

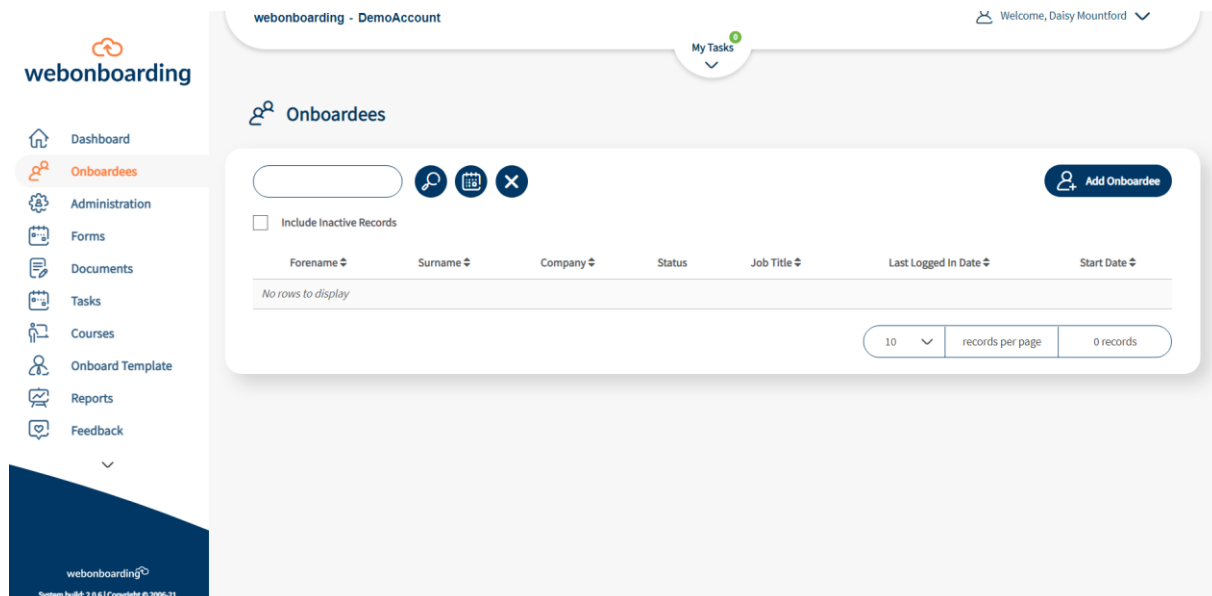
Adding an Onboarder

This document contains a step by step guide to adding an onboarder.

The onboarder is the person receiving the job offer.

How to create an Onboarder record

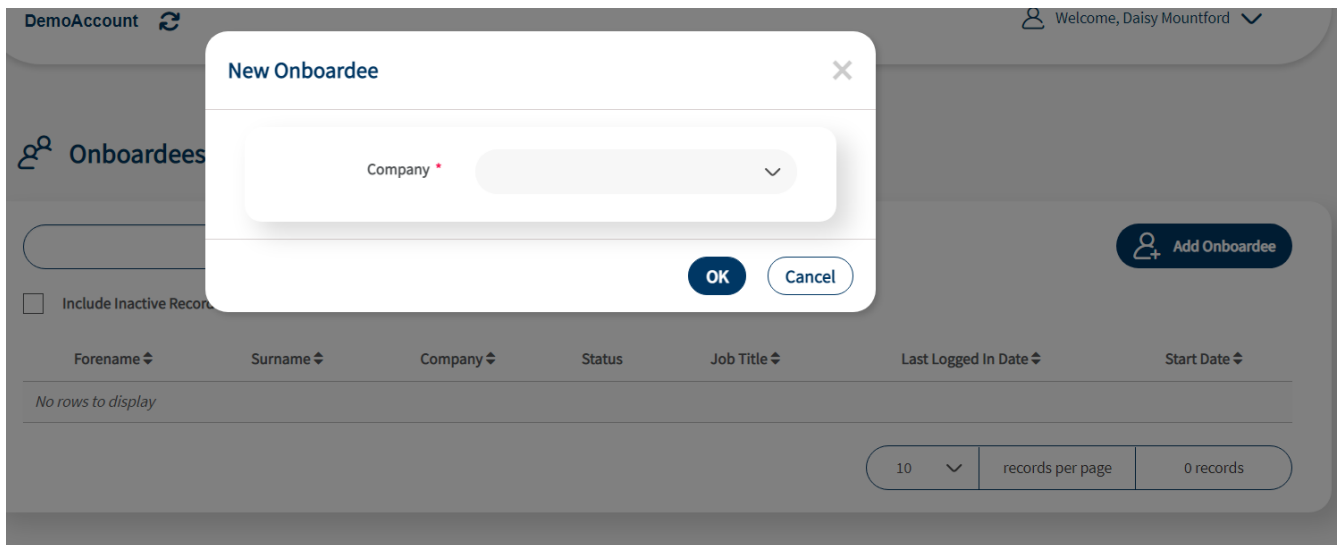
From the dashboard or menu navigate to Onboarders.



