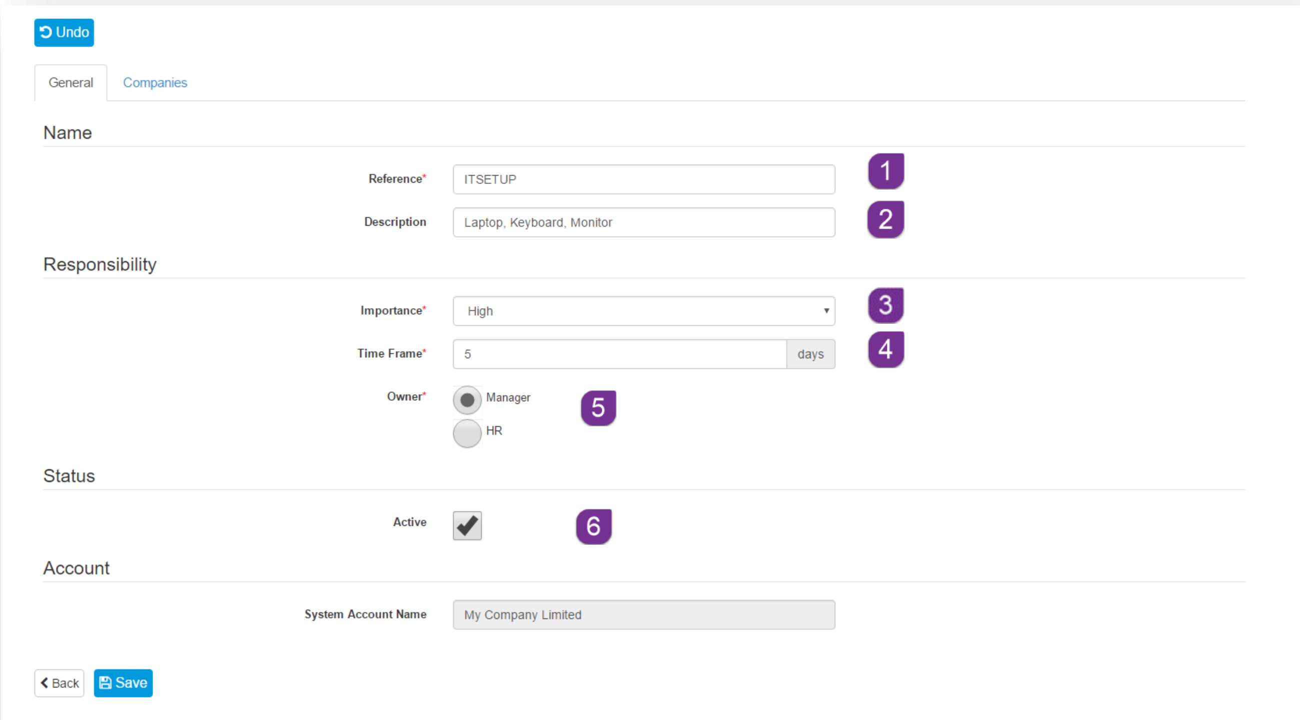



*Figure 4.1.1*

7 Ensure that the **Active** 6 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, Save to keep the changes

12 Click, **Back** or on **Tasks** in the menu to see a list of all tasks, for your account

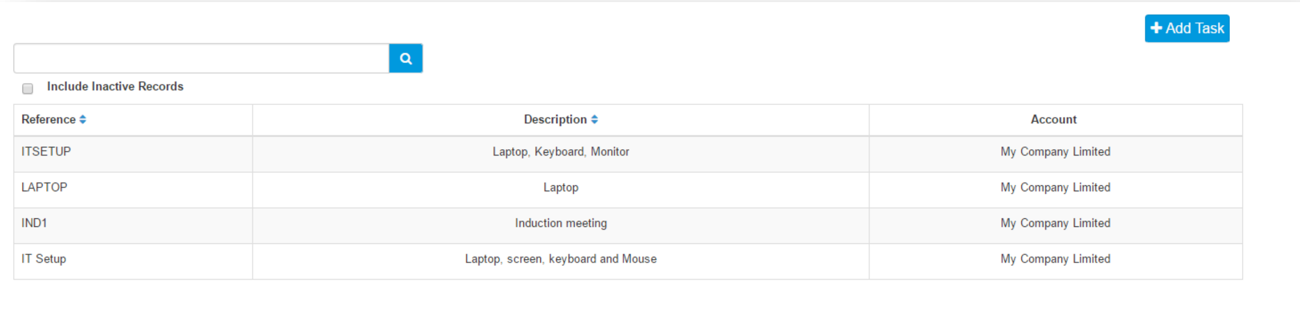



*Figure 4.1.2*

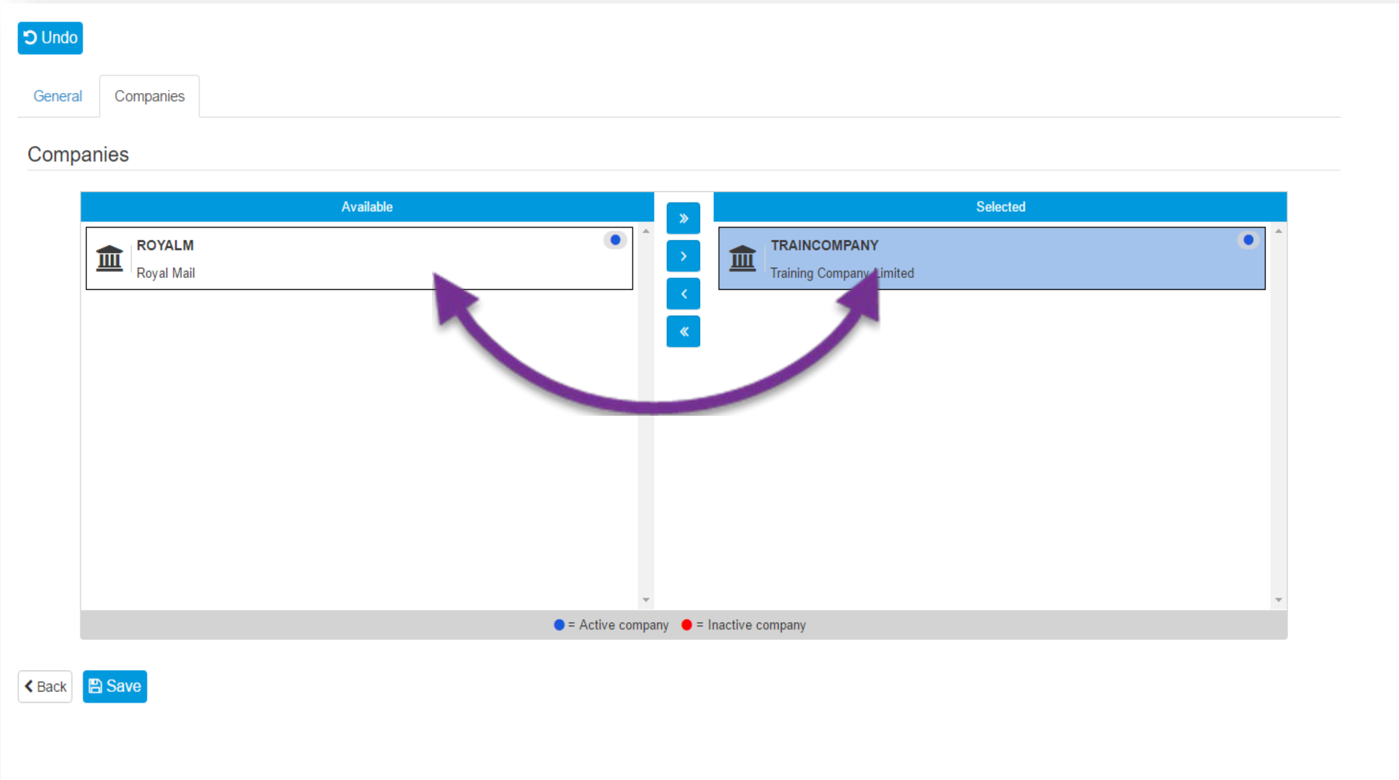



*Figure 4.1.3*

# 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.

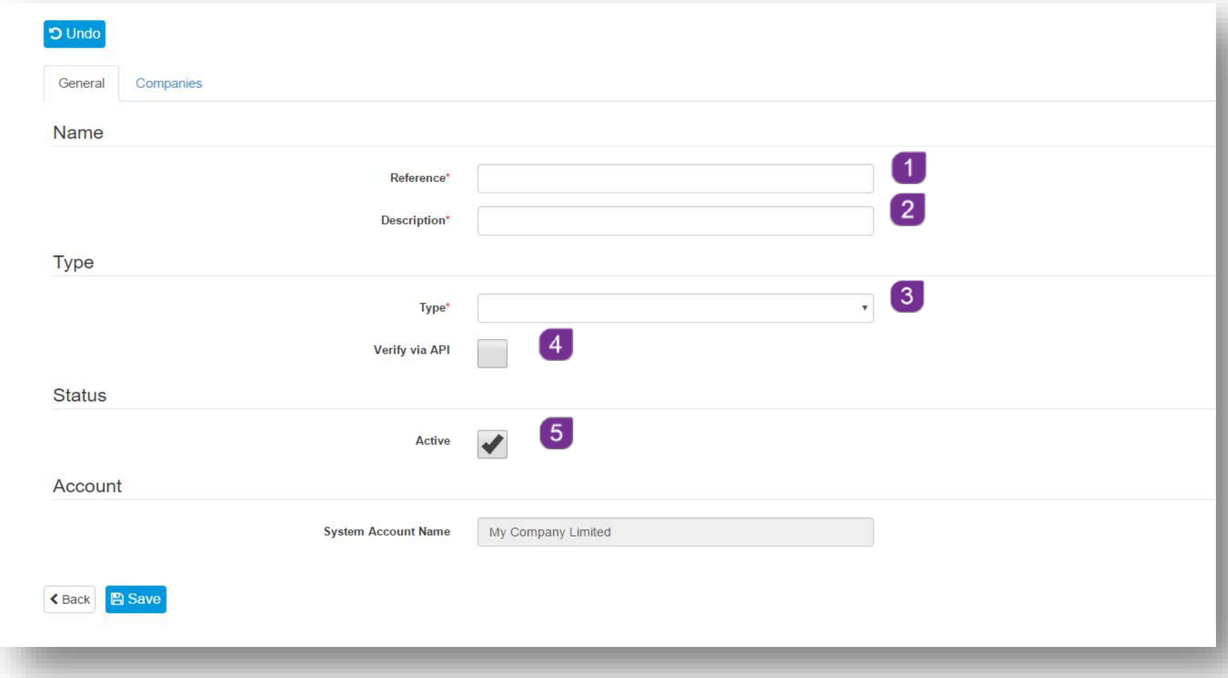



*Figure 5.1.1*

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 Onboardee 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**

