User guide
Talent Onboarding Version 2

HR MANAGER
TALENT SOLUTIONS

Customer version - January-2020

OVERVIEW

- What is Talent Onboarding?
- Talent Onboarding Version 1 → Version 2
- Set up Onboarding
- Roles
- Administration
- Languages
- Process templates
- Employee portal
- Start an onboarding process
    - Integrated solution
    - Stand alone solution
- Processes overview & details
- Invite employee to the employee portal
- Emails & reminders

What is Talent Onboarding?

Talent Onboarding helps companies make professional, effective and time saving onboarding processes. It is one product, containing two modules:
Process module and Employee portal.

Process module:

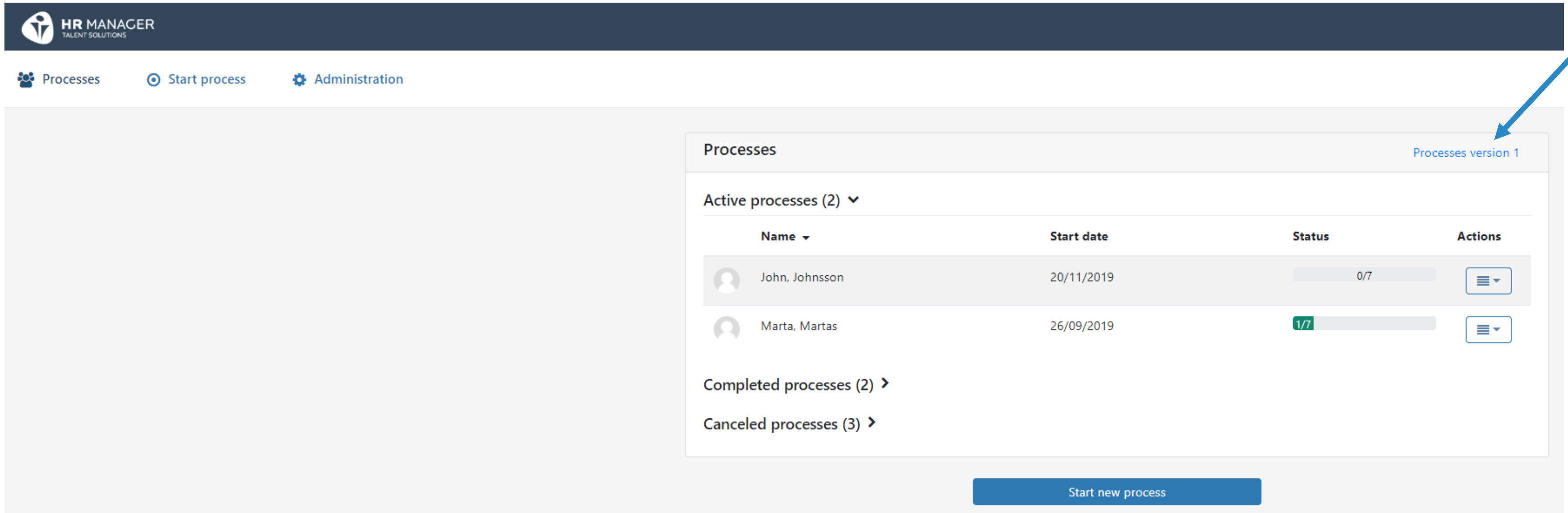
- Create processes with tasks to be executed for new employees.
- Reminders is automatically sent to task assignees and process owners.
- Task assignee can be anyone with a mailadress. (Don’t need user access in the system).

Employee portal

- Communicate and inform the new employees through documents, links, and video’s.
- Fetch information.
- Send instant messages.
- Get verifications.

TALENT ONBOARDING VERSION 1 → VERSION 2

Customers that previously used TO version 1 can still handle their old processes via a link from TO version 2.


HR MANAGER
TALENT SOLUTIONS
Processes
Start process
Administration

Processes

Processes version 1

Active processes (2)

	Name	Start date	Status	Actions
	John, Johnsson	20/11/2019	0/7	≡
	Marta, Martas	26/09/2019	1/7	≡

Completed processes (2)

Canceled processes (3)

Start new process

What to keep in mind if you have used version 1 before:

- Your employee portal and branding will be kept in Onboarding version 2.
- You need to create new process templates, including new tasks.

PLEASE NOTE: There is no task archive in version 2.
If you want to reuse tasks for several templates, it’s best to copy a template and edit the tasks in the copy.

SET UP ONBOARDING

Before starting the onboarding process you need to:

- Create an onboarding process template with tasks.
- Create an employee portal, that the new employee can be invited to.

ROLES

Users

ROLES

There are two user roles in Talent Onboarding:

- User: Have access to all functions but Administration menu.
  - Users can select between all process templates when starting a process.
  - Users can only see their own processes.
  - Users can only see portals for their own processes.

