

## Tasks

Webonboarding allows companies to set up Tasks that can be assigned to an onboarding 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.

### 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 Onboarder, all other users can track their own tasks.

### Tracking Tasks for an Onboarder

To track tasks against an individual Onboarder you can first look on the dashboard. In the Onboarding Progress table you can see any Onboarder whose process is not completed by HR which has a column labelled Pending Tasks.

Forename	Surname	Company	Progress indicator dots	Pending Tasks	Start Date	Days remaining
James	Cornwall	Webonboarding Demo	● ● ● ● ● ● ● ●	2	30/05/2022	6
Daisy	Edinburgh	Webonboarding Demo	● ● ● ● ● ● ● ●	2	06/06/2022	13
Bill	London	Webonboarding Demo	● ● ● ● ● ● ● ●	2	13/06/2022	20
Leanne	Wiltshire	Webonboarding Demo	● ● ● ● ● ● ● ●	2	20/06/2022	27

5 records per page 4 records

Pending Tasks in this column shows the number of incomplete tasks against that Onboarder's process. For more details on Dashboards see our Dashboard guide.

Clicking on an Onboarder in this table will navigate you to the Tasks section of that Onboarder's Activity.

Onboardees > James Cornwall > View Activity

HR Progress: 80%

Onboardee Progress: 75%

Process Flow: New -> Generated -> HR Authorised\* -> Open -> HR Complete (5)

Onboardee Flow: Contract -> My Details -> References (3) -> Forms -> Documents -> Accepted\* -> Reading -> Complete (8)

Navigation: Back

Contract Offer Forms Documents Reading List Training Feedback Emails **Tasks** Chats

Task Name	Importance	Type	Assignee	Due Date	Status	Days Remaining
Apply for visa	High	HR		30/04/2022	Incomplete	-25
See how they found the process	High	HR		29/05/2022	Incomplete	4

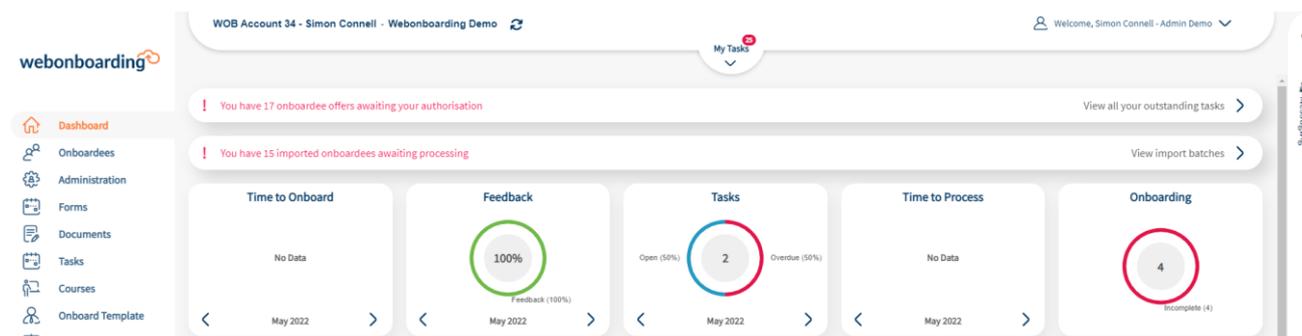
Navigation: Back

You can also navigate to this section by going to Onboardees, then navigating to an Onboardee record > Activity > Tasks. This screen shows all of the Tasks allocated to that Onboardee process, the Type (HR/Manager/Task Manager), if there was a specific person assigned to it, the due date, current status and the remaining days until the due date.

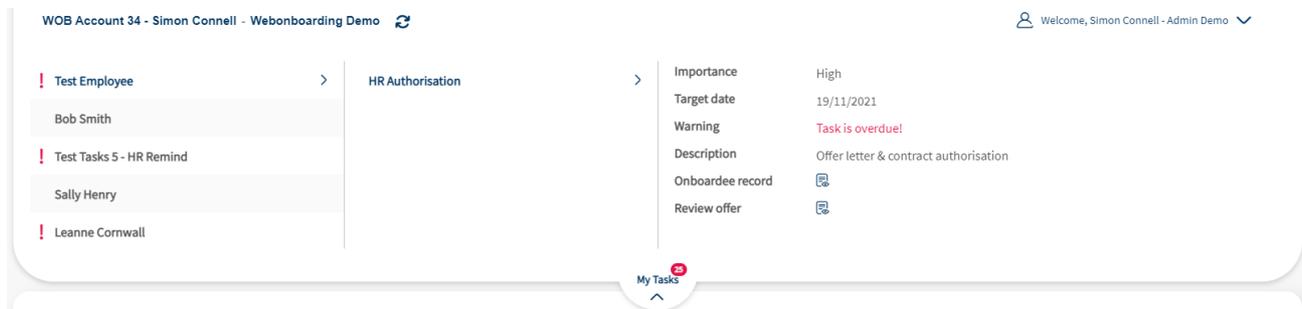
Tasks that are overdue will be shown in red, any that are due in the next 7 days in yellow and all others in the standard text colour.

## Tracking and Completing Your Own Tasks – HR and Manager

If you are a HR Admin or Manager then your tasks will be notified to you by email (unless you have opted out of receipt) and show up in the drop down bar at the top of the screen.



Clicking the arrow on this will open up the list of tasks that you can complete as a user. Some may be assigned to the HR group if you are a HR admin, others might be Manager tasks assigned to you if you have that role. Next to the My Tasks label you will see a number, this is the number of Tasks that you could currently complete. This will be highlighted in red if you have tasks that are overdue.



This section is arranged by Onboardee name in the first column, Task name in the middle column and then the Task details on the right. Depending on the type of Task you will either be able to Complete Task using the button here or Review the Offer if it is a task relating to the offer authorisation process.

## 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.

Task Manager Tasks									
User Assigned									
<input type="checkbox"/>	Task Name ↕	Forename ↕	Surname ↕	Contract Start Date ↕	Task Completion ↕	Company ↕	Status ↕	Action	
<input type="checkbox"/>	Create email account	Daisy	Edinburgh	2022-06-06	5 days remaining	Webonboarding Demo	Incomplete	✓	
Group Assigned									
<input type="checkbox"/>	Task Name ↕	Forename ↕	Surname ↕	Contract Start Date ↕	Task Completion ↕	Company ↕	Group Name ↕	Status ↕	Action
<input type="checkbox"/>	Order IT Equipment	James	Cornwall	2022-05-30	9 days overdue	Webonboarding Demo	DB - IT Processes	Incomplete	✓

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 Onboarder 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.

## Reporting on Tasks

You can also report on Task completion in the Reports section. Navigate to Reports > Task List and complete the Start Dates that you want to report on. This will filter results for the Tasks associated to Onboardees with Start Dates between those dates.

Reports > Task List

Time to Complete   Withdrawals   Feedback   **Task List**   Equal Ops   Emails   Email Opt Outs   Forms   Reading List

Start Date From \* 18/05/2022

Start Date To \* 24/05/2022

Get Report Data

Company	Task Name	Target Date	Completed On	Owner Role	Owner Name	Forename	Surname	Start Date	Comments

Total Items: 0

You can then use this data to determine how many tasks were completed on time or Export the data to using the stack icon  to select the appropriate method.