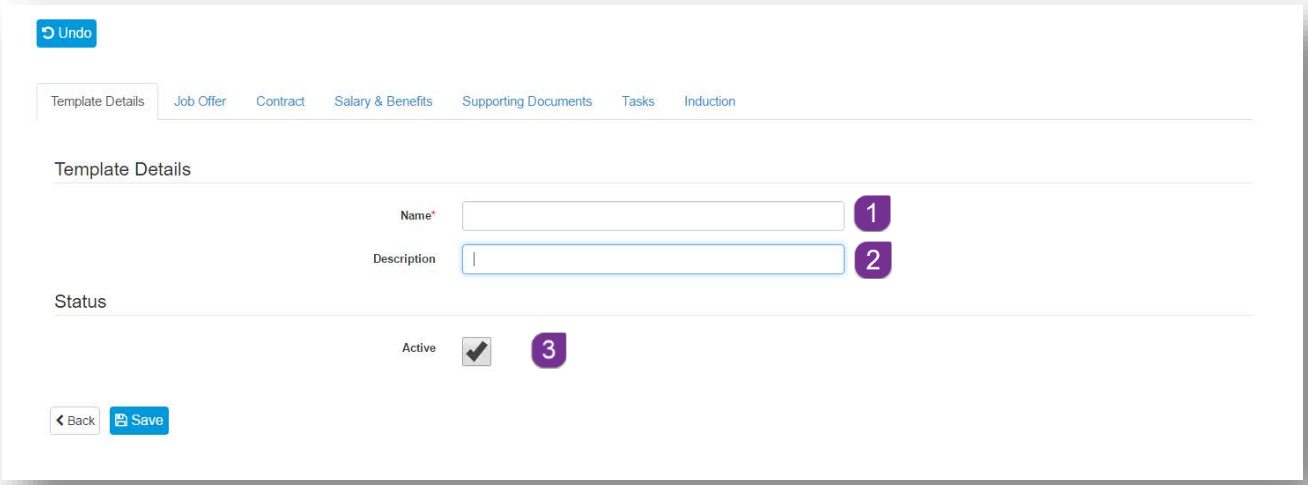



*Figure 6.1.1.1*

## 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

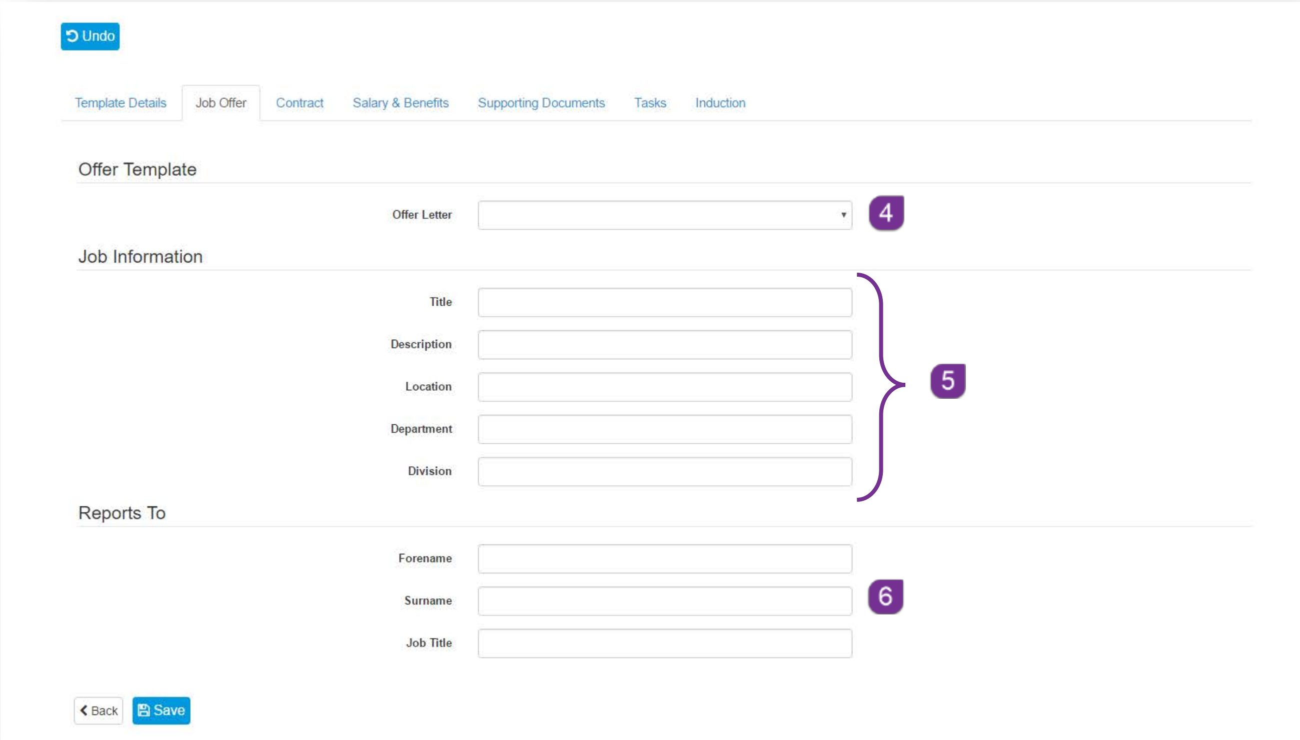



*Figure 6.1.2.1*

## 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

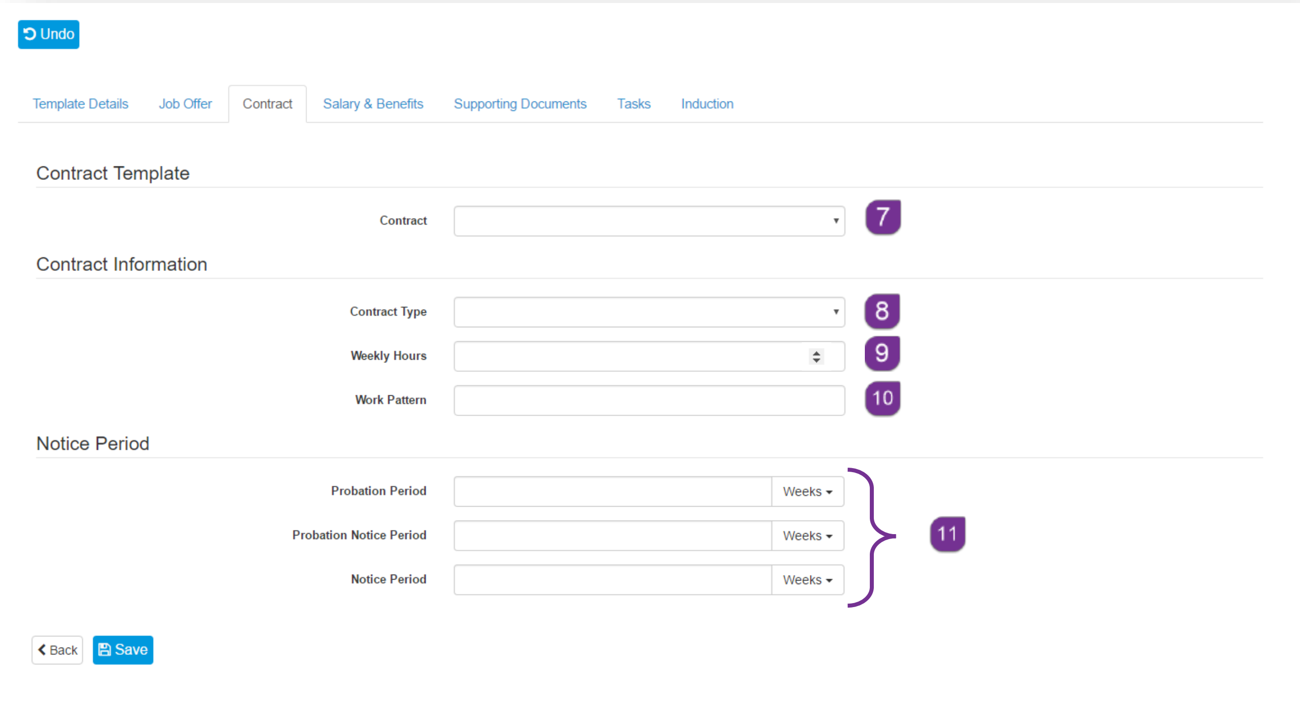



*Figure 6.1.3.1*

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

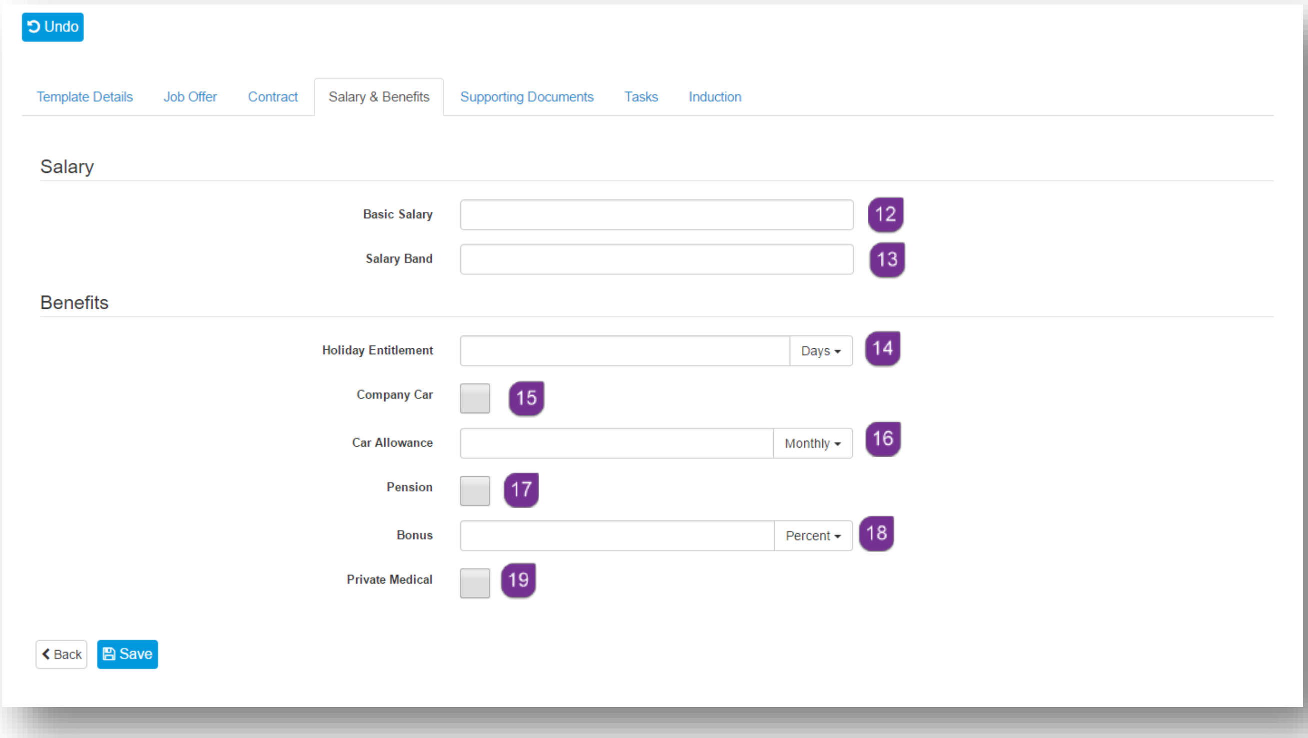



*Figure 6.1.4.1*

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**

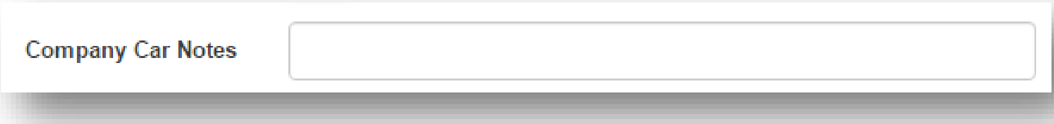



*Figure 6.1.4.2*

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**

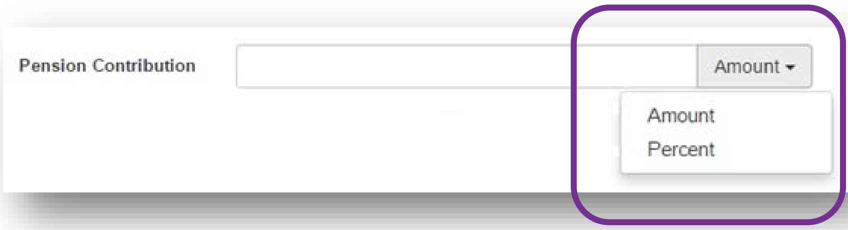



*Figure 6.1.4.3*

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**

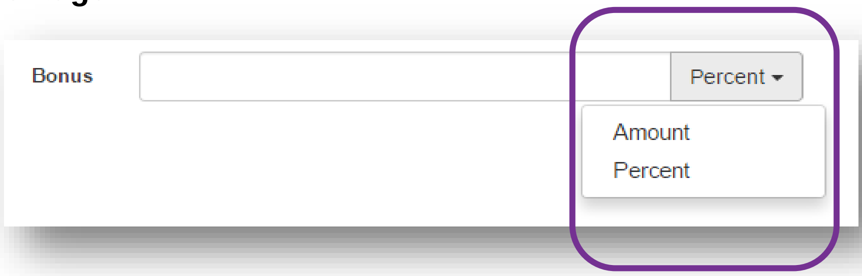



*Figure 6.1.4.4*

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

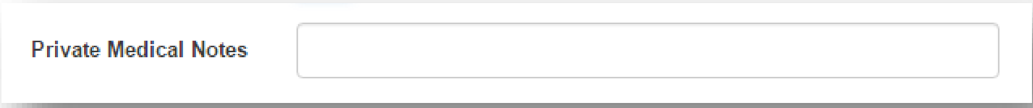



*Figure 6.1.4.5*

### 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

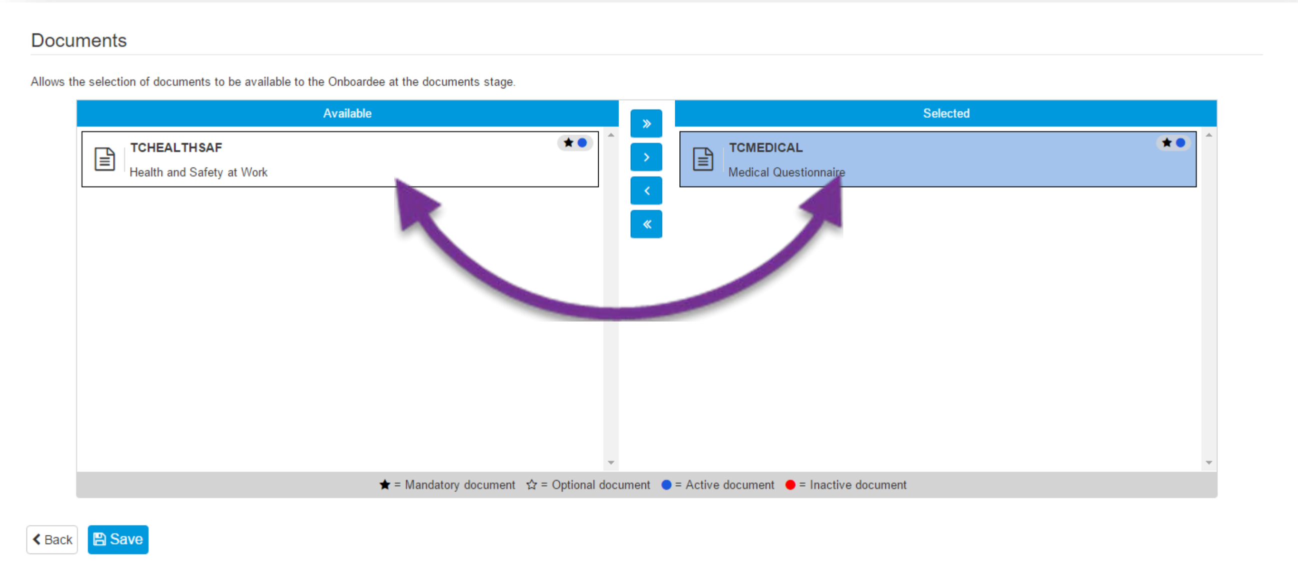



*Figure 6.1.5.1*

### 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

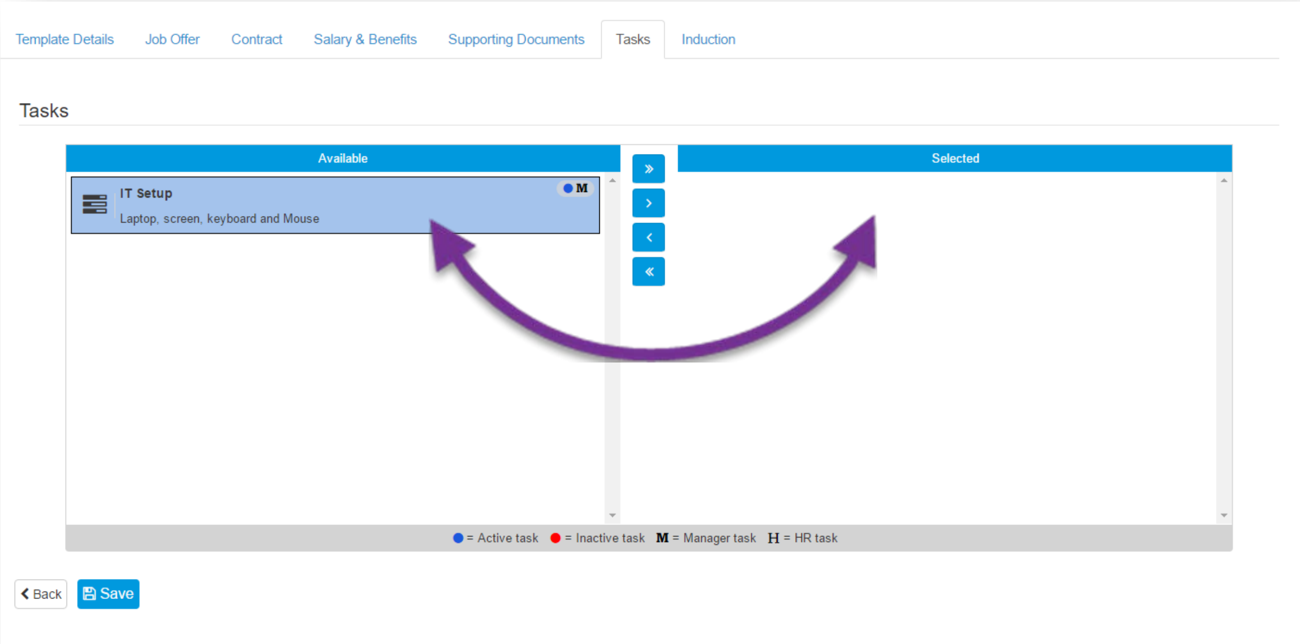



*Figure 6.1.6.1*

### 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

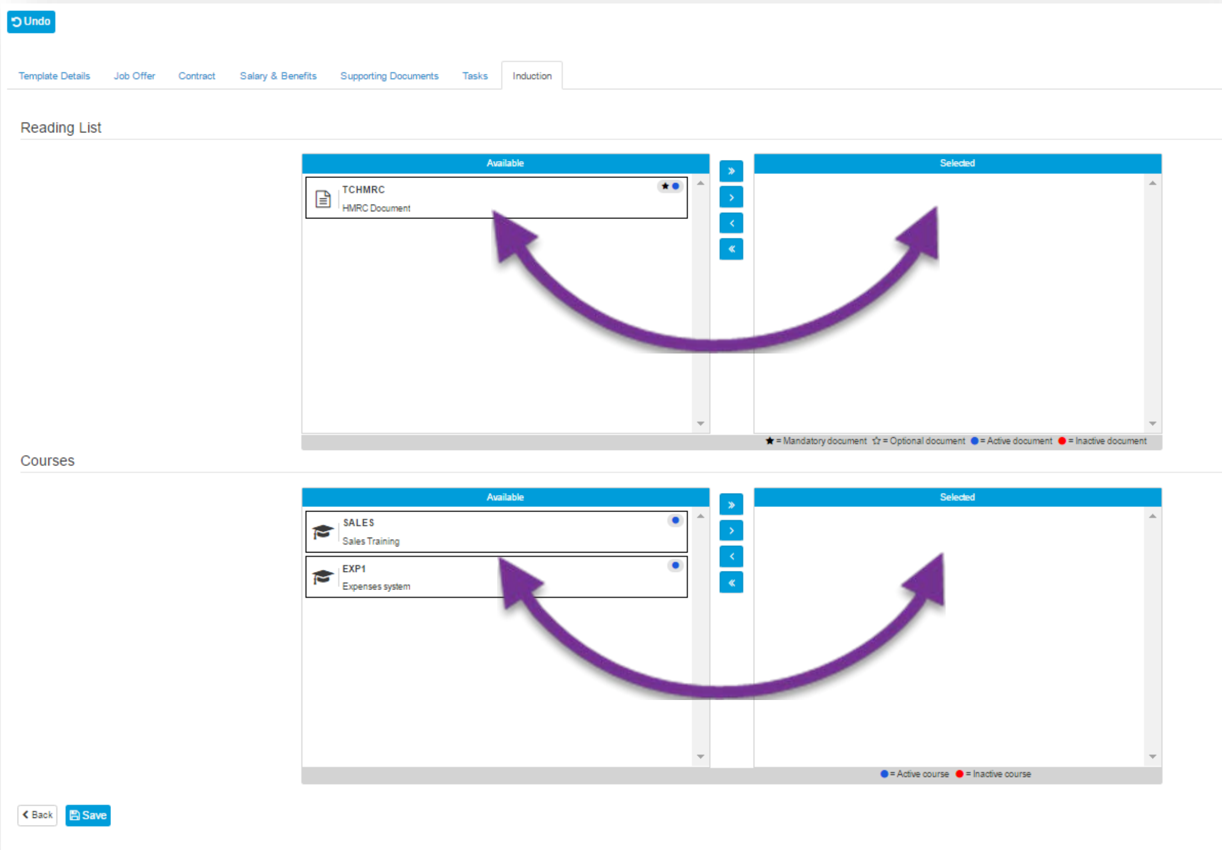



*Figure 6.1.7.1*

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

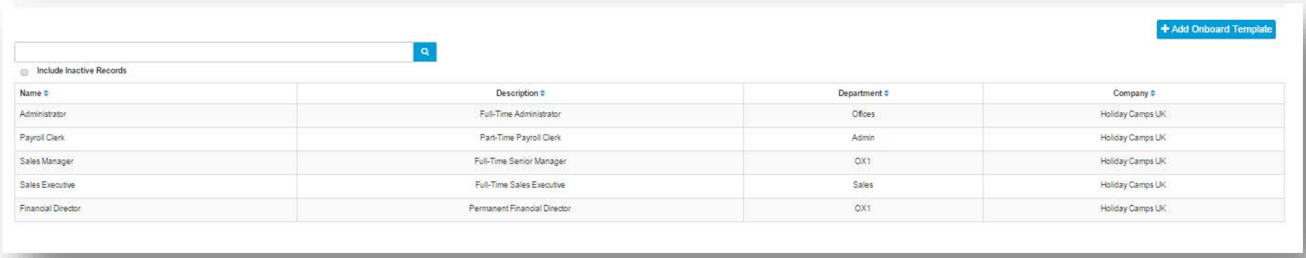



*Figure 6.1.7.2*

# 7.0 Onboardees

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

## 7.1 How to Create an Onboardee Record using an Existing Onboard Template

1 From the **Dashboard** or **Menu**, navigate to **Onboardees**

2 Click, + Add Onboardee button

3 Select the **Onboard Template,** that is relevant to the role, from the drop down list and click **OK**

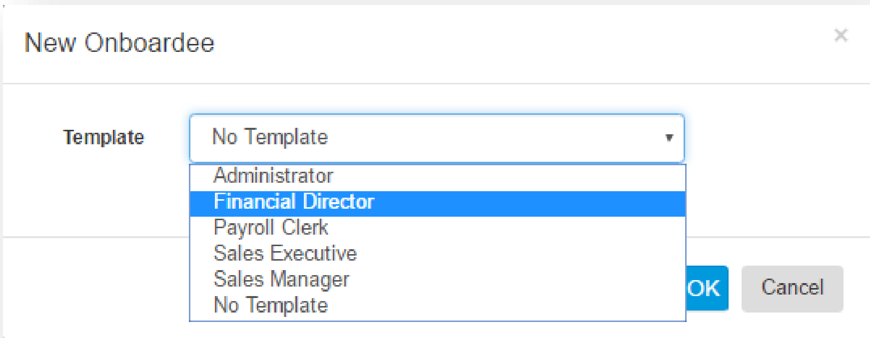



*Figure 7.1.1*

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

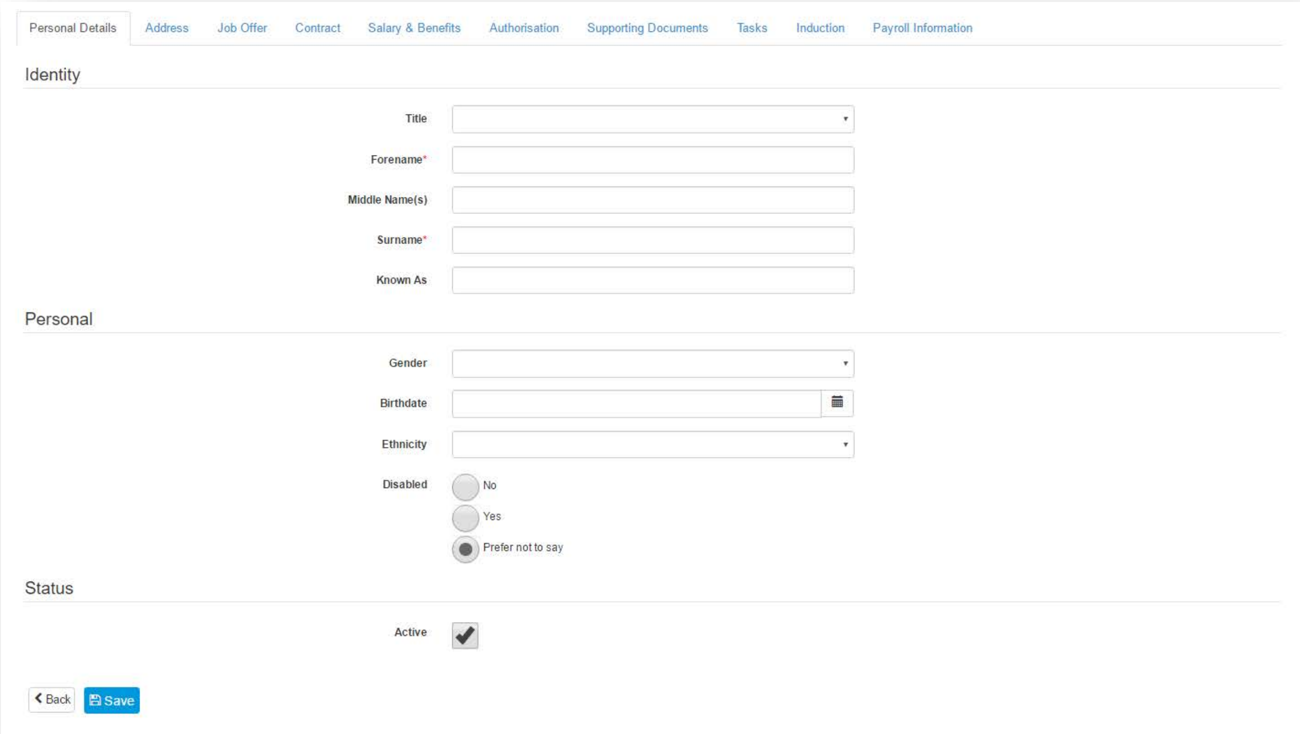



*Figure 7.1.2*

**Note**: Fields that are marked with * are mandatory and need to be completed before the record can be saved.

### 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 Onboardee to receive access to their onboard details and documentation

