Dashboard

The Dashboard is where you land in Webonboarding when you first login to the system. It is designed to put information about actions to perform front and centre so that you can access them quickly. This guide will focus on explaining the main areas of the Dashboard.

My Tasks

At the top of the screen you will see the My Tasks dropdown.

This will highlight how many tasks are assigned to you and whether any of those tasks are overdue with a number next to the label. A red highlighted number means that some tsks are outstanding, a green highlight means that no assigned tasks are beyond their target date.

Clicking on the arrow here will bring down the list of tasks assigned to you.
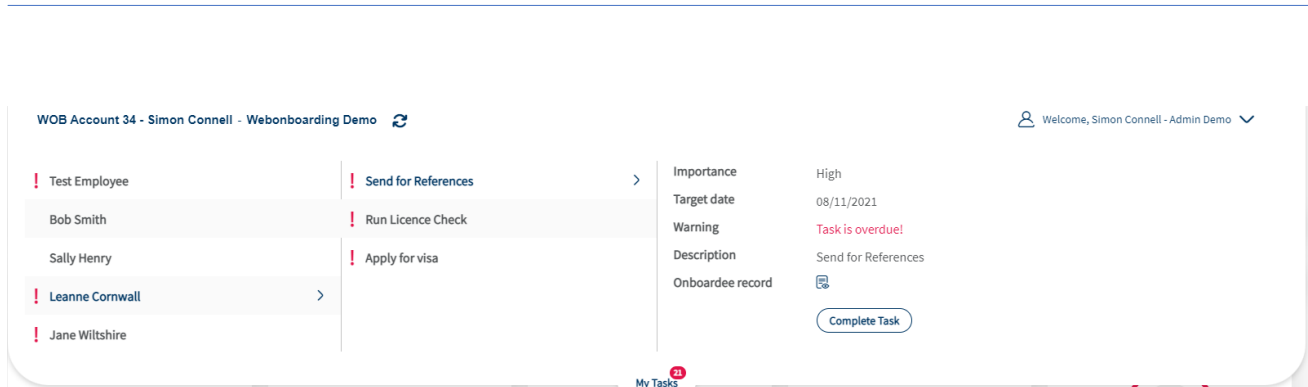
On the left is a list of Onboardees, in the next column is the list of tasks relating to the selected Onboardee and on the right are the details of the selected task.

Field	Description
Importance	The assigned importance of the Task
Target Date	The expected completion date for this Task
Warning	Shown if the Task is overdue
Description	The description assigned to the Task
Onboardee Record	Click the icon here to access the record of the Onboardee for required details
Review Offer (Only for Authorisation tasks)	Click the icon here to access the Offer Review section for this Onboardee
Complete Task (Only for general HR and Manager Tasks)	Click here to mark this Task complete for this Onboardee

Authorisation

This section will only be visible if there are offers awaiting authorisation. It will show you how many are awaiting authorisation and clicking on 'View all your outstanding tasks' will take you to a list of all offers that need reviewing.

Imports

This section will only be visible if there are candidates in import batches that have yet to be fully created as Onboardees in Webonboarding. It will show you how many are awaiting import and clicking on 'View import batches' will take you to the Imports section of Bulk Operations to process them.

> ! You have 54 imported onboardees awaiting processing   View import batches ⟩

Dashlet Charts

Across the top of the screen you will see several charts showing various statistics about your onboarding processes. These default to the current month but you can use the < and > arrows to move to different months.
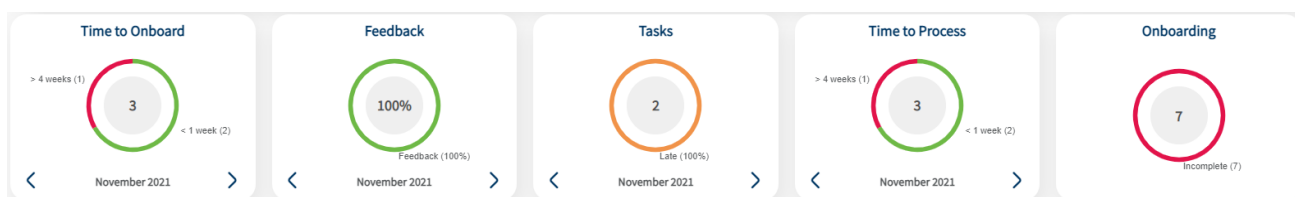

Chart	Description
Time to Onboard	Looks at the time from offer being sent to a completed Onboardee's start date and shows the number of processes that took either > 1 week, 1 – 4 weeks, or > 4 weeks. Also displays the number of Onboardees included in the calculation
Feedback	Shows the % of positive feedback submitted by Onboardees in this month
Tasks	Shows the % of tasks that are overdue, completed late or completed on time with the number of tasks in the calculation also displayed
Time to Process	Looks at the time from offer being sent to an Onboardee or HR user marking the process Complete and shows the number of processes that took either > 1 week, 1 – 4 weeks, or > 4 weeks. Also displays the number of Onboardees included in the calculation
Onboarding	Shows the number of Incomplete and Complete Onboardee processes in this month.

Onboarding Progress

This section is designed to highlight Onboardees that you might need to take actions for. The list shows onboardees that have outstanding steps and/or have internal tasks that are yet to be completed.

Onboarding progress

	Forename ⬍	Surname ⬍	Company ⬍	Progress indicator dots	Pending Tasks	Start Date ⬍	Days remaining
!	Andy	London	Webonboarding Demo	● ○ ○ ○ ○ ○ ○	3	03/01/2023	-1
!	Simon	Connell	Webonboarding Demo	● ○ ○ ○ ○ ○ ○	2	09/01/2023	5
	Bob	Smith	Webonboarding Demo	● ○ ○ ○ ○	0	16/01/2023	12
	Jen	York	Webonboarding Demo	● ● ○ ○ ○ ○ ○ ○	2	23/01/2023	19

5 ⌄ records per page   4 records

It shows the name of the Onboardee, the Company they are joining, a progress indicator, the number of tasks not yet complete, their start date and the days remaining until their start date. It highlights in red Onboardees that are beyond their start date with outstanding steps or tasks, and in yellow those that have less than a week until they start with the same criteria. Clicking on the Onboardee in the table will take you to the Tasks section of the Onboardee Activity.

Pending Authorisations

This section is designed to highlight Onboardees that have been created but not yet authorised. The list shows Onboardees that have outstanding authorisation processes.

Pending authorisations

	Forename ⬍	Surname ⬍	Company ⬍	Progress indicator dots	Start Date ⬍	Days remaining
!	Phil	Brookes	Webonboarding Demo	● ○ ○ ○ ○	03/01/2023	-1
!	James	Scotland	Webonboarding Demo	● ● ○ ○ ○	09/01/2023	5
	Shayna	Lancashire	Webonboarding Demo	● ● ○ ○ ○	16/01/2023	12
	Simon	Cornwall	Webonboarding Demo	● ● ○ ○ ○	23/01/2023	19
	Jane	Cornwall	Webonboarding Demo	● ● ○ ○ ○	30/01/2023	26

5 ⌄ records per page   5 records

It shows the name of the Onboardee, the Company they are joining, a progress indicator, their start date and the days remaining until their start date. It highlights in red Onboardees that are beyond their start date and in yellow those that have less than a week until they start with outstanding authorisations. Clicking on the Onboardee in the table will take you to the Review Offer section section for that Onboardee.