Click the “Add Onboarder” button on the right hand side of the screen.

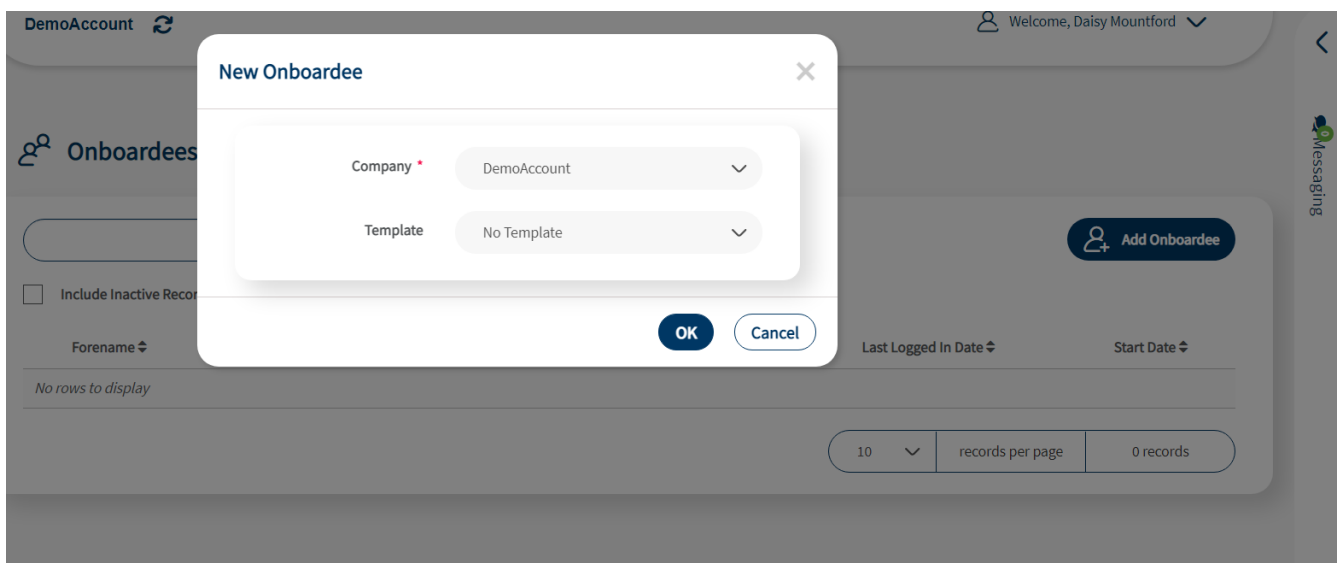


If you have multiple companies available and you are not already filtered to one company you will be asked to select the company that you want to put that Onboarder against.



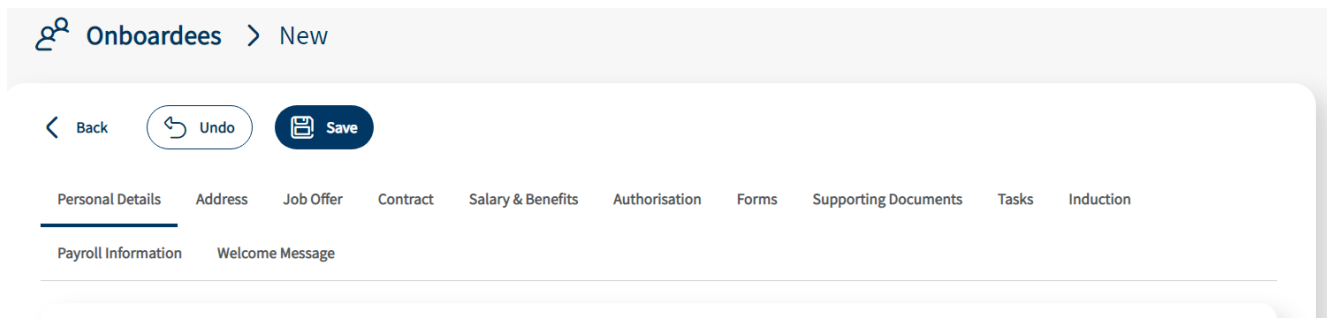
The screenshot shows the 'New Onboarder' modal form. The 'Company' field is a dropdown menu with a red asterisk indicating it is mandatory. The background shows the 'Onboarders' table with columns: Forename, Surname, Company, Status, Job Title, Last Logged In Date, and Start Date. The table is currently empty, showing 'No rows to display'. The pagination shows 10 records per page and 0 records.

