Tasks

Webonboarding allows companies to set up Tasks that can be assigned to an onboardee process. Tasks are internal actions that need to be completed prior to, or just after, the Onboardee'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 Task Manager Groups and Task Managers

In order to use Task Manager tasks there needs to be Task Manager Groups set up and Operators with the Task Manager role. To set up Task Manager Groups navigate to Administration > Task Manager Groups.

In here simply add a Name that best describes the Group then click on Companies to select the Companies that have these Groups apply to.

To add Task Managers to a group navigate to Administration > Operators. Select the Operator you want to add and then add Task Manager to their roles in the Security tab. This will bring up a new tab for 'Task Manager Groups'. In here you can add this Operator to Groups from the list on the left by double clicking, dragging and dropping or the ⟩ and ⟫ buttons.

For more details on adding Operators see our Operator guide.

Tracking and completing tasks

Tasks can show up in a number of places for both tracking and completion of them. HR Admins are the only users that are able to track all tasks against an individual Onboardee, all other users can track their own tasks.

Tracking and Completing Your Own Tasks – Task Manager

If you are a Task Manager then your tasks will be notified to you by email (unless you have opted out of receipt) and show up in the My Tasks section on the left hand menu.

In this section you will see Tasks that have been assigned to you as a Task Manager either as an individual (User Assigned) or as part of a group (Group Assigned). From here you can see a number of details about the task including the Task name, the Onboardee name, Start Date, Due Date, and Status.

You will also see 2 actions against each task. The speech bubble icon enables you to ask the HR team about the task and for any additional details required. The tick icon allows you to complete the individual task. You can also select multiple tasks with the checkboxes on the left hand side and mark all as complete.

Please note, if you mark a Group Assigned task as Complete it will remove it from email reminders for the entire group and take it out of the group list on the system for them to see.