

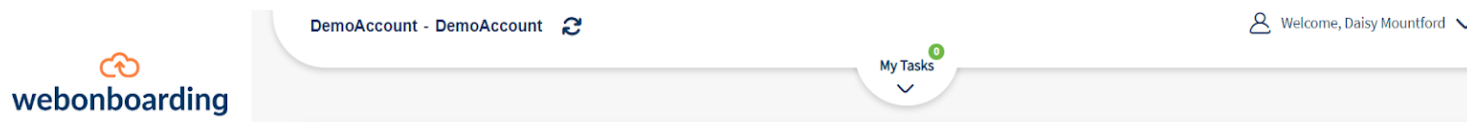
Adding an onboard template (JOB ROLE/POSITION)

The Onboard Template section is accessible once you have switched into a Company set up in your Account (if you are a system admin, you will have the option to add templates at account level).

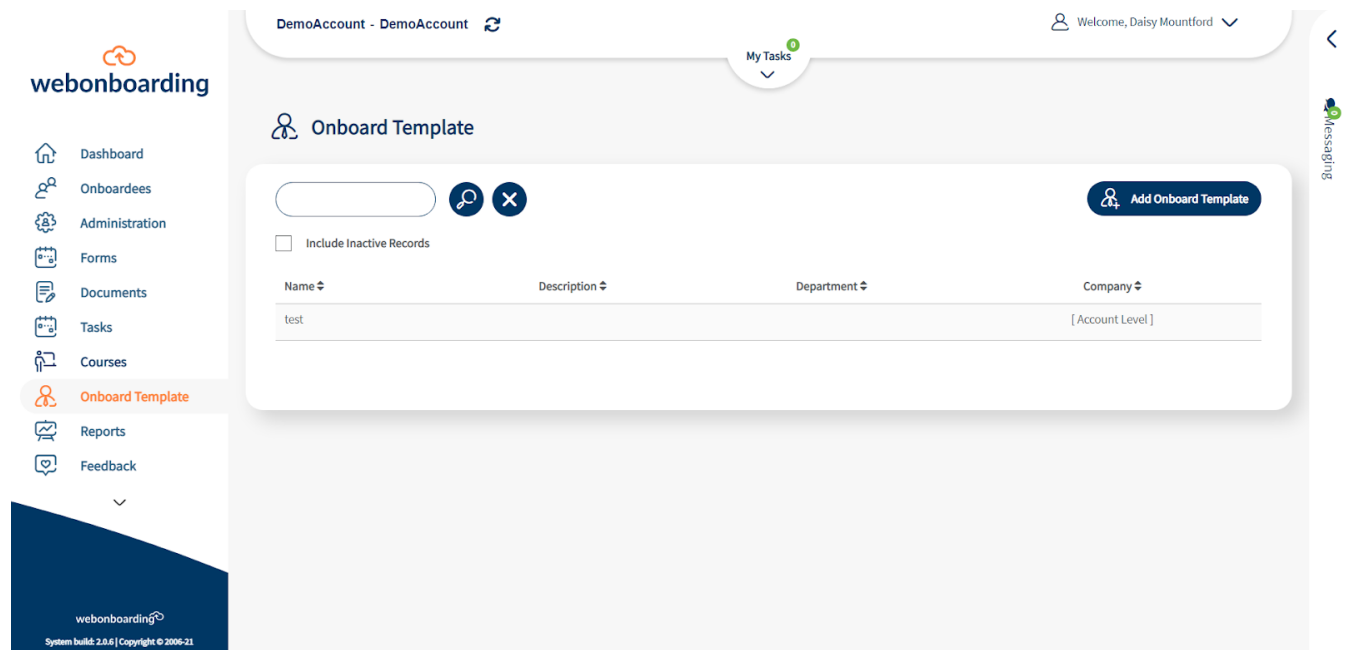
This section is where you can create set templates for Job Roles and Positions that are recruited for. Once the template has been created, it can be used time and time again, as part of the Onboarding process. Information from the template will help populate many of the fields in the Onboarder record.

Switch into the Company that you want to create the template for.

If you are setting up an account level template (please note, unless you are a system admin you will not have the ability to do this) ensure you clear your company filter.



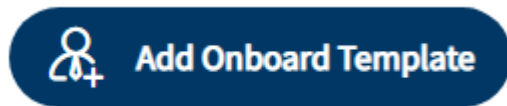
From the left-hand side menu, navigate to Onboard Template



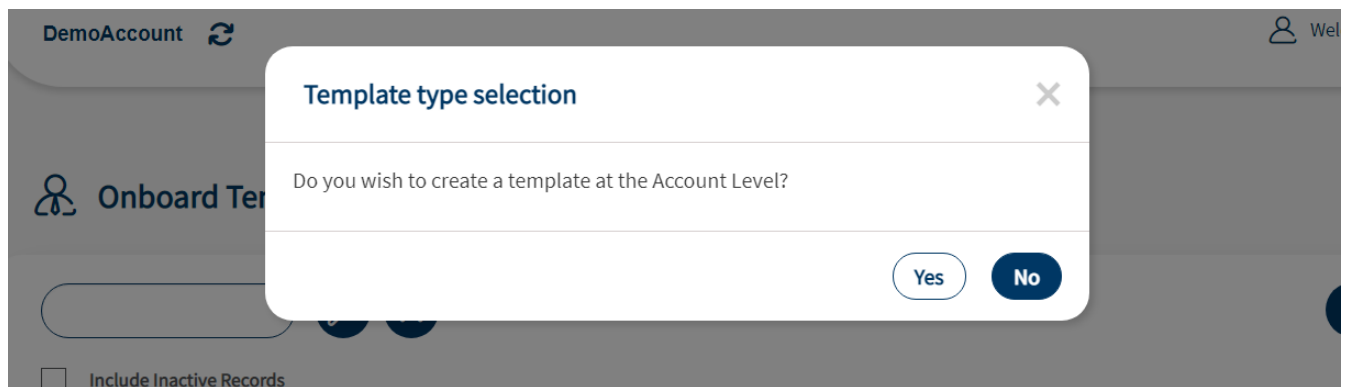
Click Add onboard template on the right-hand side of the screen.

