

Admin Training

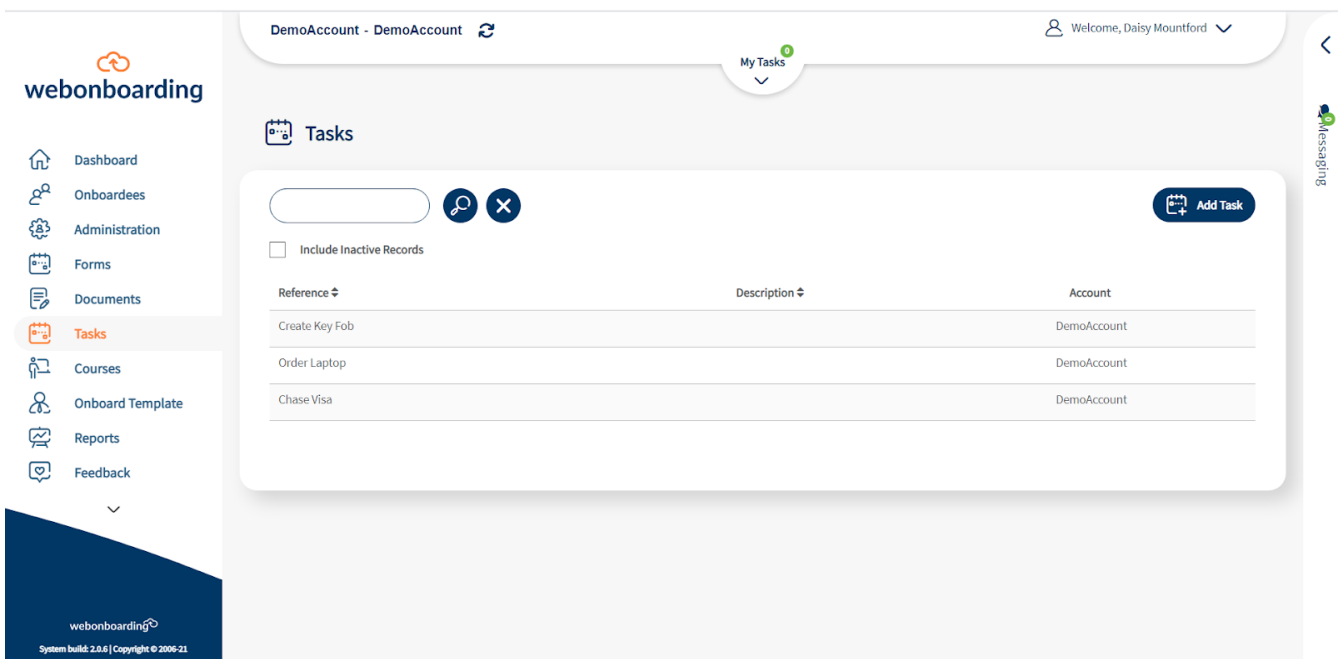
Tasks

Tasks.

Tasks are actions that need to be completed prior to the Onboarder's joining date by either HR, the Hiring Manager OR Task 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 and new onboarder records.

Adding a task.

From the Dashboard or Left-hand side menu, navigate to Tasks.



Click, "add task" on the right hand side.



In the General tab, enter a short Reference and Description.

In the Responsibility section of the tab, set the level of Importance by choosing High, Medium or Low from the drop down menu. Allocate who is responsible and who owns the Task by selecting Manager, HR or Task manager.

Admin Training Tasks

Tasks > Create Key Fob

[Back](#)
[+ Add](#)
[Edit](#)

[General](#)
[Companies](#)

Name

Reference *

Description

Responsibility

Importance *

Owner * Manager HR Task Manager

Target Date

Time Frame * days

Start Date * Before After

Example: The target date of this task will be 3 days before onboarding's start date.

Add the Time Frame for completion of the Task. This is the amount of days BEFORE OR AFTER the Onboarder's start date.

On the companies tab you can select which companies this task belongs to.

PLEASE NOTE IF YOU HAVE ASSIGNED A TASK TO A TASK MANAGER, THEY WILL HAVE LIMITED VISIBILITY OF THE ONBOARDER RECORD.