If you have set up onboarder templates you'll be able to select the relevant one here. If you are adding an Onboarder without a template simply select "no template".



The screenshot shows the 'New Onboarder' modal form with two dropdown menus. The 'Company' field is set to 'DemoAccount' and the 'Template' field is set to 'No Template'. Both fields have a red asterisk indicating they are mandatory. The background shows the 'Onboarders' table with columns: Forename, Surname, Company, Status, Job Title, Last Logged In Date, and Start Date. The table is currently empty, showing 'No rows to display'. The pagination shows 10 records per page and 0 records.

Please enter all the relevant information working your way across the tabs - please remember everything marked with a * is mandatory. These fields in these sections correspond with merge fields that are used within the contract, offer letters and forms. Please see the separate sections that cover each tab.



The screenshot shows the 'Onboarders' section with a 'New' button. Below this is a form with a navigation bar containing tabs: Personal Details, Address, Job Offer, Contract, Salary & Benefits, Authorisation, Forms, Supporting Documents, Tasks, and Induction. Below the tabs are two more sections: Payroll Information and Welcome Message. At the top of the form are three buttons: Back, Undo, and Save.

Once everything is completed click save.

NB – If you click save before all mandatory details are added the sections with missing information will be highlighted.

Once you have saved this Onboarder record you can create the contract to go through the chosen authorisation process before the system sends an email to the Onboarder.

Personal Details

In this section you can add personal details of the Onboarder. The mandatory fields here are in the identity section, Forename and Surname but other information can be added. The fields in this section are used by the merge fields that you can add to Documents and Forms.

The fields in the personal section are designed to be completed by the Onboarder.

You can also mark Onboarders as Inactive here which removes their ability to access the system, they are defaulted to Active though.

Address

This section can take address details for the Onboarder. The only required field is their Email address in the Contact section but you can add other address details you have. The fields in this section are used by the merge fields that you can add to Documents and Forms.

The fields in the Emergency Contacts section are designed to be completed by the Onboarder.

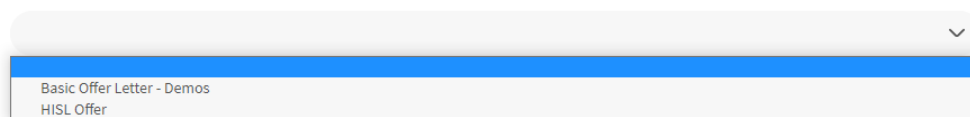
Job Offer

In this section you can start to build information about the offer. Any fields that are included in the Onboard Template (if using one) will already be completed.

In the Offer Template section you will be able to add an Offer Letter from the Document Library. The drop down list here will show all Offer Letters available for the Company you are adding the Onboarder to. If nothing shows in this list please check that you have Offer Letters set up for that Company.

Offer Template

Offer Letter *

A screenshot of a dropdown menu for 'Offer Letter'. The menu is open, showing two options: 'Basic Offer Letter - Demos' and 'HISL Offer'. The first option is highlighted with a blue background. The dropdown is part of a form labeled 'Offer Template'.

Job Information

The only other mandatory field in this section is Title which is the title of the job. You can complete any other relevant information here and these fields are available to merge into Documents, Forms and email templates.

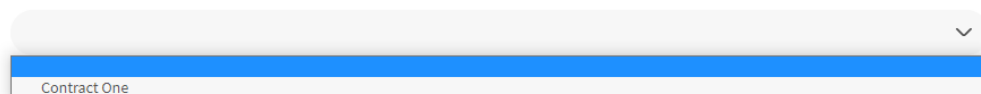
Contract

In this section you can add more information about the contract and offer. Any fields that are included in the Onboard template (if using one) will already be completed.