3 Enter the **Address** 2 details from the application form or CV

4 Enter the Onboardee's **Emergency Contact** 3 details if available (this can be left blank as the Onboardee has the opportunity to enter these details themselves once the offer letter is sent)

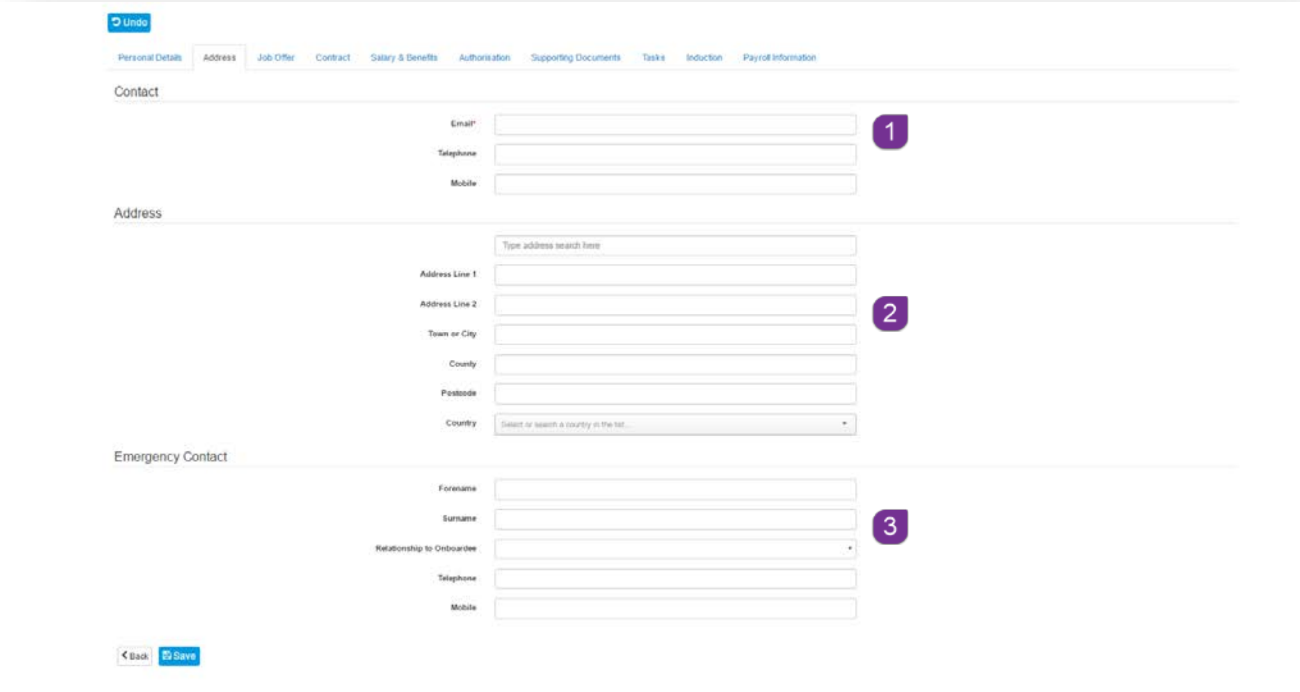



*Figure 7.1.2.1*

## 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 Onboardee on their first day

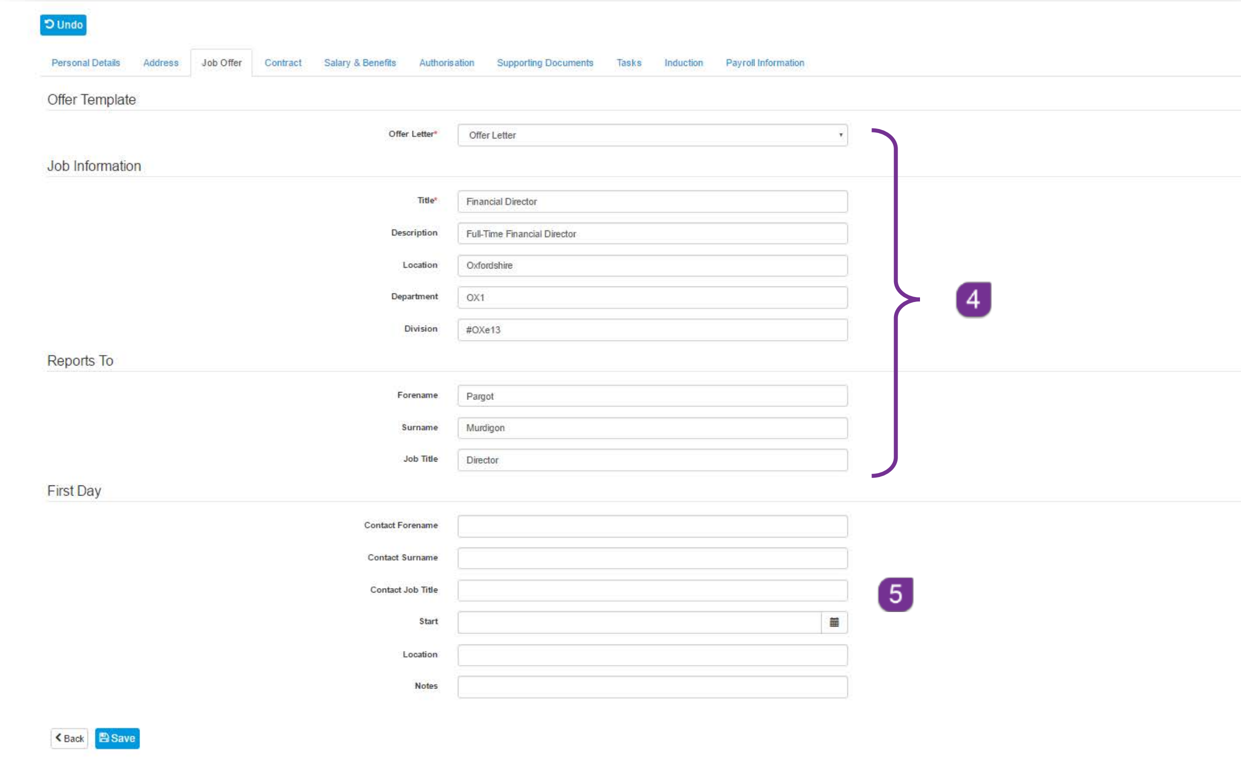



*Figure 7.1.3.1*

### 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 Onboardee's **Start date** 6
4. Enter the Onboardee's **Continuous service** 7 date if applicable

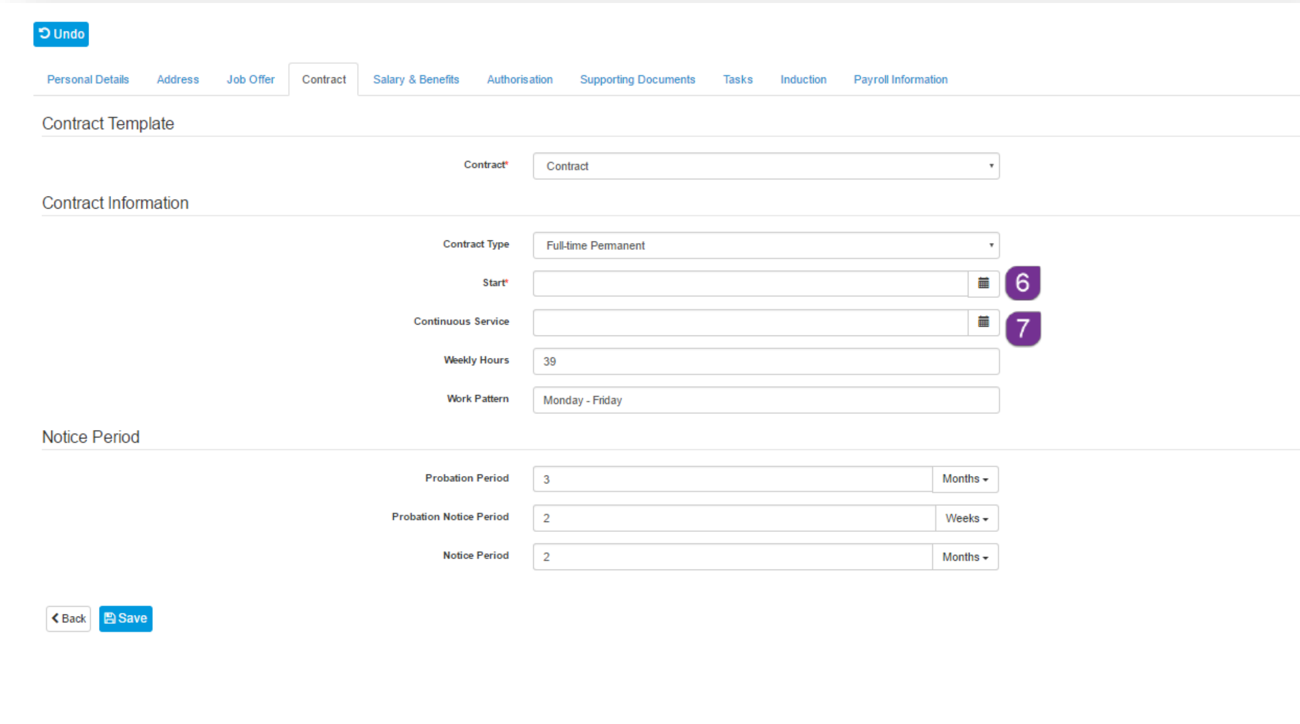



*Figure 7.1.4.1*

## 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.

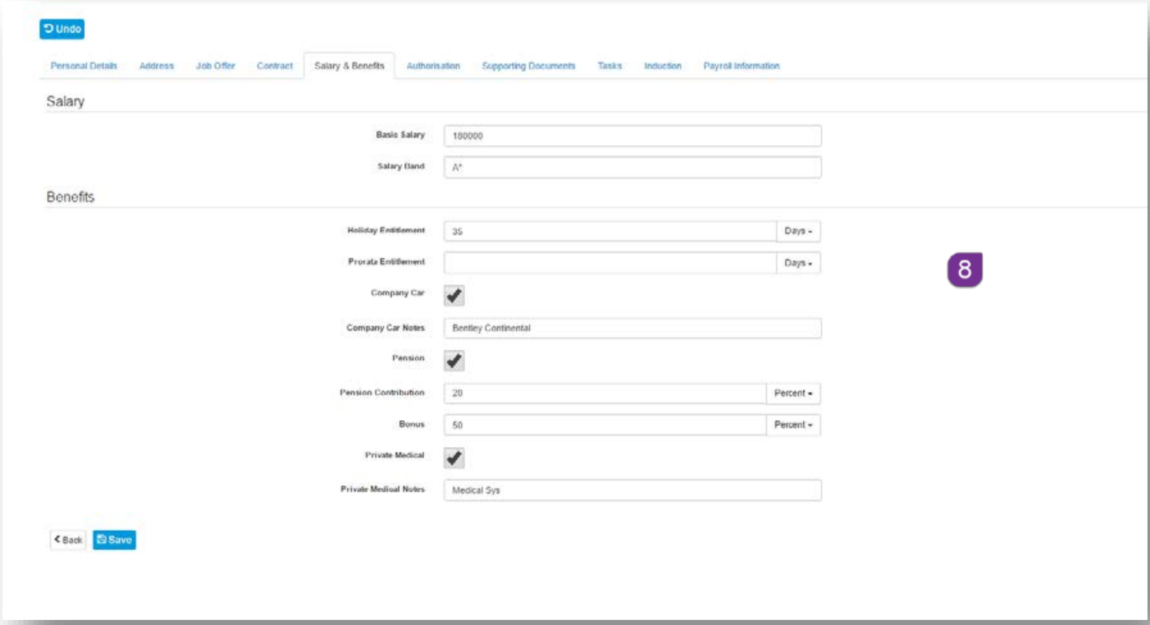



*Figure 7.1.5.1*

## 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**

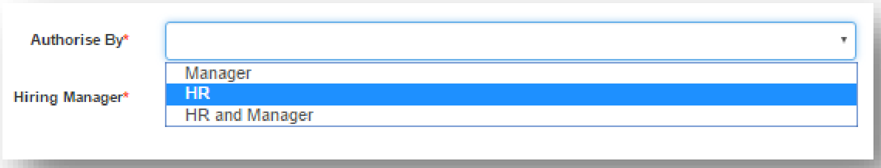



*Figure 7.1.6.1*

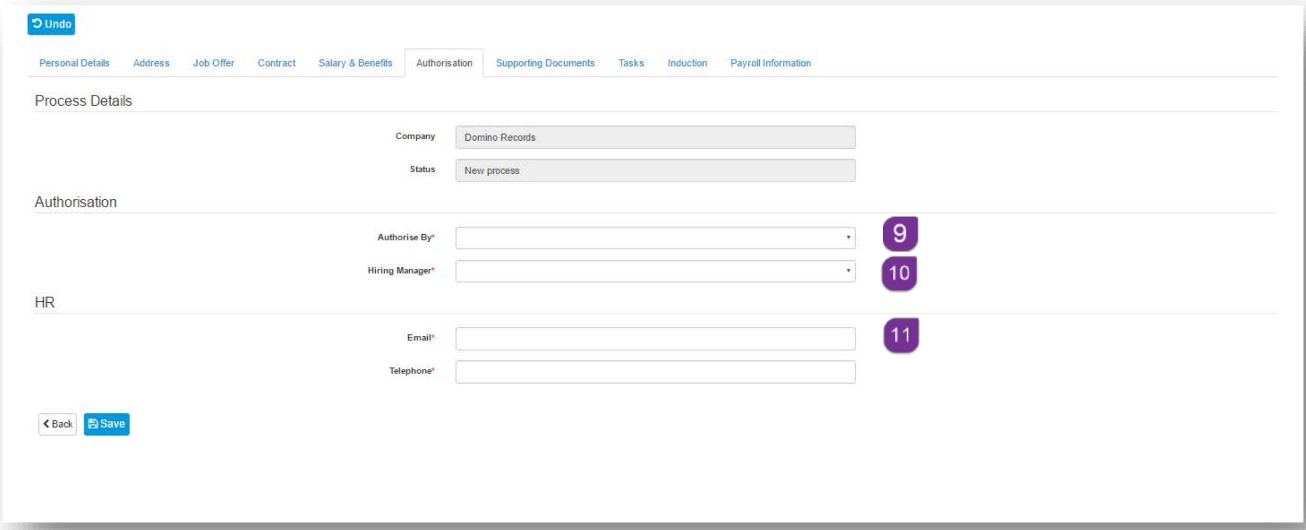



*Figure 7.1.6.2*

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

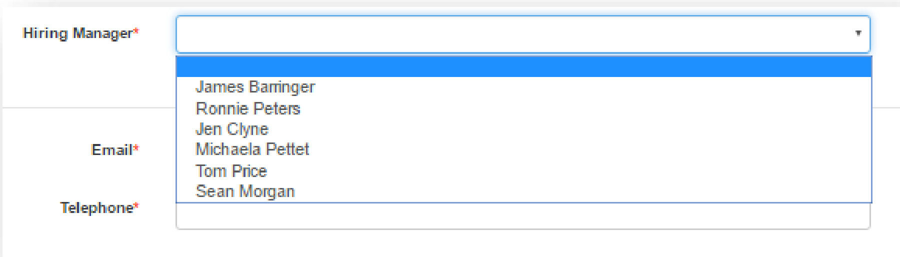



*Figure 7.1.6.3*

5 Enter the **HR Contact** 11 details so that the Onboardee 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

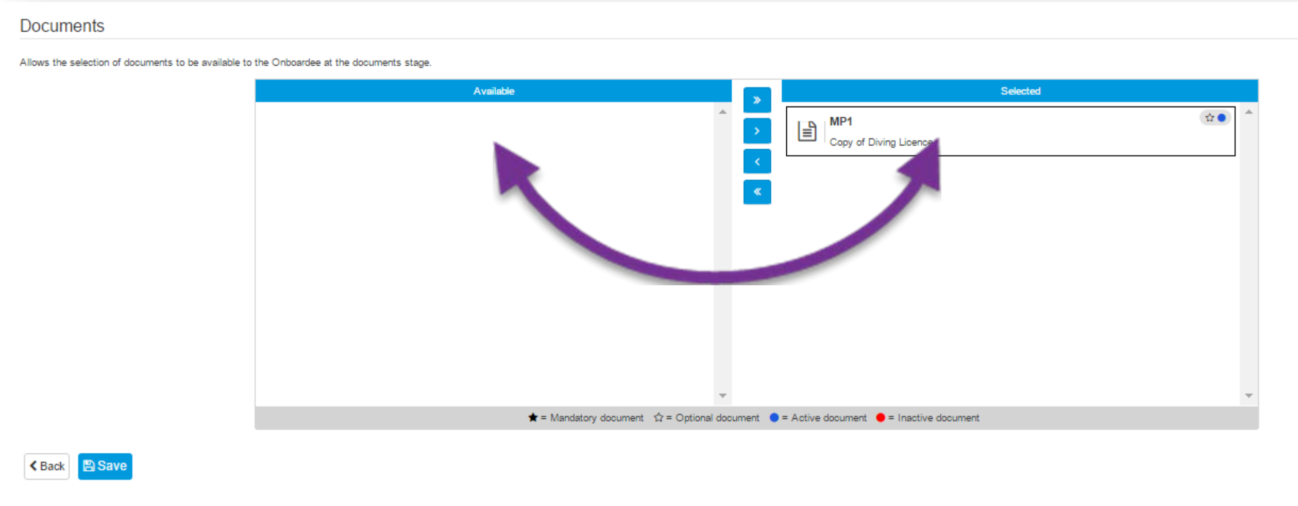



*Figure 7.1.7.1*

3 Click on › to assign a document. Alternatively, click on » to assisgn 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