Admin Training

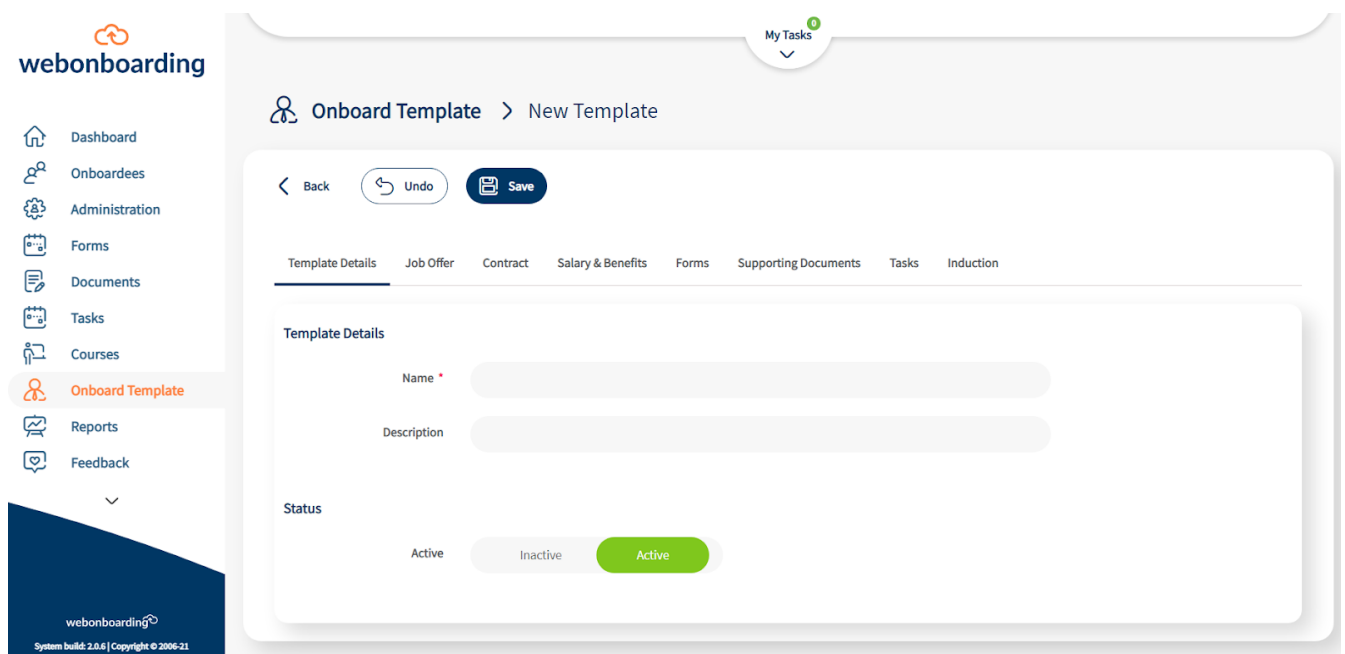
Creating an Onboard template



You will then see the below pop up. Please note creating a template at account level will make this template accessible from all companies under that account.



In the Template Details tab, enter a Name and optional description



Ensure that the Active box is ticked to be able to assign the Onboard Template

Work your way across all tabs filling out the relevant information.

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Creating an Onboard template



Please note, if you are creating an account level template you will only see offer letters, contracts, forms, documents tasks and reading list (induction) items available for all companies.

The screenshot shows the 'Onboard Template' creation interface. On the left is a sidebar with the 'webonboarding' logo and a list of navigation items: Dashboard, Onboardees, Administration, Forms, Documents, Tasks, Courses, Onboard Template (highlighted), Reports, and Feedback. The main content area is titled 'Onboard Template > New Template'. It features a top bar with 'Back', 'Undo', and 'Save' buttons. Below this is a tabbed interface with tabs for 'Template Details', 'Job Offer' (selected), 'Contract', 'Salary & Benefits', 'Forms', 'Supporting Documents', 'Tasks', and 'Induction'. The 'Job Offer' tab contains two sections: 'Offer Template' with a dropdown menu currently showing 'Offer Letter', and 'Job Information' with input fields for 'Title', 'Description', 'Location', and 'Department'. The bottom of the sidebar contains the 'webonboarding' logo and the text 'System build: 2.0.6 | Copyright © 2006-21'.

This information pulls through to the merge fields on the contract. Unlike “adding an onboarder” all fields are optional when setting up the template.