In the Contract Template section you will be able to add a Contract from the Document Library. The drop down list here will show all Contracts available for the Company you are adding the Onboarder to. If nothing shows in this list please check that you have Contracts set up for that Company.

Contract Template

Contract *

A screenshot of a dropdown menu for 'Contract'. The menu is open, showing one option: 'Contract One'. The option is highlighted with a blue background. The dropdown is part of a form labeled 'Contract Template'.

The only other mandatory field in this section is Start Date which is the date you expect an Onboarder to start their role. The start date can be changed at any point and it gets used to trigger events for that Onboarder. You can also complete any other relevant information here, these fields are available to merge into Documents, Forms and email templates.

Salary and Benefits

In this section you can add other relevant information for the Offer and Contract, these fields are available to merge into Documents, Forms and email templates. Any information on Onboarder Templates (if using one) will already be completed. None of these fields are mandatory but most will be used by Contract and Offer Letters.

Authorisation

In this section you can add details that sit around the process. In Process Details you can check the Company they are associated to and see the current Status.

In Authorisation you can select the pathway and people who need to authorise the process for the Onboarder, see the table below for details of each path.

Authorisation



Authorise By *

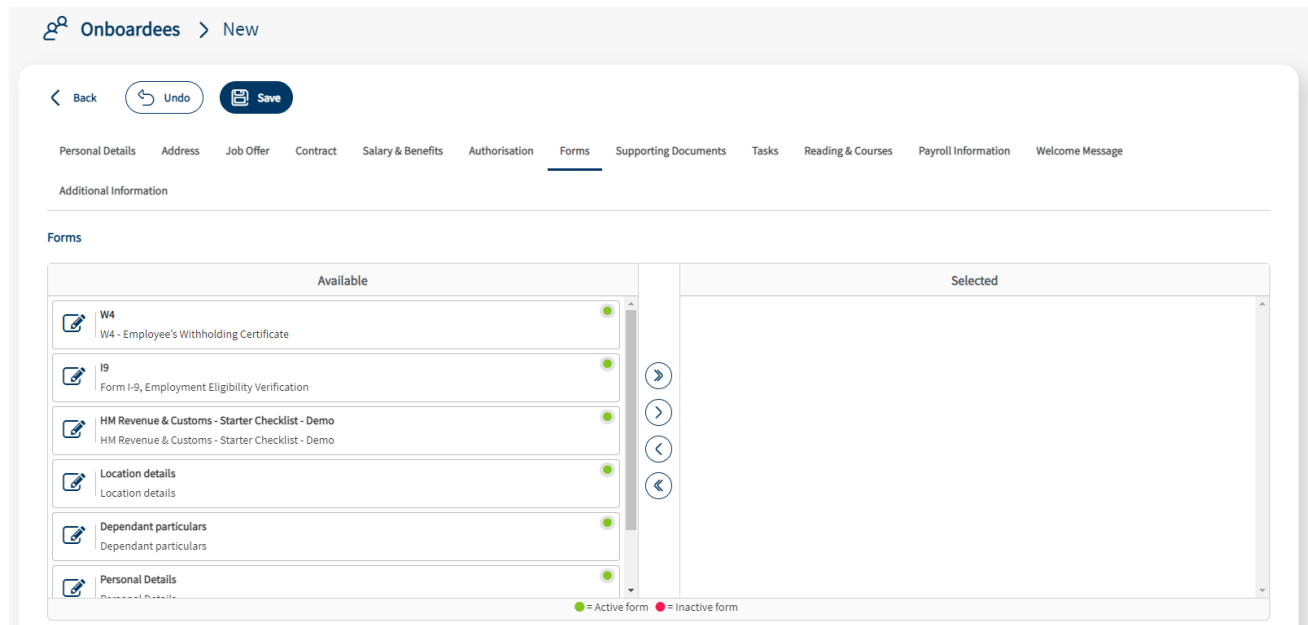
Hiring Manager


Manager
HR
HR and Manager

Authorise By	Description
Manager	This pathway will make the Hiring Manager field mandatory. On generating the documentation the details will be emailed to the Manager selected and they will be reminded to complete this.
HR	On generating the documentation anyone with a HR role will be able to complete this. They will also receive email reminders to do so.
HR and Manager	This pathway will make the Hiring Manager field mandatory. On generating the documentation the details will be emailed to the Manager selected and anyone with a HR role to complete. They will both receive email reminders.