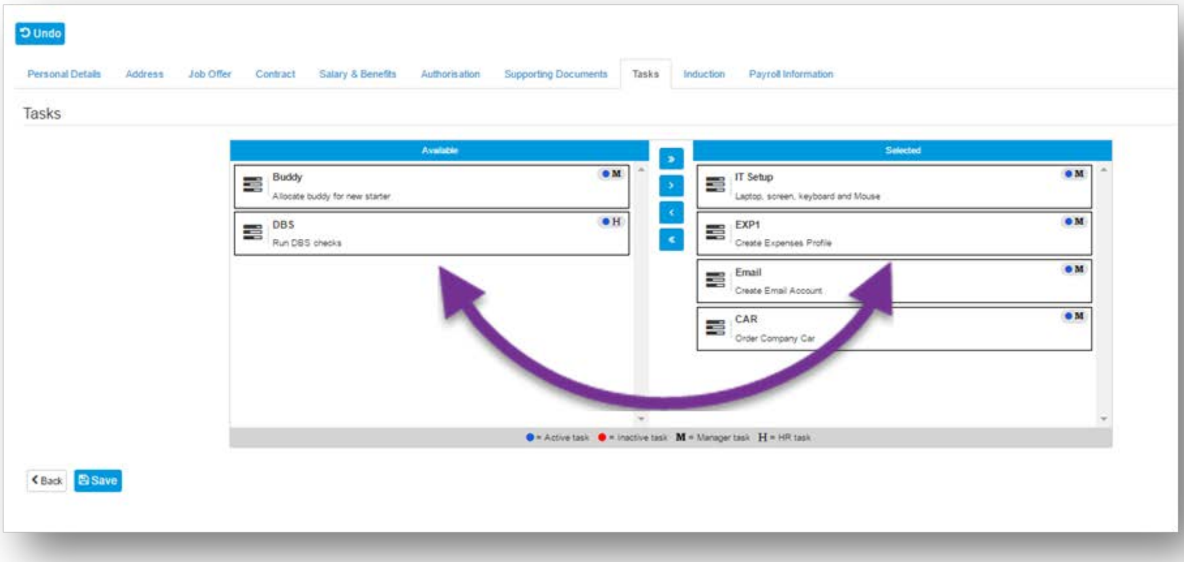



*Figure 7.1.8.1*

## 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

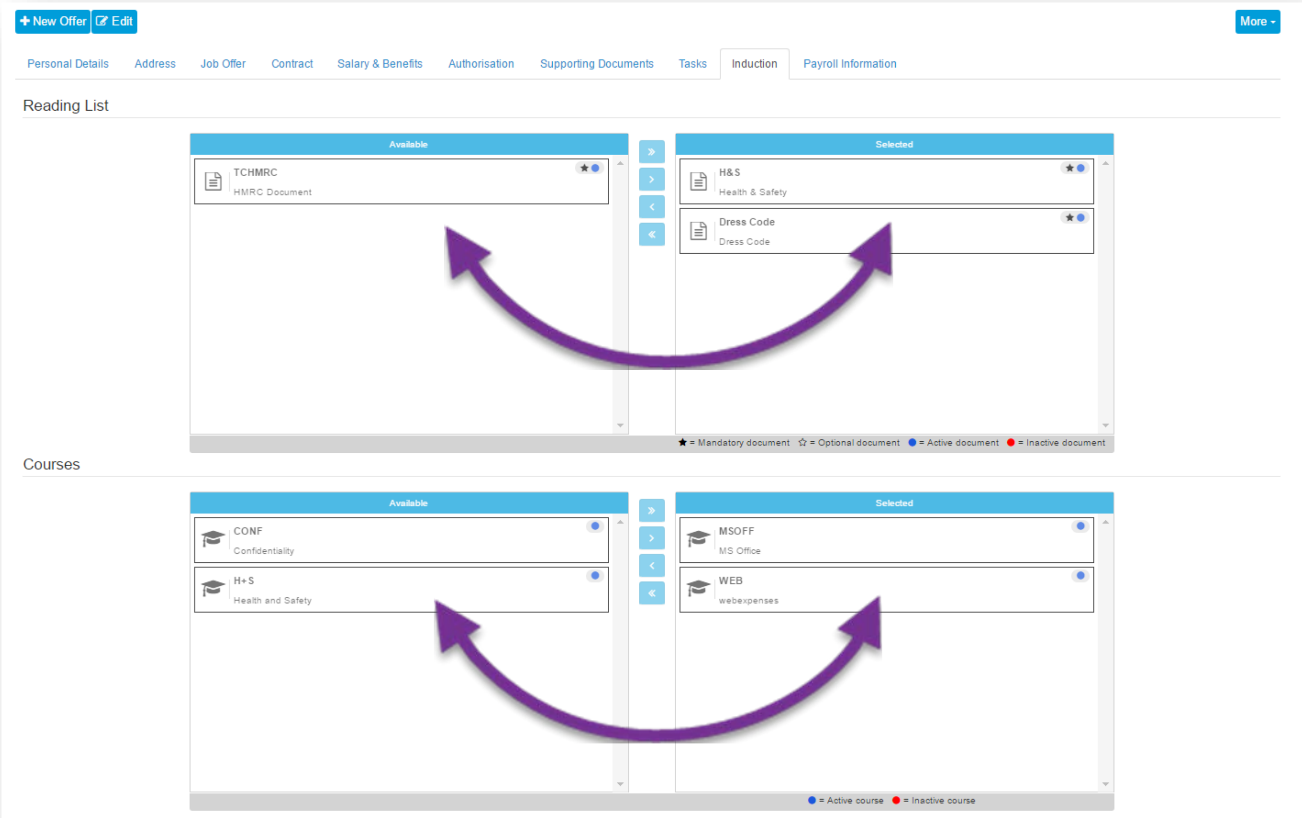



*Figure 7.1.9.1*

## 7.1.10 Payroll Information

The **Payroll Information** tab will be completed by the **Onboardee** once they have received their webonboarding access details. These are sent to the Onboardee 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.

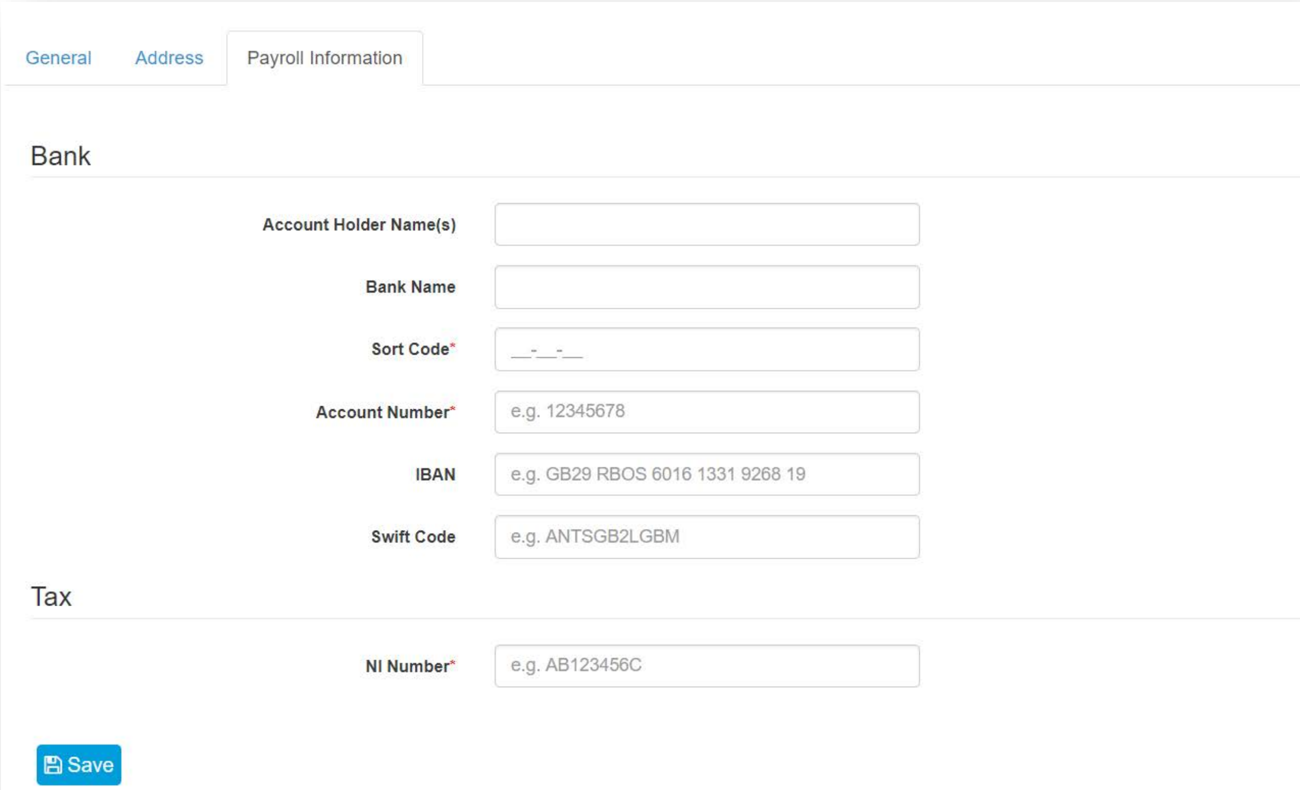



*Figure 7.1.10.1*

# 8.0 Sending the Offer and Contract of Employment

Once the Onboardee 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 Onboardee 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 **Onboardee**.

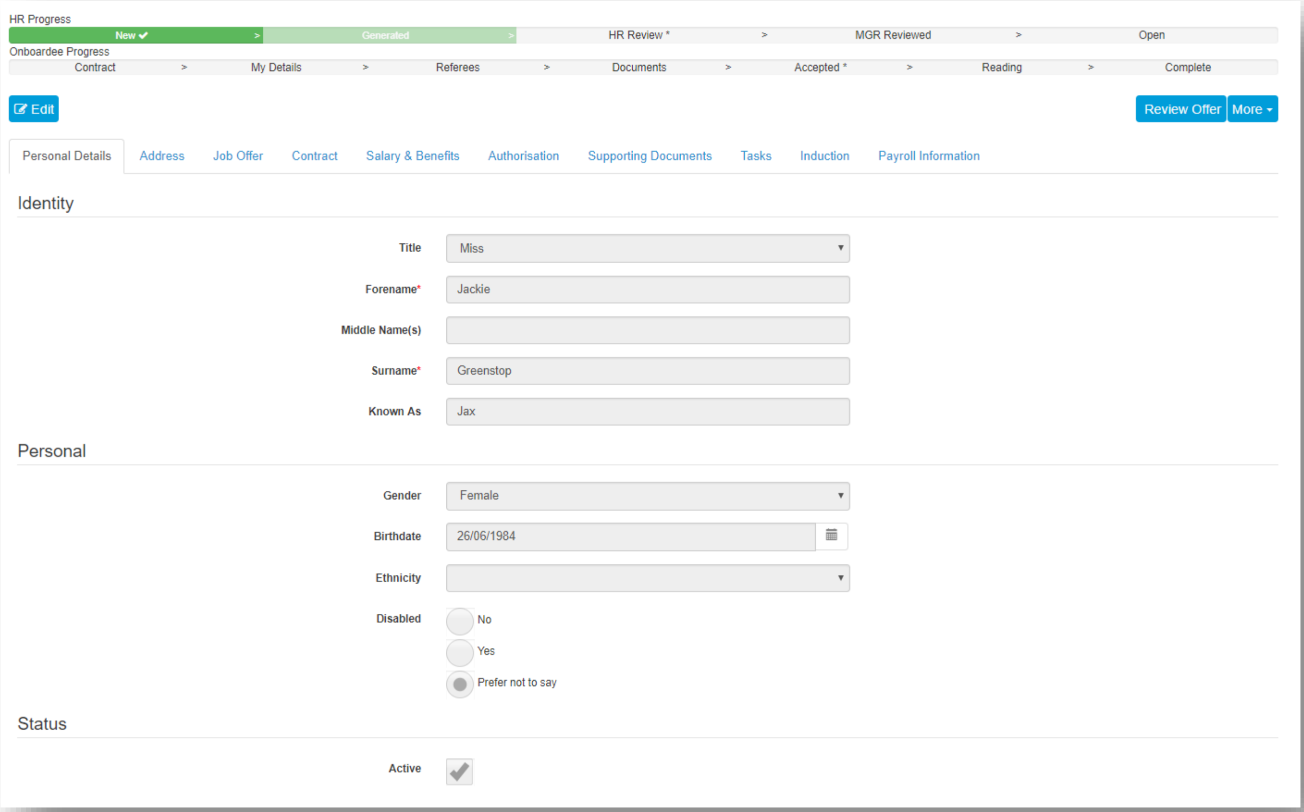



*Figure 8.0.1*

## 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**.

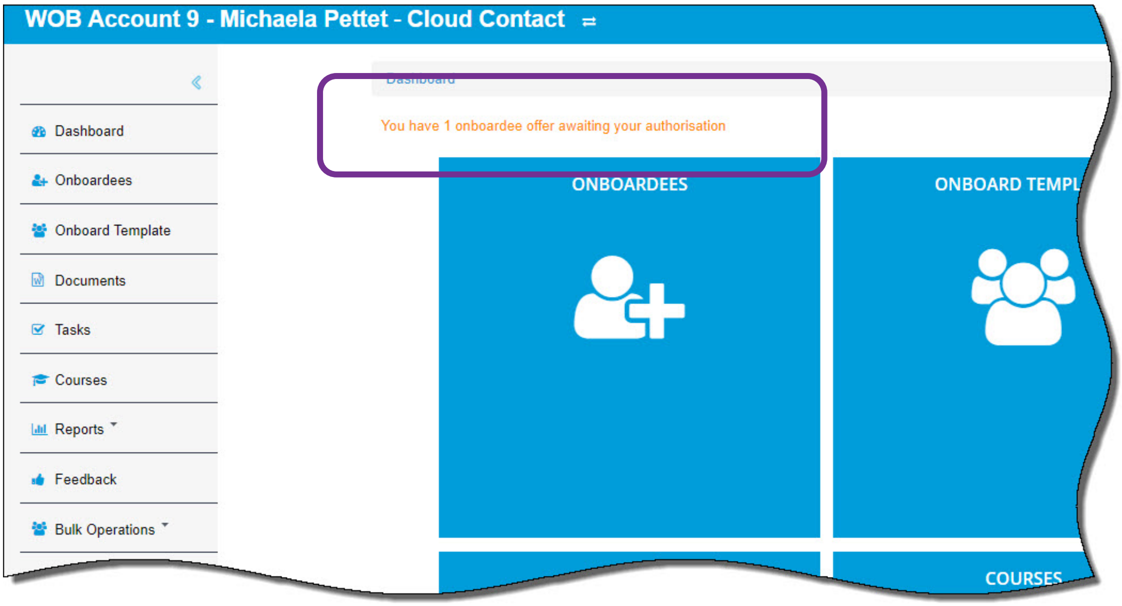
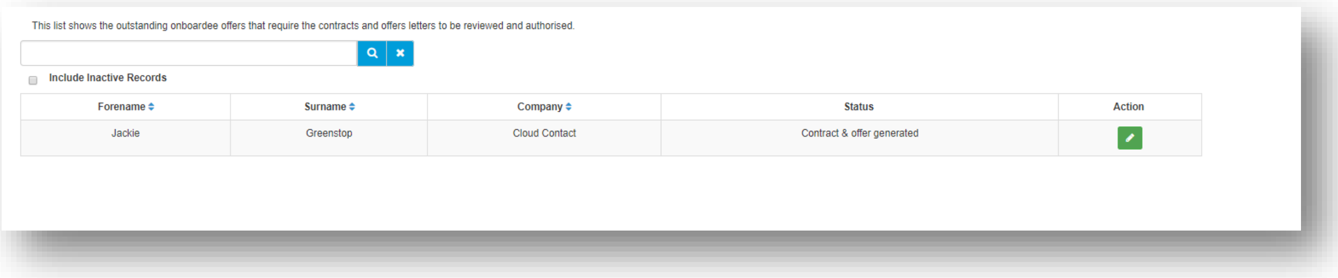



