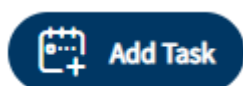


Tasks

Webonboarding allows companies to set up Tasks that can be assigned to an Onboarder process. Tasks are internal actions that need to be completed prior to, or just after, the Onboarder's start date. Tasks can be assigned to either the HR team, the Hiring Manager or a Task Manager and can be shared across multiple Companies or restricted to individual ones.

Adding a new Task

Navigate to Tasks from the menu and click 'Add Task' on the right hand side.



The screenshot shows the 'New Task' form in a web application. At the top, there's a breadcrumb 'Tasks > New'. Below this are three buttons: 'Back', 'Undo', and 'Save'. The form is divided into two tabs: 'General' (selected) and 'Companies'. Under the 'General' tab, there are several sections: 'Name' with 'Reference' and 'Description' fields; 'Responsibility' with an 'Importance' dropdown and an 'Owner' section with three radio buttons ('Manager' is selected, followed by 'HR' and 'Task Manager'); and 'Target Date' with a 'Time Frame' field (followed by 'days') and a 'Start Date' section with two radio buttons ('Before' and 'After'). At the bottom, a small example text reads: 'Example: The target date of this task will be 0 days before/after onboarder's start date.'

Field	Description
Reference	Unique reference for the Task, displayed in Onboarder profile and Activity
Description	A short description of the task to be completed.
Responsibility	The priority of the task – Low, Medium or High
Owner	Select from Manager, HR, Task Manager (see separate table for details)
Time Frame	A whole number of days
Start Date	Set to either that number of days before or after the Onboarder Start Date as the due date for the task

Once completed use the Companies tab to select the Companies that you want to have access to the Task.

Owner Roles

Role	Description
HR	When HR is selected as the Task Owner the task notifications will be delivered to the relevant HR group. That includes all Operators in the Onboarder's company with the HR Admin role.
Manager	When Manager is selected as the Task Owner the task notifications will be delivered to the Manager selected in the Onboarder profile. This is usually a Line Manager. Managers see a restricted level of information for onboarders.
Task Manager	A Task Manager can be anyone around the business. When Task Manager is selected as the Task Owner you will see an additional drop down menu to select the relevant Task Manager Group. This will allow task notifications to be delivered to the whole Task Manager Group or an individual in that Group (See applying tasks to process). Task Managers see a restricted level of information for related to the Task.