Forms

In this section you can add Forms that you want the Onboarder to complete as part of their process that are available in the Company you are adding the Onboarder to. Simply double click or use the arrow buttons  and  to add Forms. Any Forms that are included in the Onboarder Template will already be added to the right hand box.



















 Onboarders > New



[Back](#) [Undo](#) [Save](#)

Personal Details Address Job Offer Contract Salary & Benefits Authorisation **Forms** Supporting Documents Tasks Reading & Courses Payroll Information Welcome Message



Additional Information

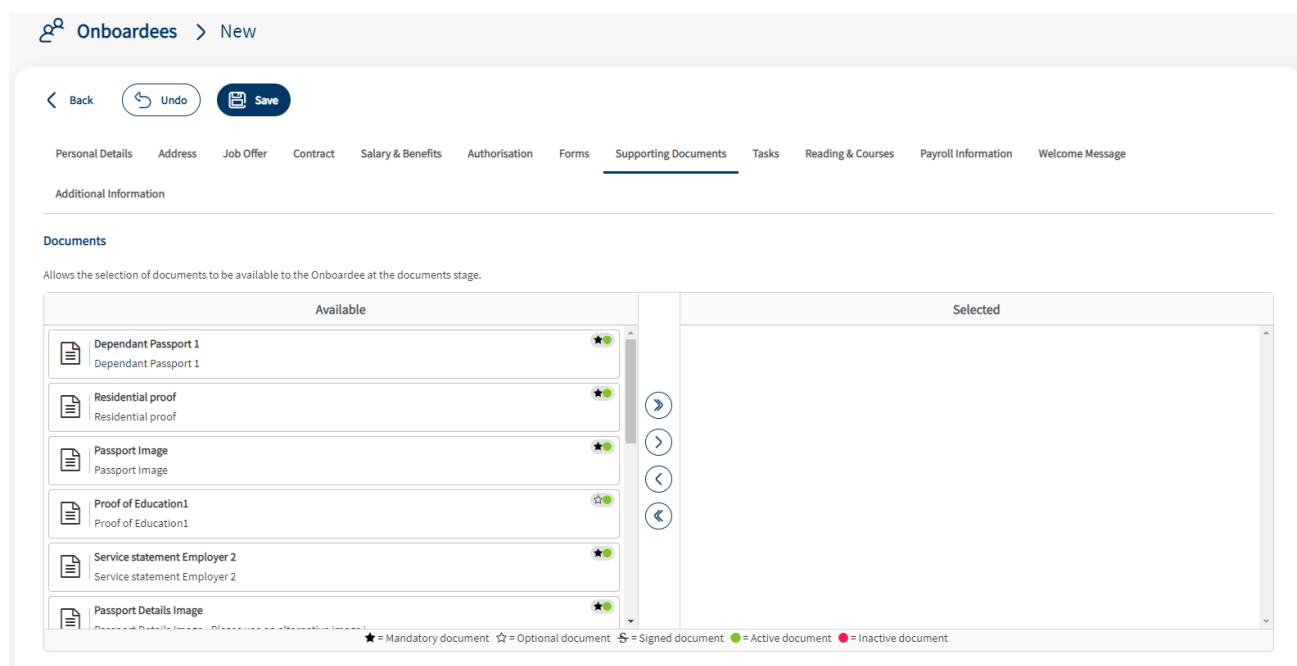
Forms

Available		Selected
 W4 W4 - Employee's Withholding Certificate		   
 I9 Form I-9, Employment Eligibility Verification		
 HM Revenue & Customs - Starter Checklist - Demo HM Revenue & Customs - Starter Checklist - Demo		
 Location details Location details		
 Dependant particulars Dependant particulars		
 Personal Details Personal Details		



















 = Active form  = Inactive form

Supporting Documents

In this section you can add other documents that you want the Onboarder to upload or complete as part of their process. Simply double click or use the arrow buttons  and  to add Documents. Any Documents that are included in the Onboarder Template will already be added to the right hand box. The key at the bottom will help differentiate documents.