*Figure 8.1.1.1*

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**

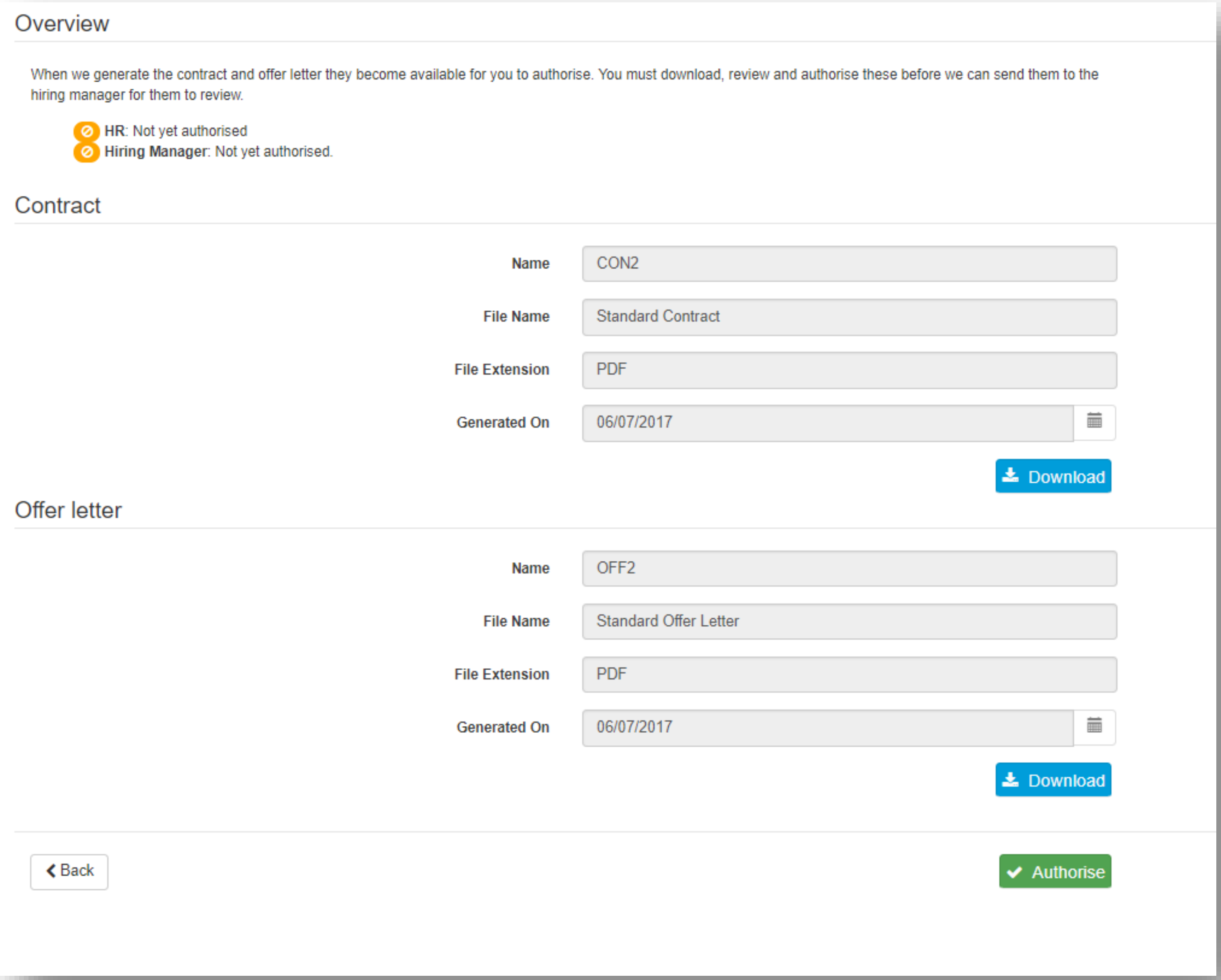



*Figure 8.1.1.4*

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

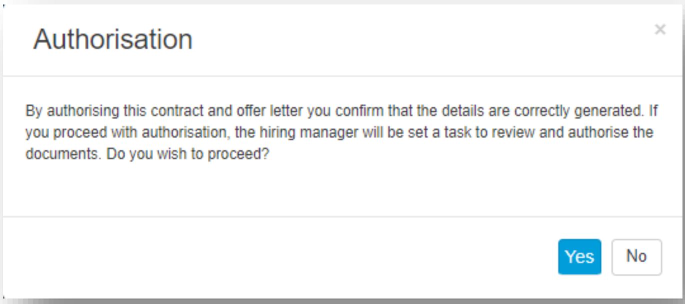



*Figure 8.1.1.5*

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.

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

Alternatively, select the **Onboardees** record and click 

, 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 yor 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 Onboardees

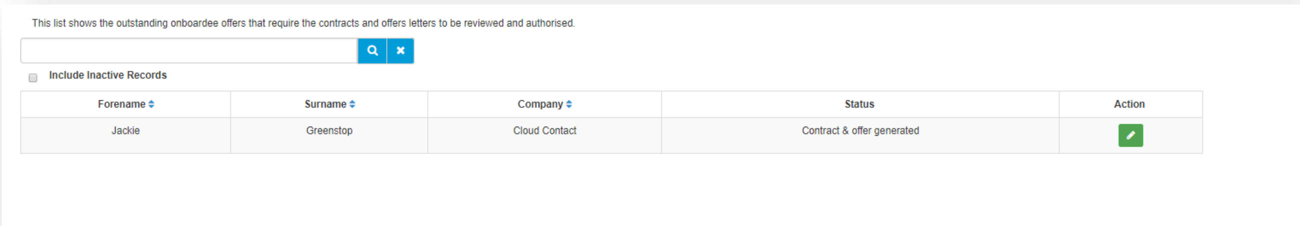



*Figure 8.1.2.2*

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

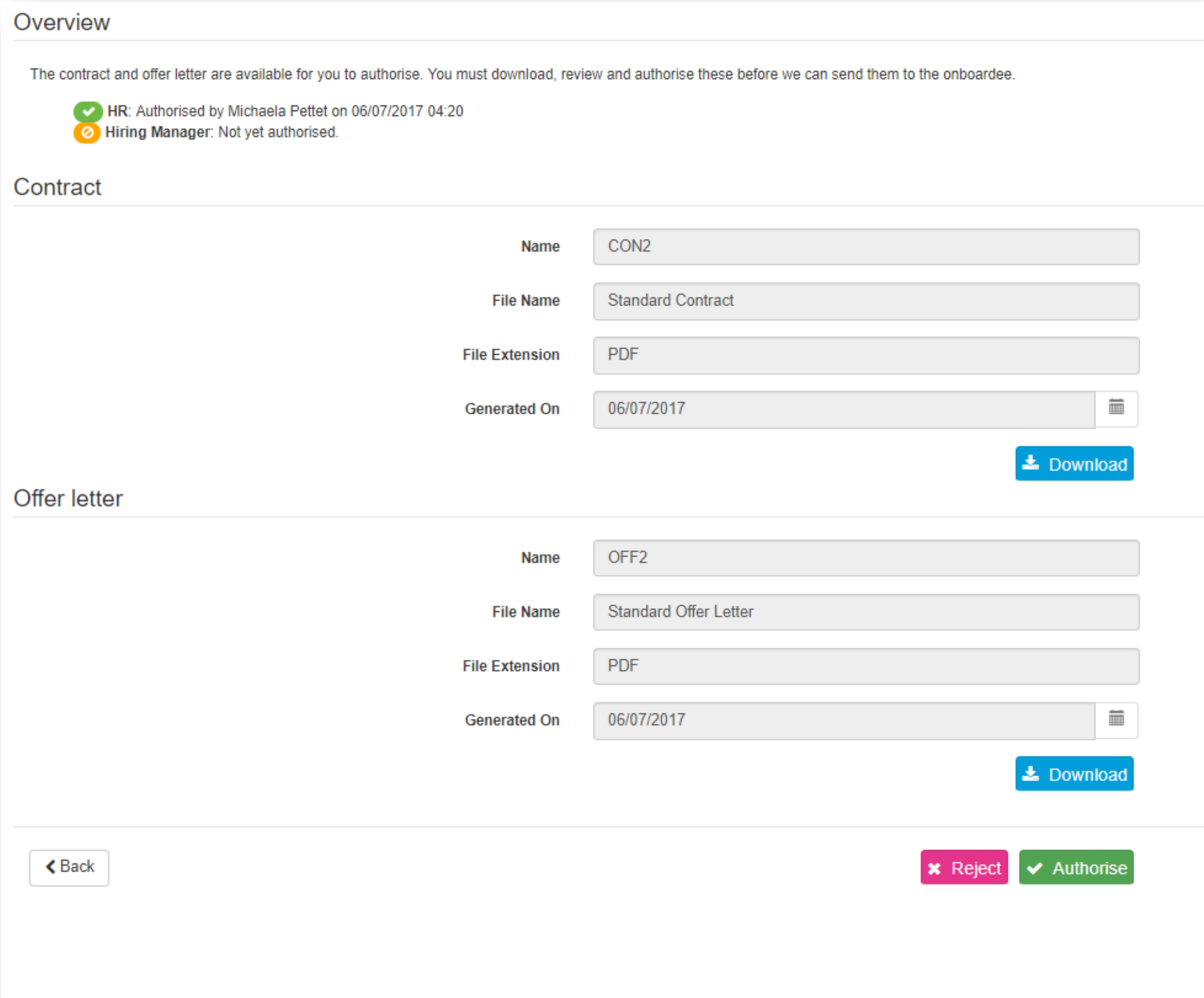
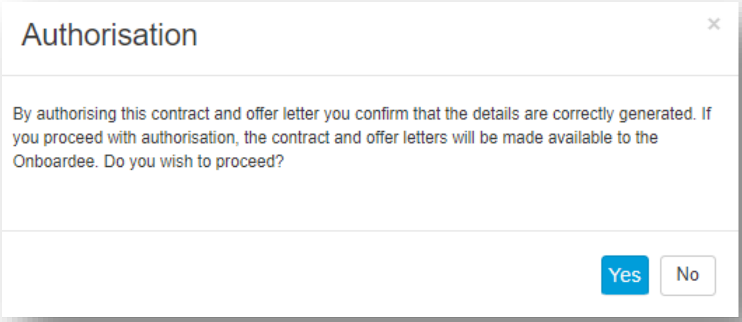



*Figure 8.1.2.3*

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




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

*Figure 8.1.2.4*

**3** To return the process to **HR** for any amendments click 


**4** Enter the reason for rejecting the **Offer Letter** and **Contract** and click **OK**

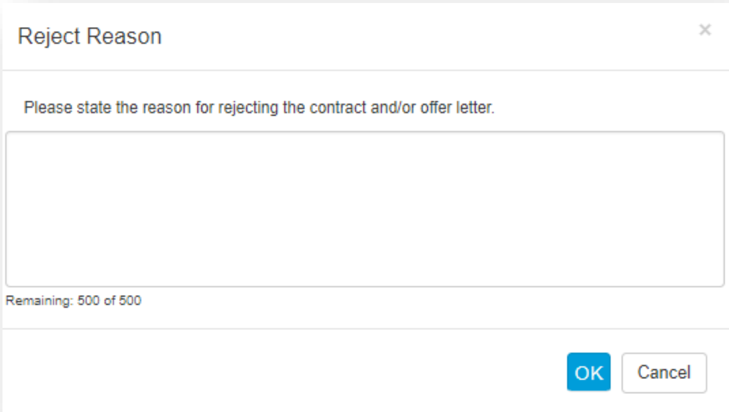



*Figure 8.1.2.5*

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

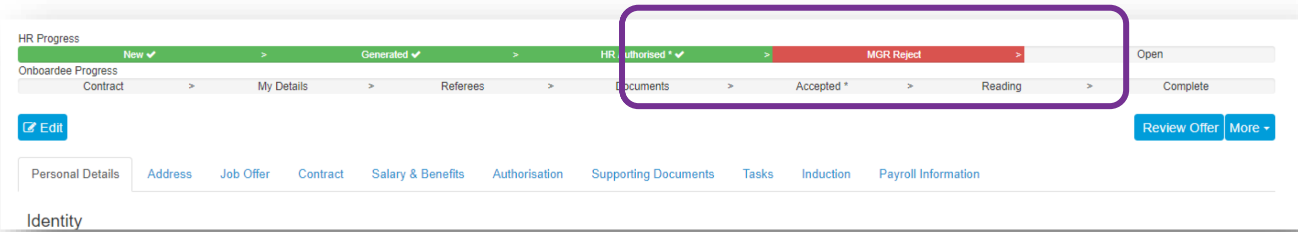



*Figure 8.1.2.6*

## 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 **Onboardee**, go to the **More** button and select **Regenerate Offer Documents**
2. A warning will appear on screen, click Yes to confirm

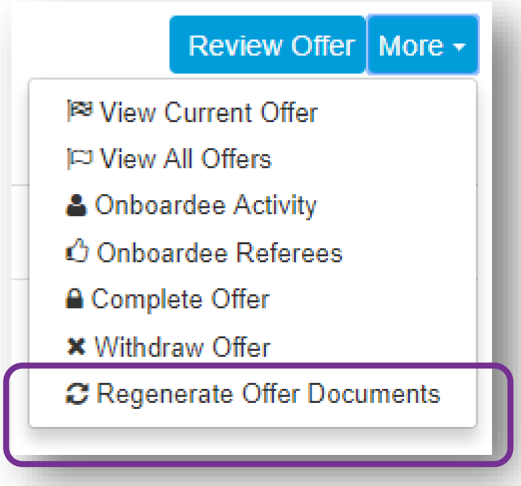



*Figure 8.2.1.*

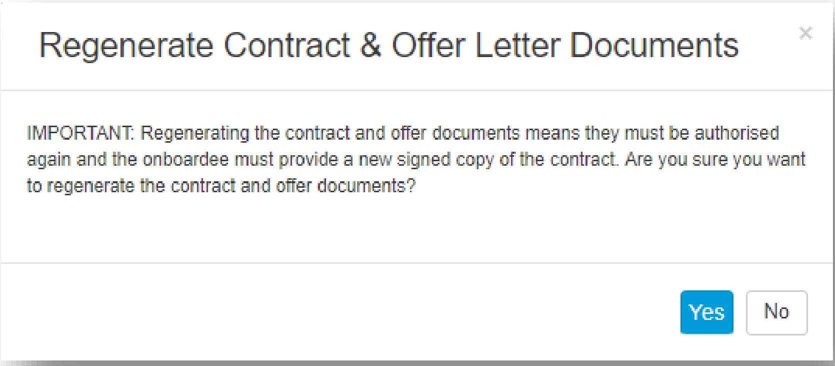



*Figure 8.2.2.*

# 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 Onboardee 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**

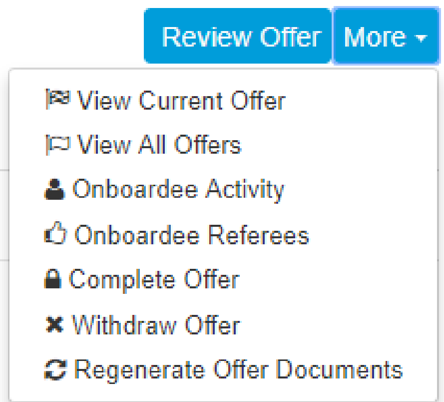



*Figure 9.0.1*

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

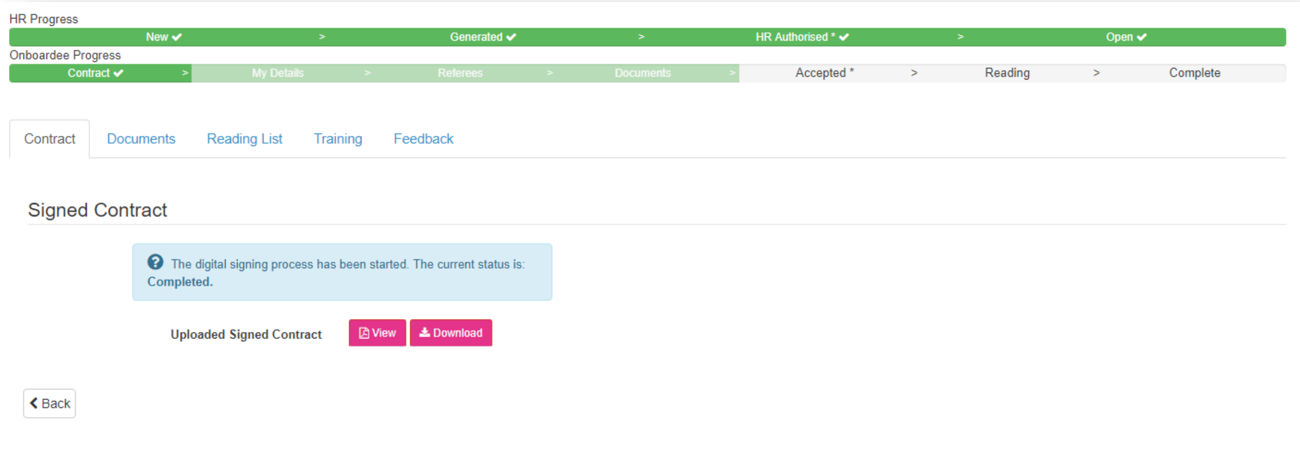



*Figure 9.0.2*

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

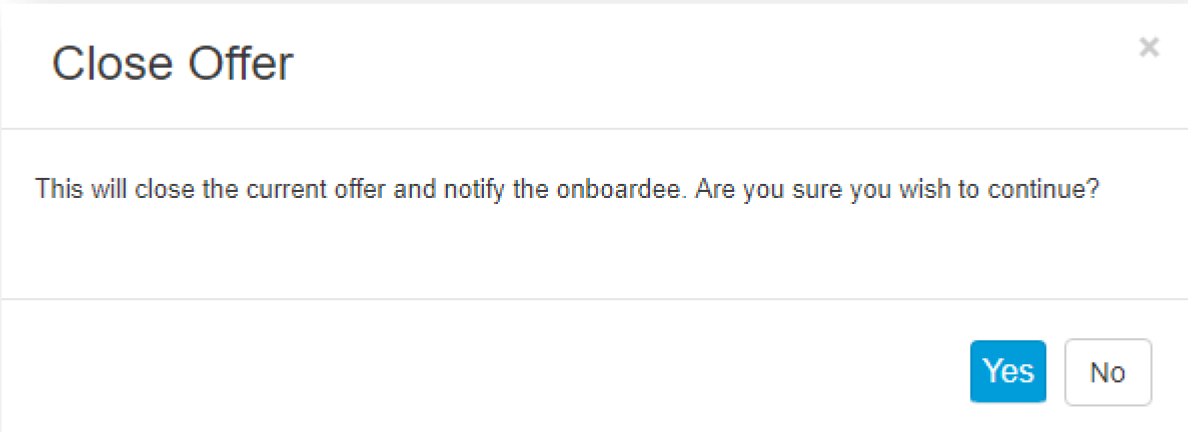



*Figure 9.0.3*

## Onboardee Portal - Open Offer

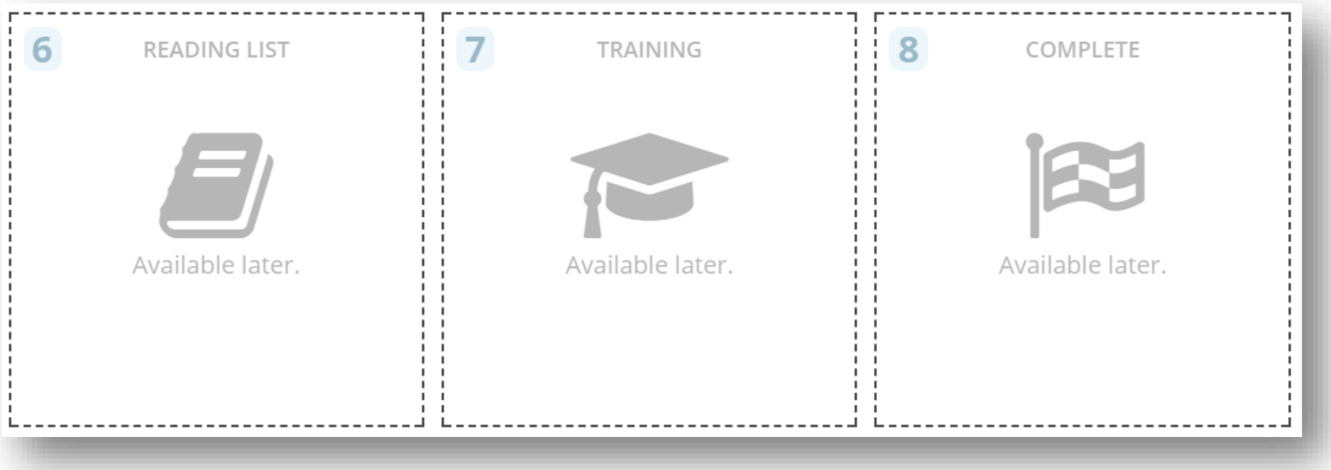



*Figure 9.0.4*

## Onboardee 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 Onboardee can still be added and the remainder of the process completed by the Onboardee.