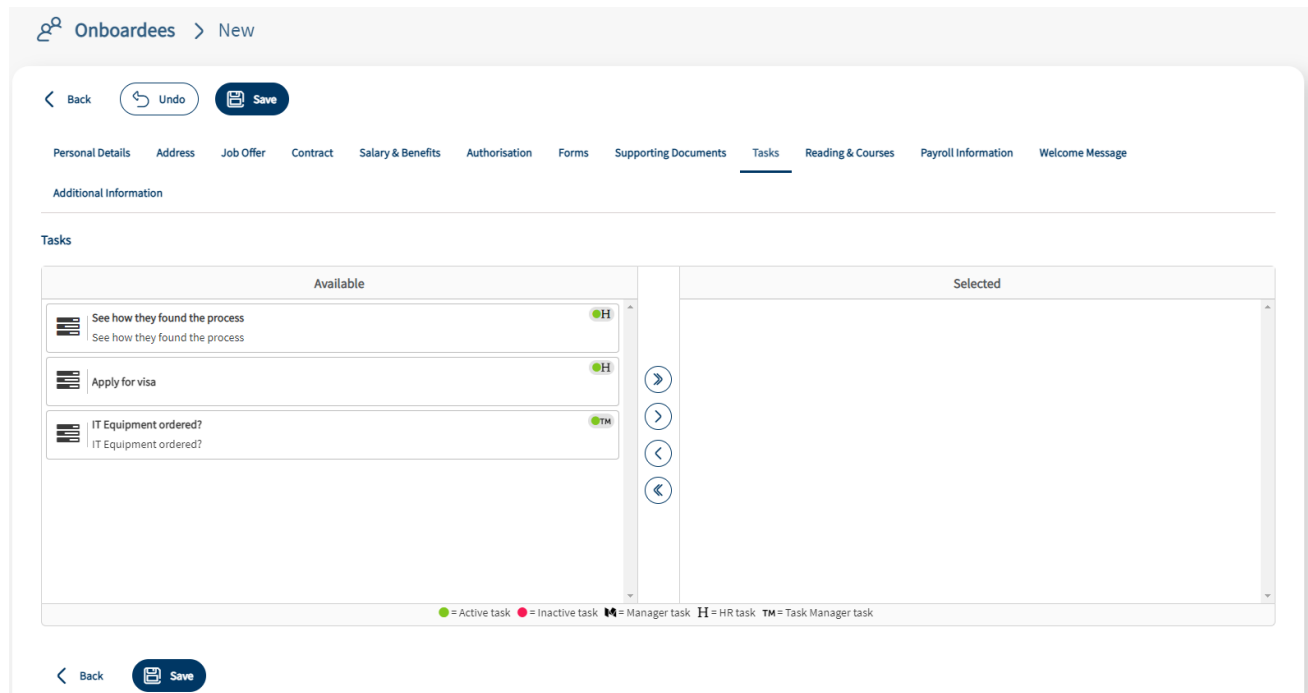
The screenshot shows the 'Supporting Documents' section of the 'New Onboarder' setup. The interface includes a breadcrumb 'Onboarders > New' and a navigation bar with tabs: Personal Details, Address, Job Offer, Contract, Salary & Benefits, Authorisation, Forms, Supporting Documents (active), Tasks, Reading & Courses, Payroll Information, and Welcome Message. Below the tabs is a 'Documents' section with a description: 'Allows the selection of documents to be available to the Onboarder at the documents stage.' It features two columns: 'Available' and 'Selected'. The 'Available' column lists six documents, each with a document icon, a title, a subtitle, and a status icon (star for mandatory/optional, arrow for signed, green dot for active, red dot for inactive). The 'Selected' column is currently empty. Between the columns are four arrow buttons: a single right arrow, a double right arrow, a single left arrow, and a double left arrow. A legend at the bottom explains the icons: ★ = Mandatory document, ☆ = Optional document, ➡ = Signed document, ● = Active document, ● = Inactive document.

Available	Selected
<div> Dependant Passport 1 Dependant Passport 1</div> <div> </div>	
<div> Residential proof Residential proof</div> <div> </div>	
<div> Passport Image Passport Image</div> <div> </div>	
<div> Proof of Education1 Proof of Education1</div> <div> </div>	
<div> Service statement Employer 2 Service statement Employer 2</div> <div> </div>	
<div> Passport Details Image Passport Details Image</div> <div> </div>	

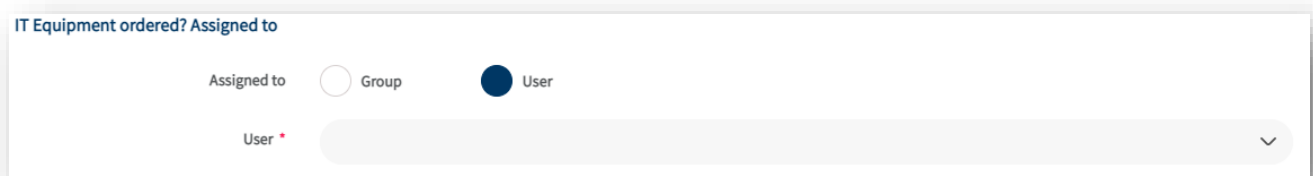
★ = Mandatory document ☆ = Optional document ➡ = Signed document ● = Active document ● = Inactive document