## Withdraw Offer

- There may be instances when the offer needs to be withdrawn from the Onboardee 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

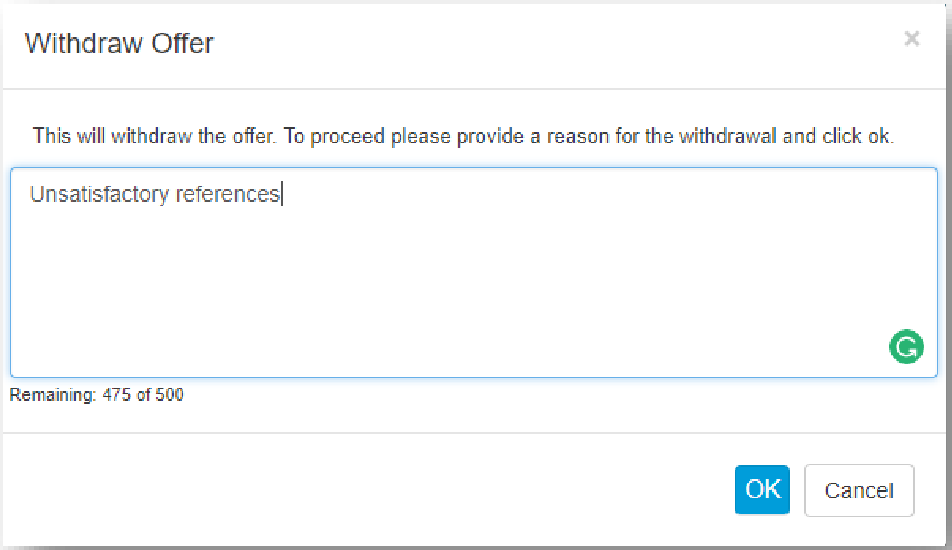



*Figure 9.0.6*

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

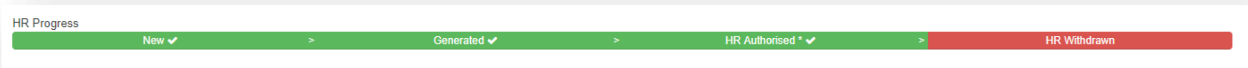



*Figure 9.0.7*

- **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 Onboardee's record, click on Regenerate Offer Documents. The screen will show you a warning message. Click **Yes** to proceed.

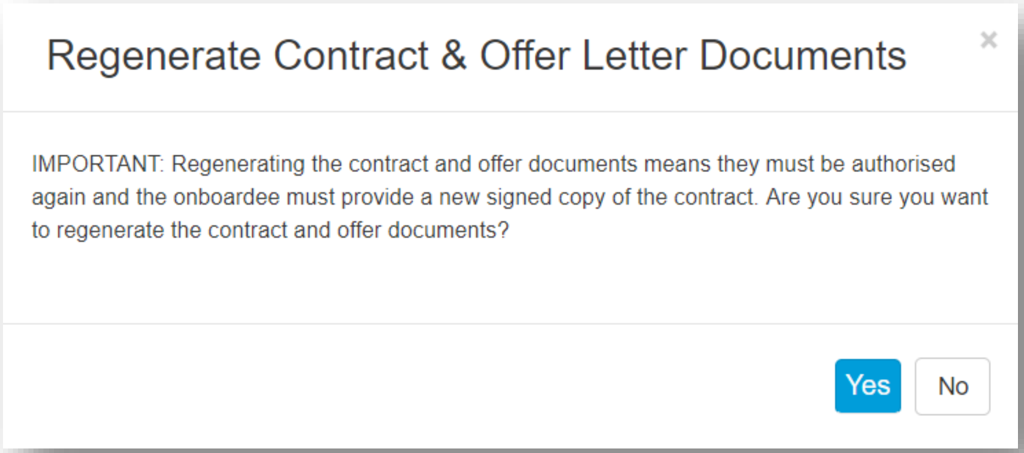



*Figure 9.0.8*

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 **Onboardee** via the Onboardee 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**

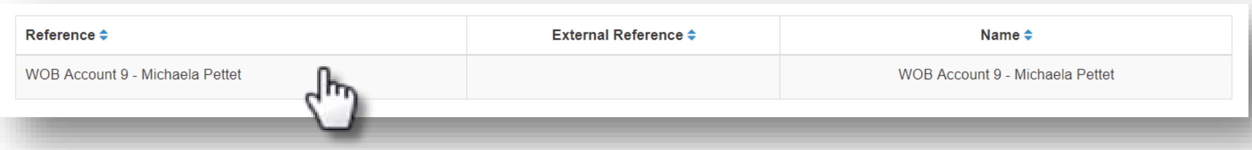



*Figure 10.1.1*

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**

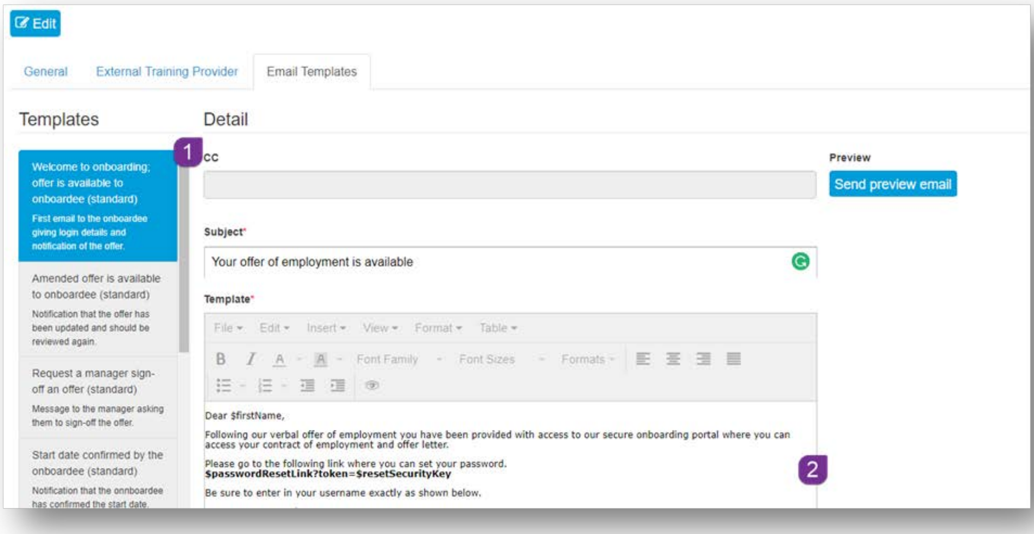



*Figure 10.1.2*

6 Select each one in turn 1 to preview the content 2

7 Select the email that you want to customise

8 Click Edit

9 The Formatting tool bar is now available to use 3

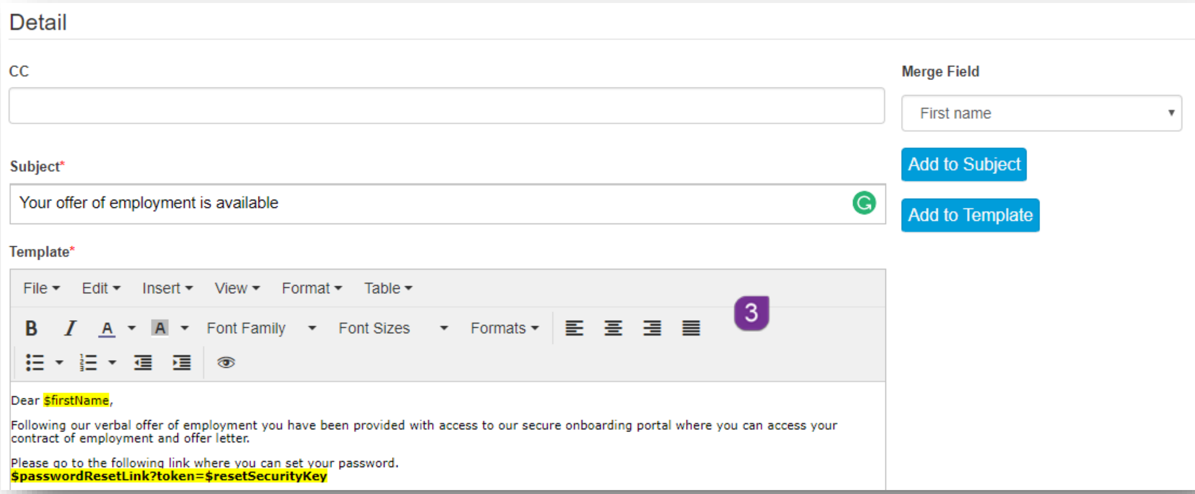



*Figure 10.1.3*

### 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

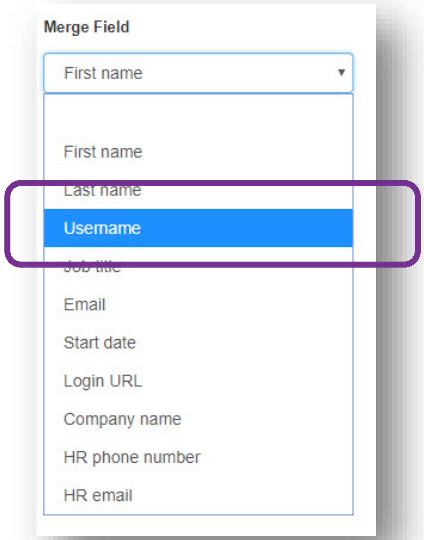



*Figure 10.1.1.1*

### 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

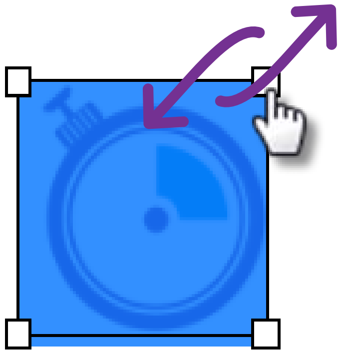


*Figure 10.1.2.1*

### 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

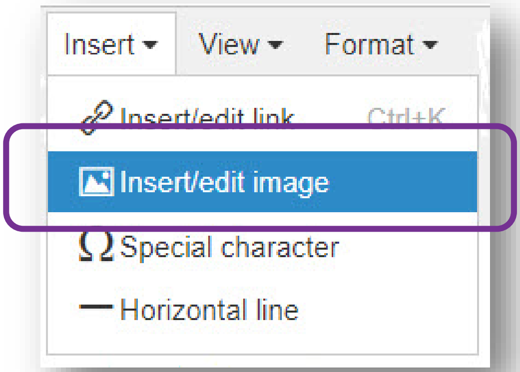



*Figure 10.1.3.1*

4 Add an **Image description** if required

5 Add the desired **Dimensions**

6 Click **OK** to save

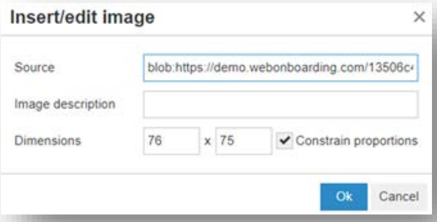



*Figure 10.1.1.4*

## Complete list of email templates

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

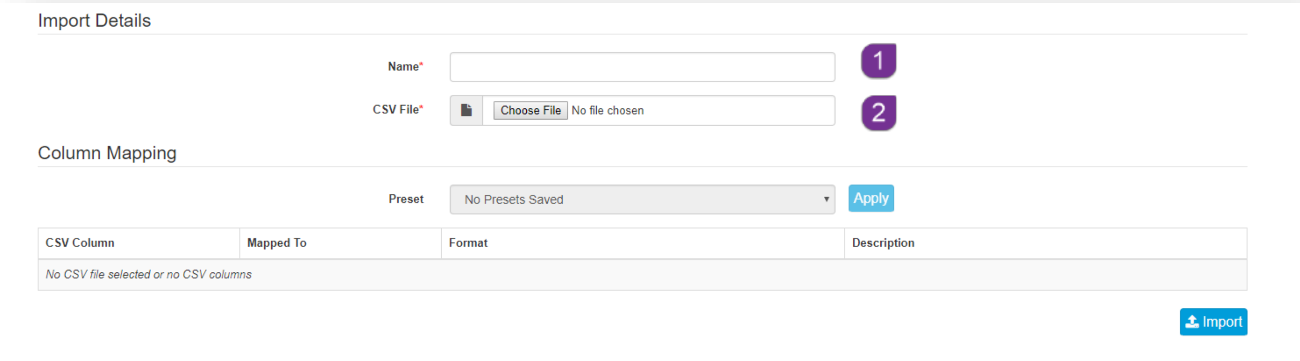



*Figure 11.1.1.1*

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)

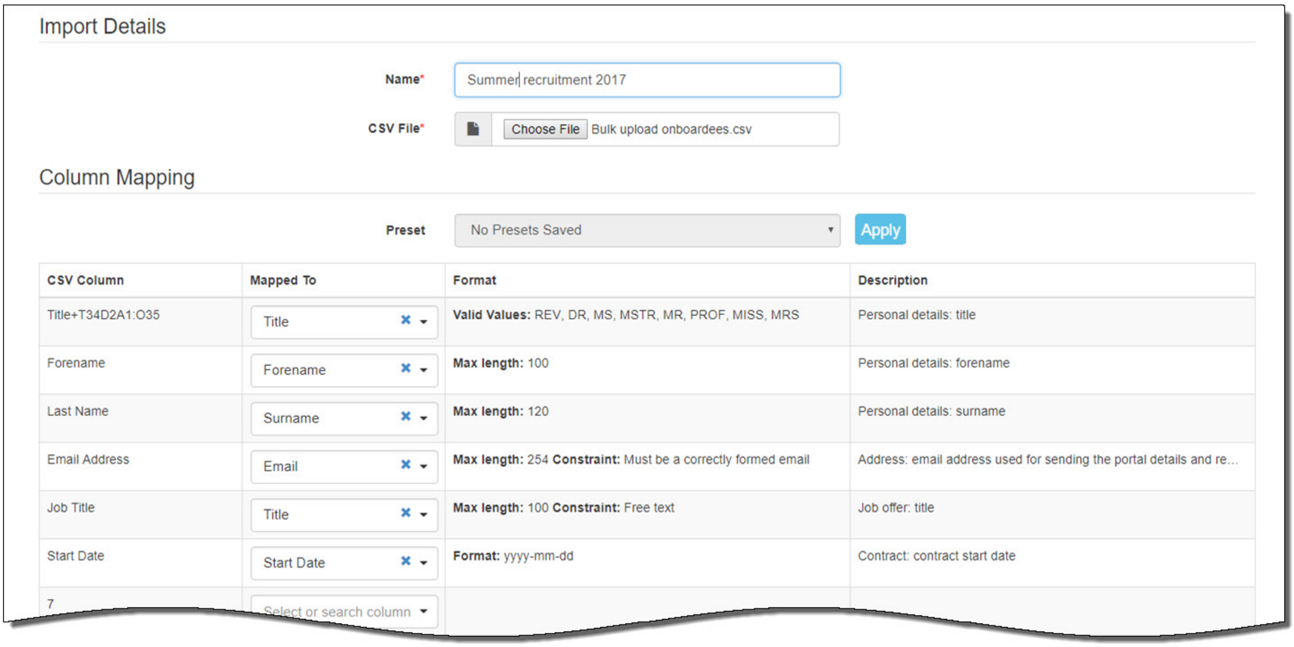



*Figure 11.1.1.2*

**9** Once the headings have been mapped to the fields, move to the bottom of the screen and click on Import

**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**

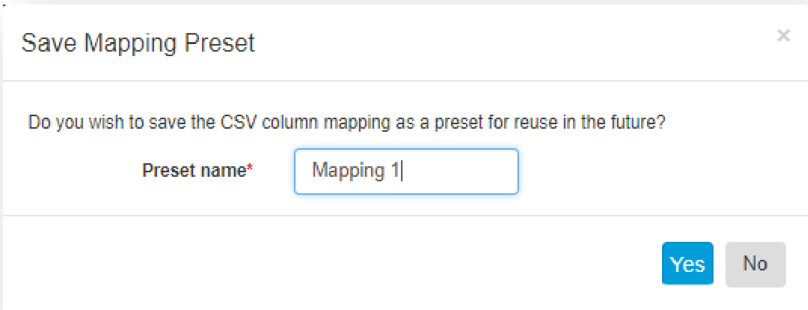



*Figure 11.1.1.3*

**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 individul record or in bulk

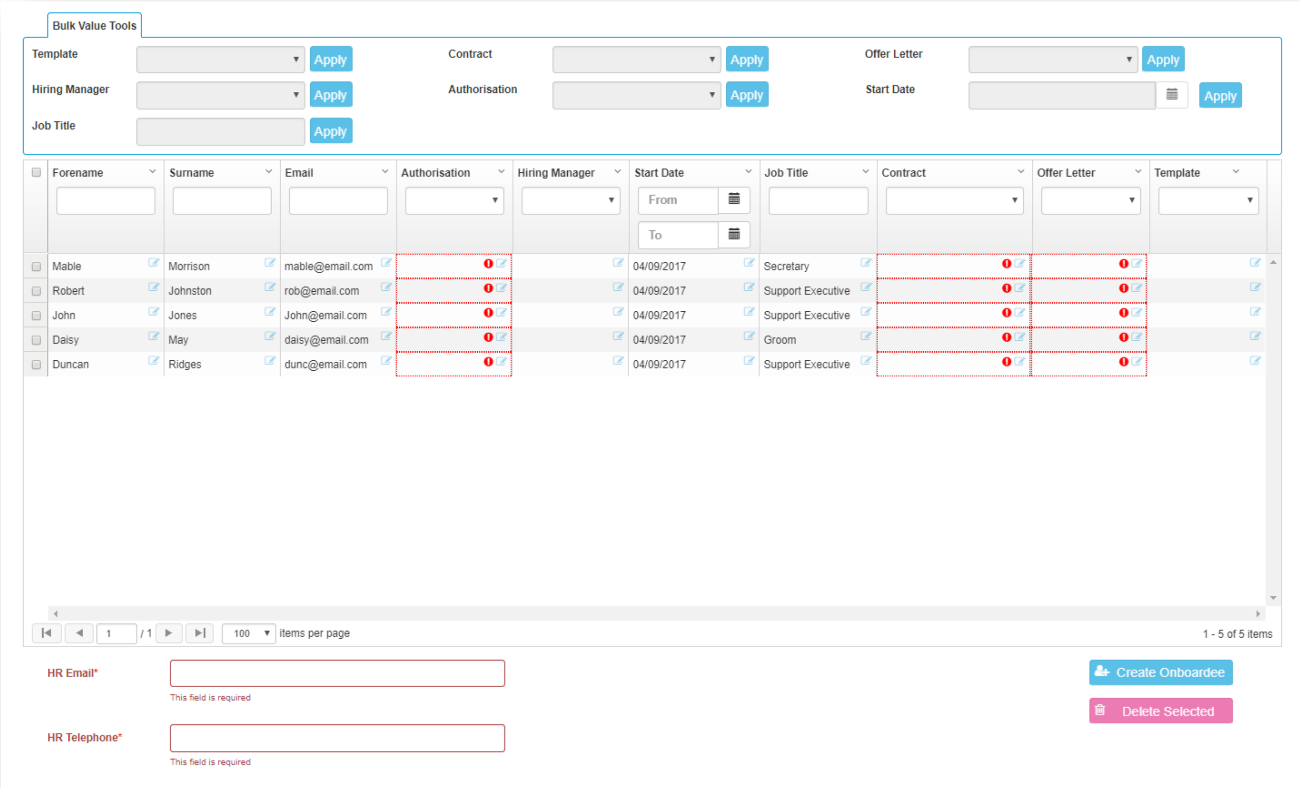
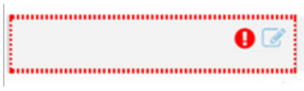