Tasks



In this section you can add Tasks that you want to be completed as part of the Onboarder process by internal users. Simply double click or use the arrow buttons  and  to add Tasks. Any Tasks that are included in the Onboarder Template will already be added to the right hand box. The key at the bottom will help differentiate Tasks.

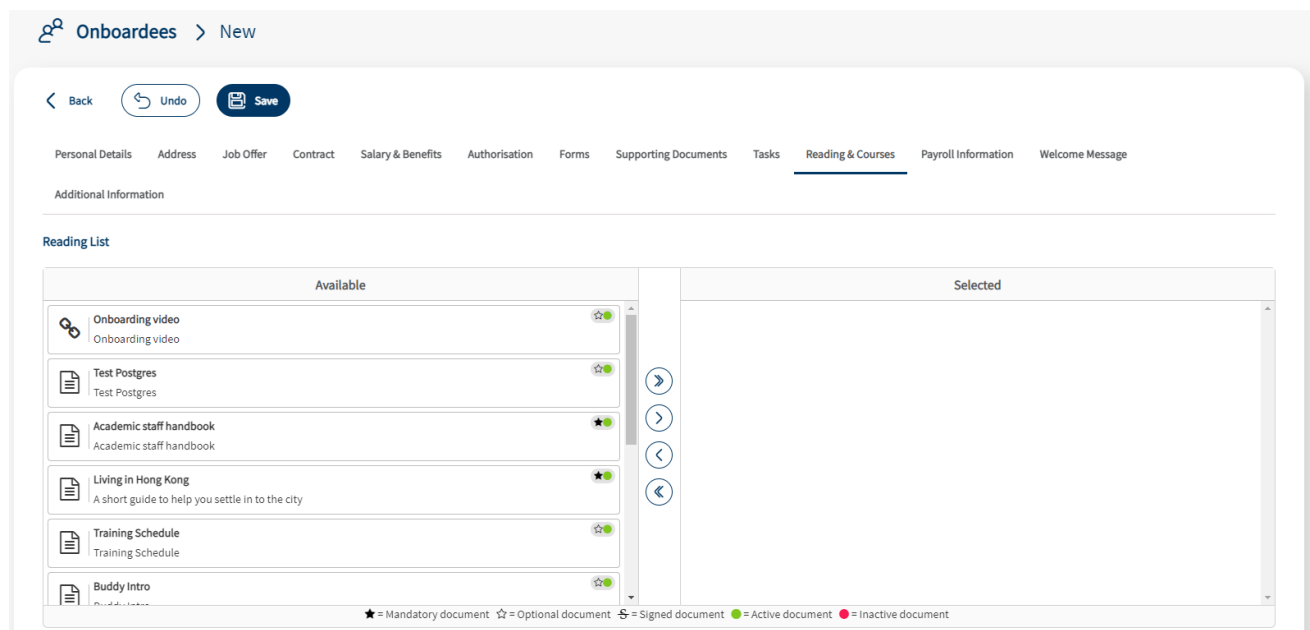


If you add a Task Manager task you will have an additional option of assigning the task to the Group or to an individual User. Selecting user will add a drop down box to select the relevant User.



Reading and Courses

In this section you can add Reading Items and Courses that you want the Onboarder to read or sign up to. There is a box for Reading Items and a separate box for Courses. Simply double click or use the arrow buttons  and  to add them. Any that were included in the Onboarder Template will already be added to the right hand boxes. The key at the bottom will help differentiate.















Onboarders > New


Back Undo Save

Personal Details Address Job Offer Contract Salary & Benefits Authorisation Forms Supporting Documents Tasks **Reading & Courses** Payroll Information Welcome Message

Additional Information

Reading List

Available		Selected
 Onboarding video Onboarding video		
 Test Postgres Test Postgres		
 Academic staff handbook Academic staff handbook		
 Living in Hong Kong A short guide to help you settle in to the city		
 Training Schedule Training Schedule		
 Buddy Intro Buddy Intro		

★ = Mandatory document ☆ = Optional document  = Signed document ● = Active document ● = Inactive document

Payroll Information

This section is designed to review payroll information that the Onboarder has added. You can edit the information here if required.