*Figure 11.1.1.4*

**Note**: Fields that are highlighted in red  are **mandatory** and will need to be completed before the Onboardee 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 Onboardee

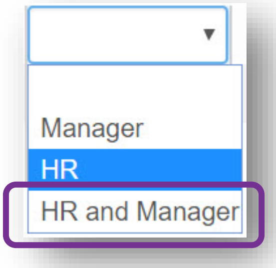



*Figure 11.1.2.1*

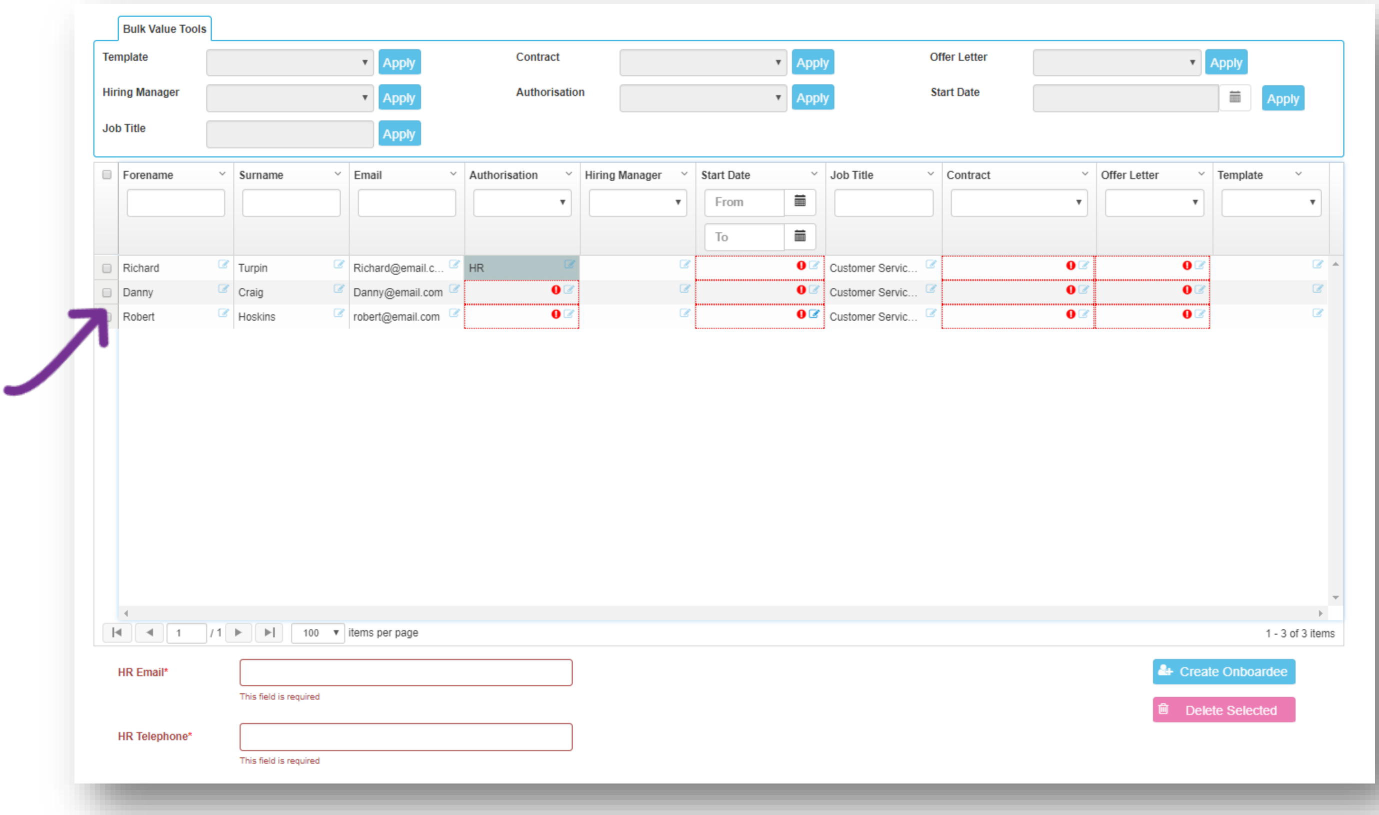



*Figure 11.1.2.2*

9. Individual records for each Onboardee 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**

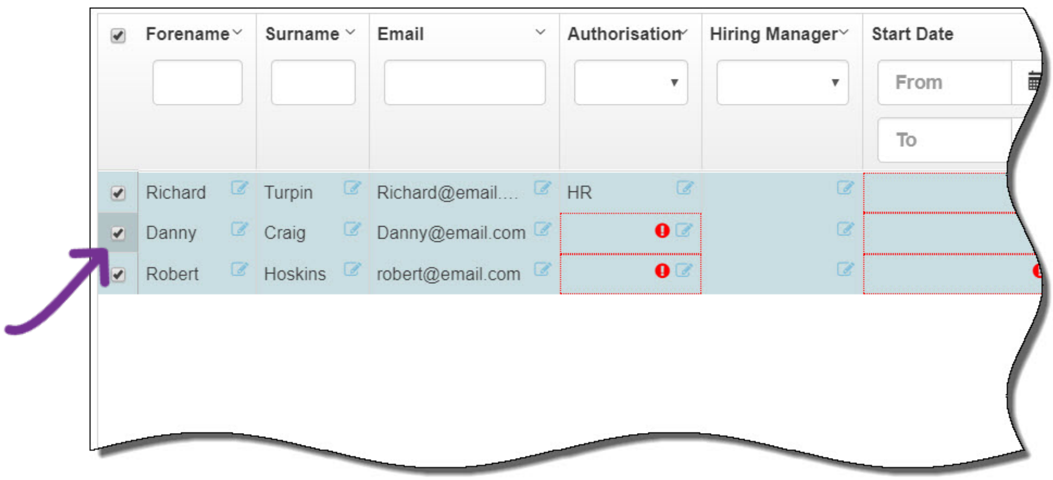



*Figure 11.1.3.1*

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

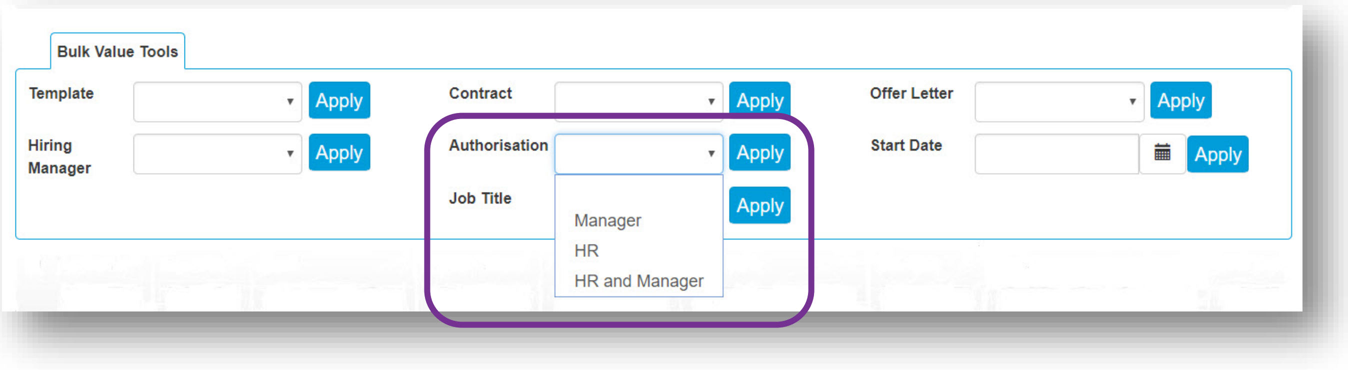



*Figure 11.1.3.2*

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

**6** All Onboardee records will now be created

**7** Click Yes to on the pop up window, to return to the **Imports** list

**8** Select **Onboardee** from the menu to view and/or amend the newly imported Onboardee records

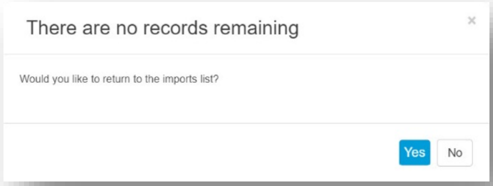



*Figure 11.1.3.3*

## 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.

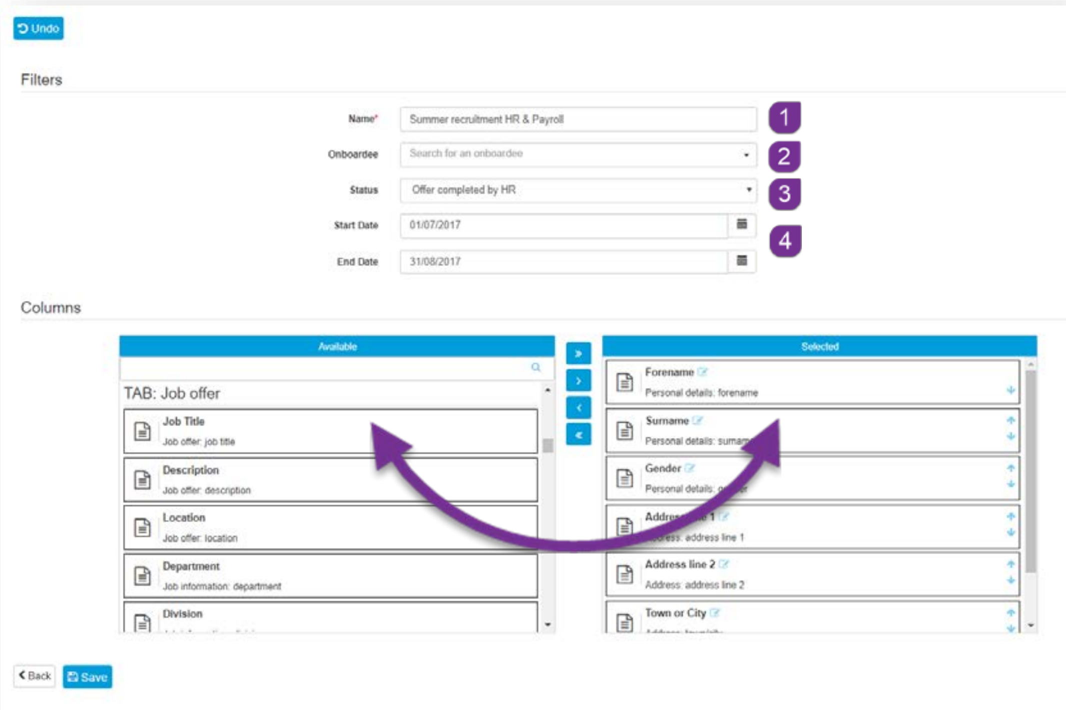



*Figure 11.2.1*

**16** Click Save to keep your changes

**17** Once saved, go to the top of the screen and click Run Export

**18** The screen will change, click View Report to see the data that has been returned

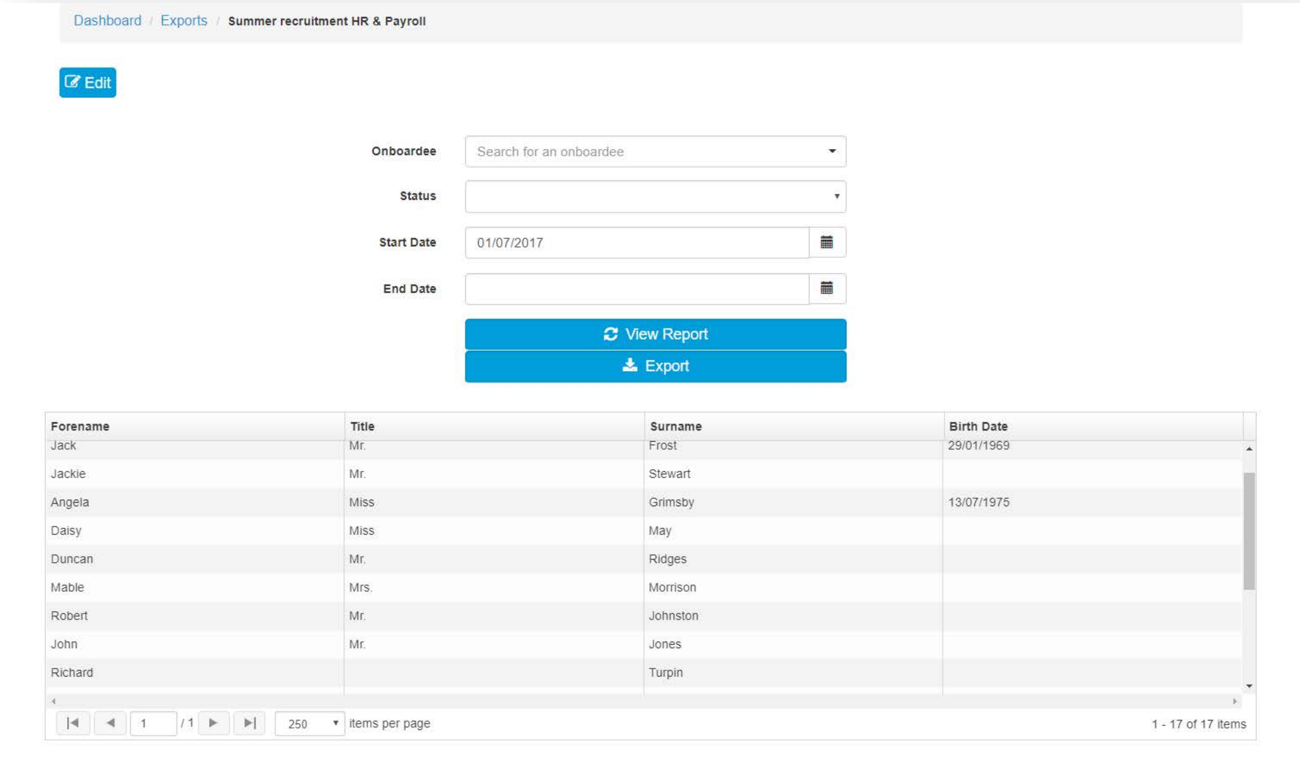


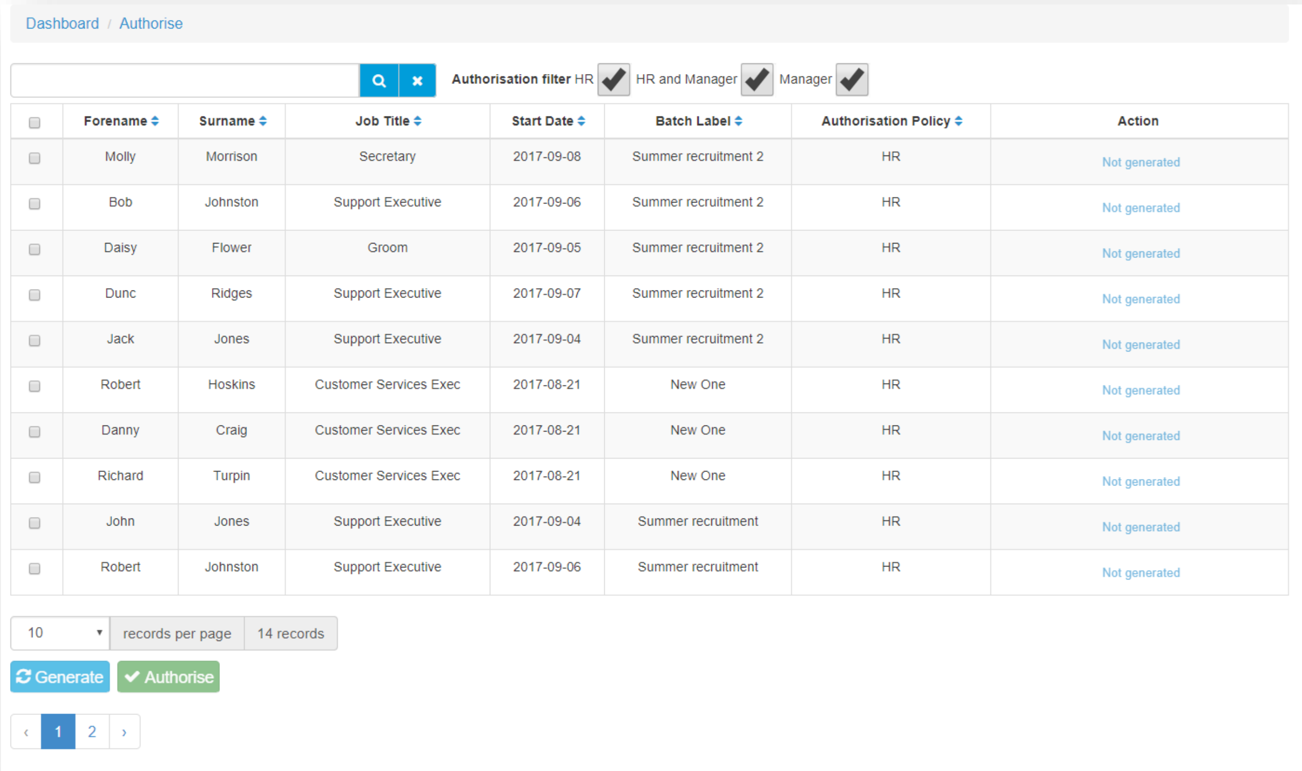

*Figure 11.2.2*

**19** Click Export 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 Onboardee records that are waiting to be authorised, and have documents generated. From here, you can either authorise records individually or altogether.