Welcome Message

This section allows you to write an individualised message for the Onboarder that will appear on their Welcome Page if you have that feature switched on.

Additional Information

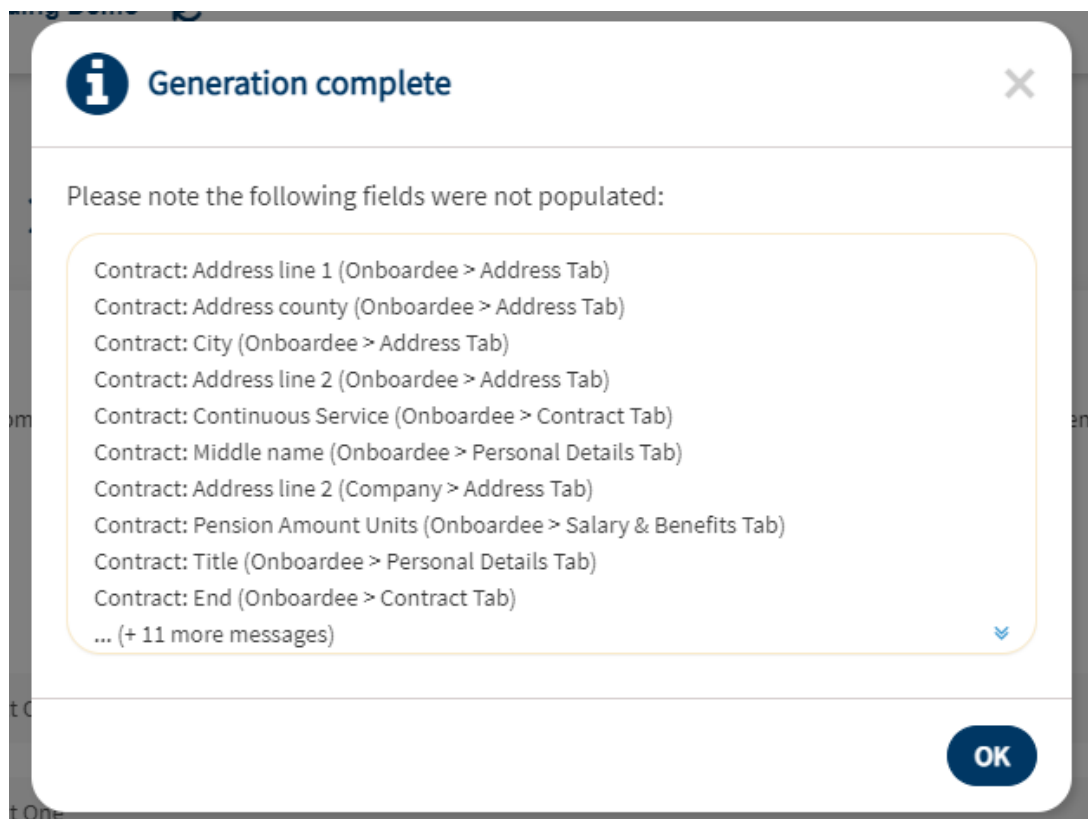
This section will show any additional fields that have been added to the system will show. Any mandatory fields here will be highlighted for completion before you generate an offer.

Authorising the Offer


Once completed and saved you can authorise the offer to send it out to the Onboarder. Use the Review Offer button to begin this process.

Review Offer

This will navigate you to the Review page and generate the documents with merge fields for the process. If any merge fields have not been populated they will be highlighted in an information box to ensure no essential fields are missed.




Any generated documents (Contracts, Offer Letters, Signed Documents) will be available to be downloaded or viewed in the system for review purposes. If there are any corrections to be made click on the Onboarder name at the top of the page to navigate back and make changes.

 Onboarders > Bill London > Review Offer



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 onboarder.

 HR: Not yet authorised

Contract

Name	Contract One
File Name	Contract One
File Extension	PDF
Generated On	24/05/2022 17:28

 Download  View

Offer letter

Name	Basic Offer Letter - Demos
File Name	Basic Offer Letter - Demos
File Extension	PDF

If you are happy that everything is completed and you are included in the authorisation chain you can authorise the documents at the bottom of the page. Once all authorisation processes are completed the initial emails will be sent to the Onboarder.