| | Forename | Surname | Job Title | Start Date | Batch Label | Authorisation Policy | Action |
|---|---|---|---|---|---|---|---|
| | Molly | Morrison | Secretary | 2017-09-08 | Summer recruitment 2 | HR | Not generated |
| | Bob | Johnston | Support Executive | 2017-09-06 | Summer recruitment 2 | HR | Not generated |
| | Daisy | Flower | Groom | 2017-09-05 | Summer recruitment 2 | HR | Not generated |
| | Dunc | Ridges | Support Executive | 2017-09-07 | Summer recruitment 2 | HR | Not generated |
| | Jack | Jones | Support Executive | 2017-09-04 | Summer recruitment 2 | HR | Not generated |
| | Robert | Hoskins | Customer Services Exec | 2017-08-21 | New One | HR | Not generated |
| | Danny | Craig | Customer Services Exec | 2017-08-21 | New One | HR | Not generated |
| | Richard | Turpin | Customer Services Exec | 2017-08-21 | New One | HR | Not generated |
| | John | Jones | Support Executive | 2017-09-04 | Summer recruitment | HR | Not generated |
| | Robert | Johnston | Support Executive | 2017-09-06 | Summer recruitment | HR | Not generated |

*Figure 11.3.1*

### 11.3.1 How to Authorise Onboardee 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 **Onboardee(s)** record that you would like to **Authorise**, using the tick box 5

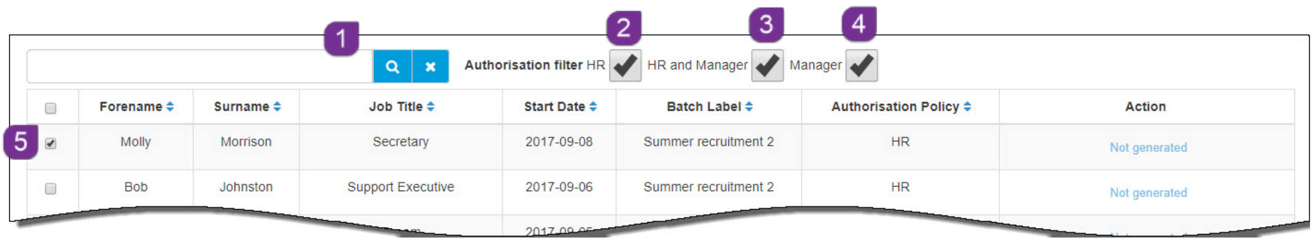



*Figure 11.3.2*

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

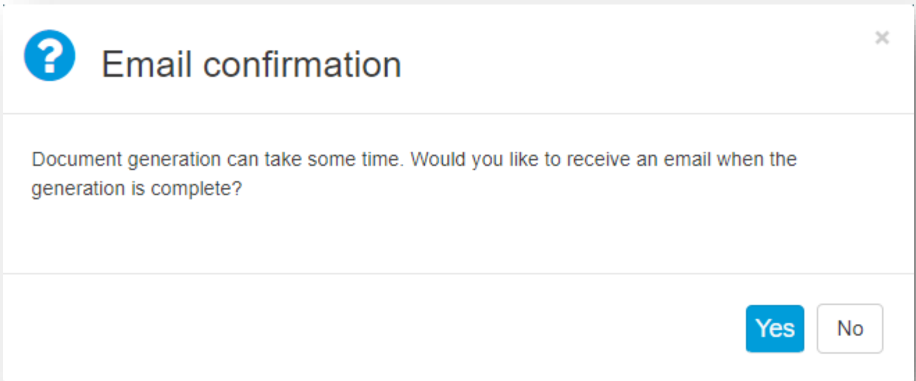



*Figure 11.3.3*

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

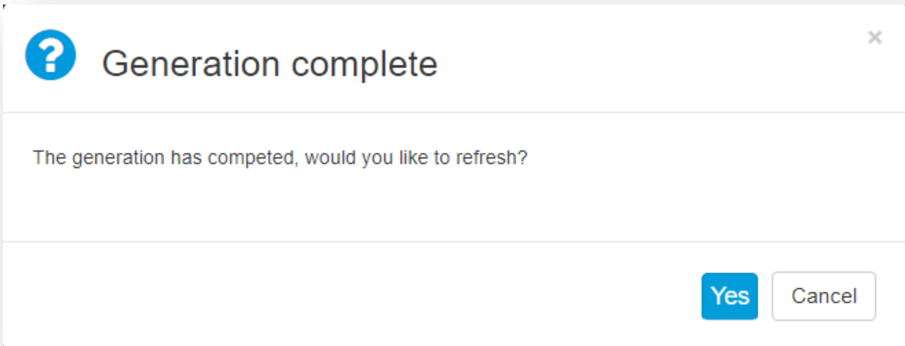
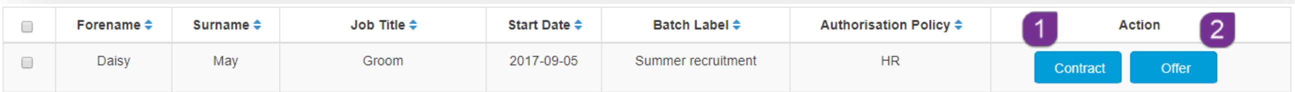



*Figure 11.3.4*

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 | Action |
|---|---|---|---|---|---|---|---|
| | Daisy | May | Groom | 2017-09-05 | Summer recruitment | HR | 1 Contract 2 Offer |

*Figure 11.3.5*

8 Click on either the **Contract** 1 or **Offer** 2 button to view the document

9 Click the ✔ Authorise 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 Onboardee data as you view or export the information ready to import to a different application if required.

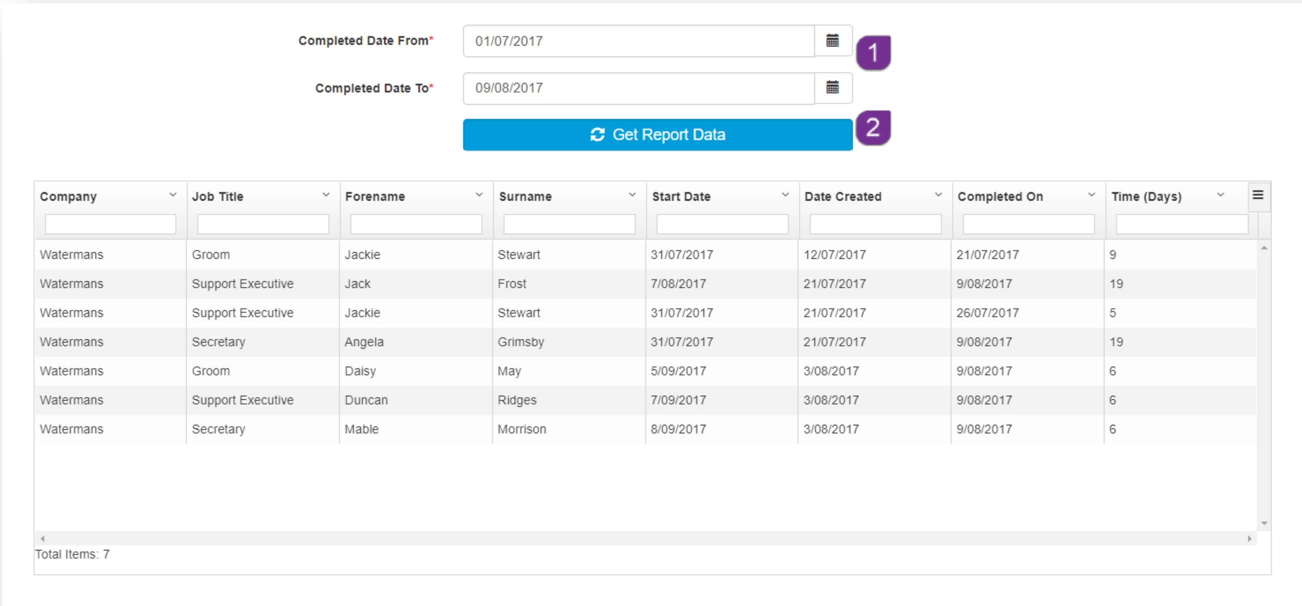
Navigate to **Reports** in the **Menu**, click on **Reports** to see a list of pre-written reports that you can run.

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 Onboardee 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 Onboardees 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

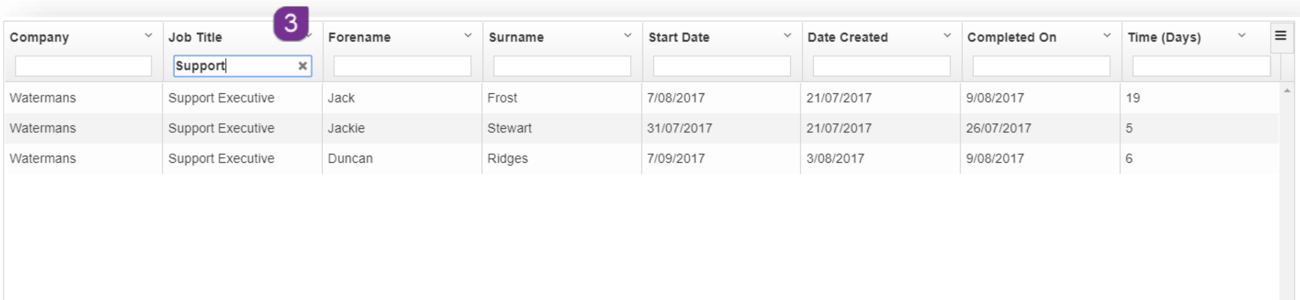
1. Click on the report that you would like to view
2. Enter the date period that the report is to cover 1
3. Click **Get Report Data** 2




| Company | Job Title | Forename | Surname | Start Date | Date Created | Completed On | Time (Days) |
|---|---|---|---|---|---|---|---|
| Watermans | Groom | Jackie | Stewart | 31/07/2017 | 12/07/2017 | 21/07/2017 | 9 |
| Watermans | Support Executive | Jack | Frost | 7/08/2017 | 21/07/2017 | 9/08/2017 | 19 |
| Watermans | Support Executive | Jackie | Stewart | 31/07/2017 | 21/07/2017 | 26/07/2017 | 5 |
| Watermans | Secretary | Angela | Grimsby | 31/07/2017 | 21/07/2017 | 9/08/2017 | 19 |
| Watermans | Groom | Daisy | May | 5/09/2017 | 3/08/2017 | 9/08/2017 | 6 |
| Watermans | Support Executive | Duncan | Ridges | 7/09/2017 | 3/08/2017 | 9/08/2017 | 6 |
| Watermans | Secretary | Mable | Morrison | 8/09/2017 | 3/08/2017 | 9/08/2017 | 6 |

*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.




| Company | Job Title | Forename | Surname | Start Date | Date Created | Completed On | Time (Days) |
|---|---|---|---|---|---|---|---|
| Watermans | Support Executive | Jack | Frost | 7/08/2017 | 21/07/2017 | 9/08/2017 | 19 |
| Watermans | Support Executive | Jackie | Stewart | 31/07/2017 | 21/07/2017 | 26/07/2017 | 5 |
| Watermans | Support Executive | Duncan | Ridges | 7/09/2017 | 3/08/2017 | 9/08/2017 | 6 |

*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

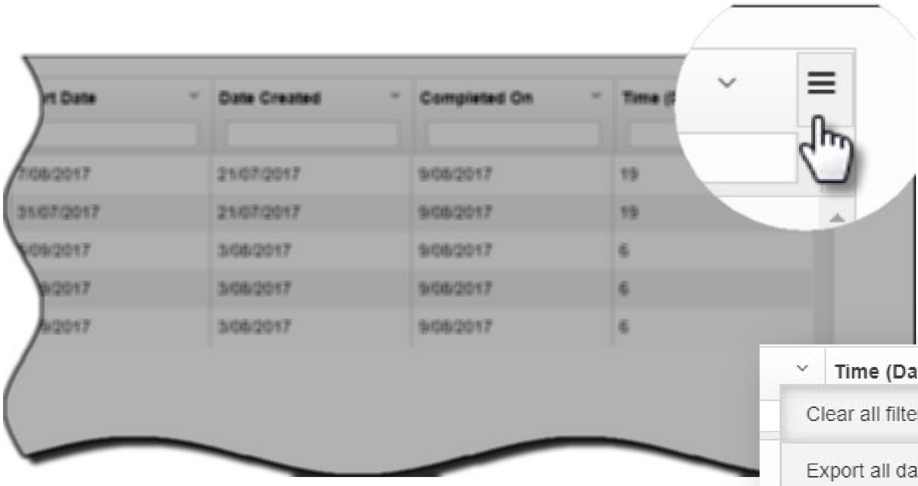



*Figure 12.1.1.1*

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

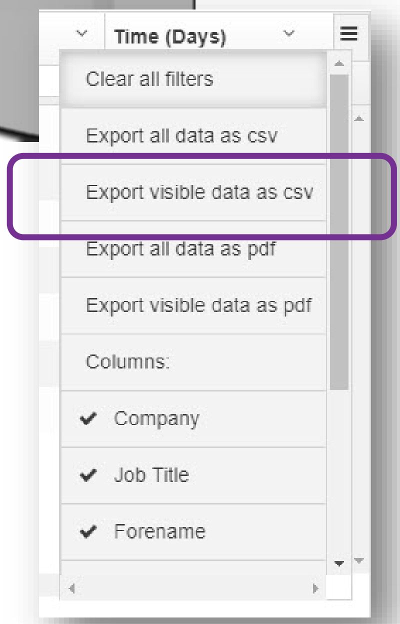


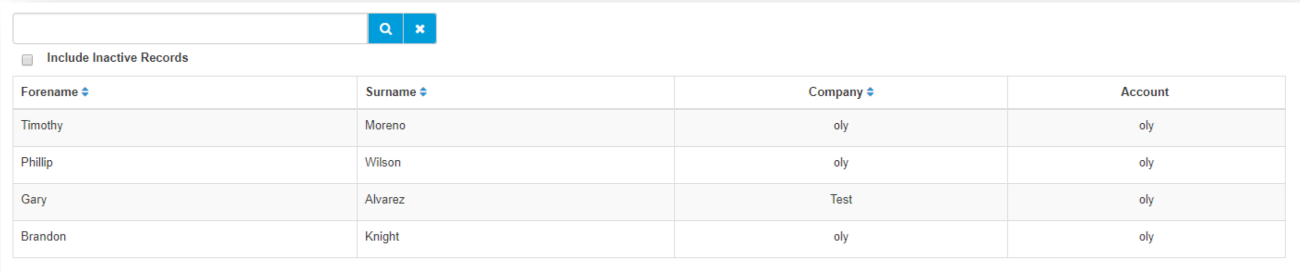

*Figure 12.1.1.2*

# 13.0 Feedback

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

This section will list all Onboardees 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 Onboardees that have completed the **Feeback Questionaire**



Include Inactive Records

| 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 **Onboardee** to see the completed details of the **Feedback Questionaire**

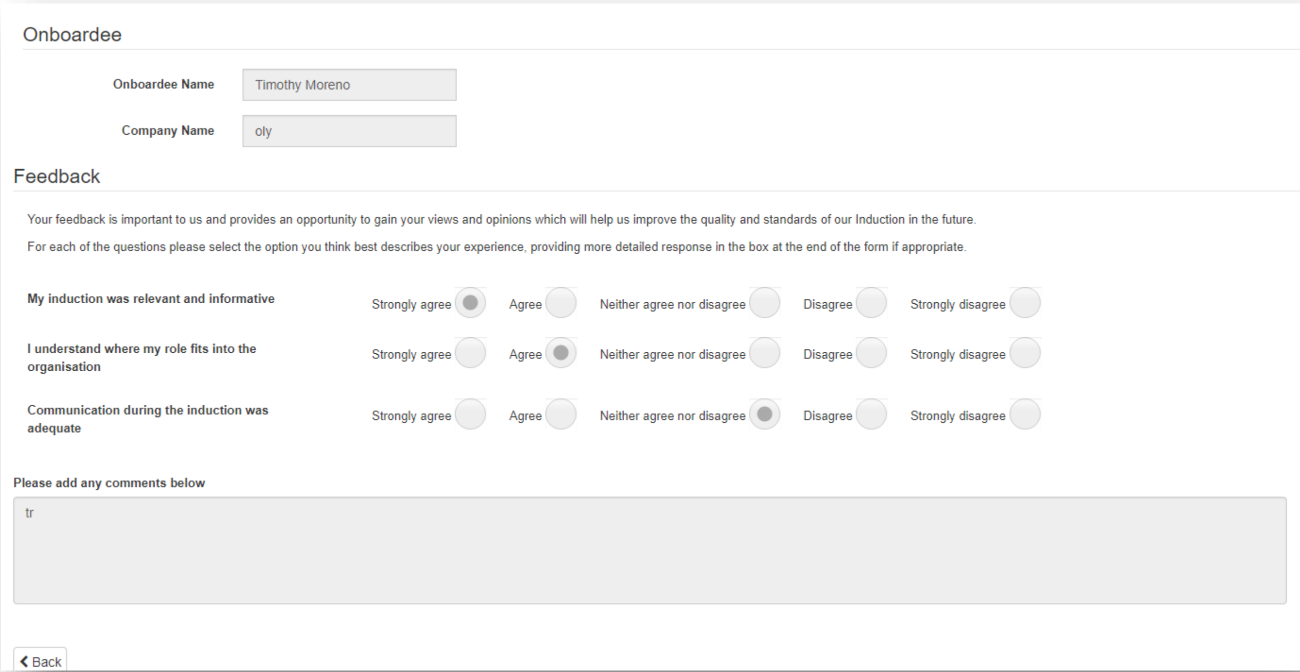



*Figure 13.0.2*

# 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.**

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