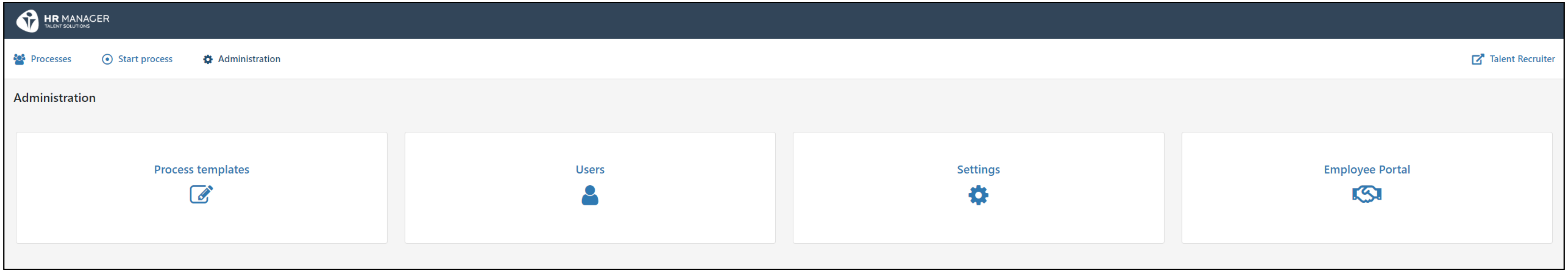
- Administrator: Have access to all functions including Administration menu.
  - Administrators can select between all process templates when starting a process.
  - Administrators can see all processes, included portals.
  - Administrators can see all process- and portal templates.

PLEASE NOTE: Task assignee does **not** need user access to Talent Onboarding. Task assignee can be anyone with an email address.

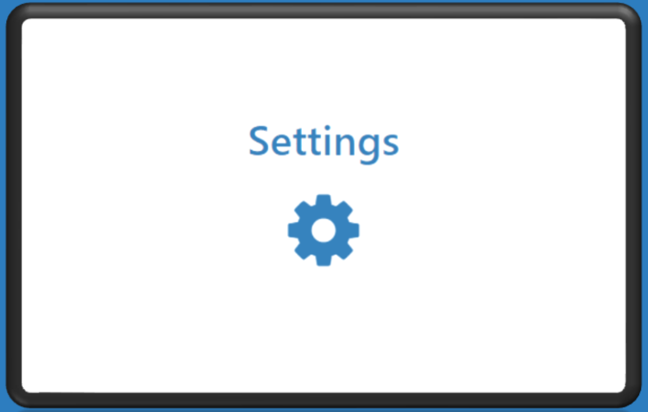
ADMINISTRATION

As an administrator, you can:

1. Create processes with unlimited number of tasks in **Process templates.**
2. Register users and roles in **Users.**
3. Set system e-mail language in **Settings.**
4. Create portals in **Employee portal.**
5. If you also are using Talent Recruiter, there is a shortcut to go back to Talent Recruiter.


HR MANAGER
TALENT SOLUTIONS
Processes
Start process
Administration
Talent Recruiter
Administration
Process templates
Users
Settings
Employee Portal

LANGUAGES



Settings

LANGUAGES

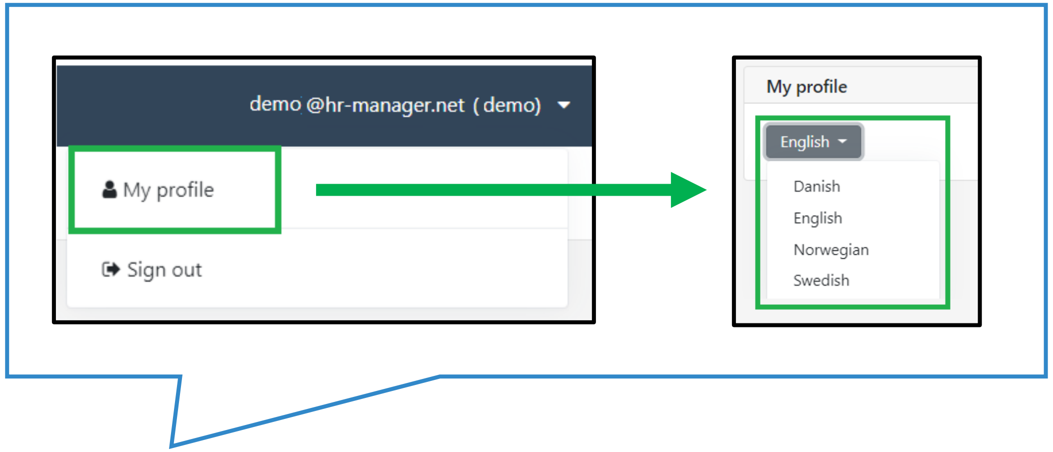
Languages available: Danish, English, Norwegian, Swedish.

- **One common system language for text in *task related* e-mails can be selected per solution.** Multi language customers must agree on which system language to use.

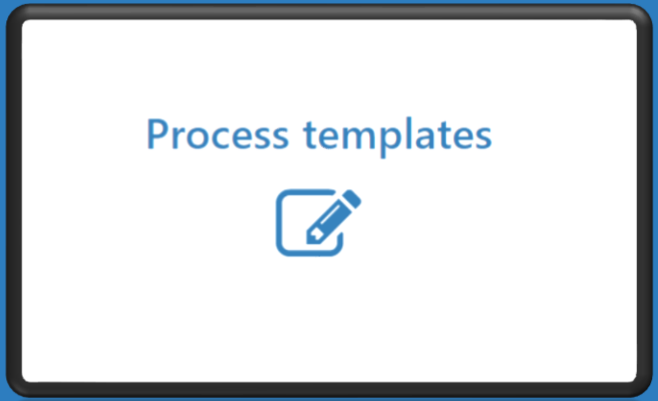
- Language in the portal invitation email, can be adjusted when inviting employee.

- **Processes can be created in any language.**

- **Users & Task assignees** can individually select their own user system language in My profile. If nothing is selected, the user language will be the same as the system language.

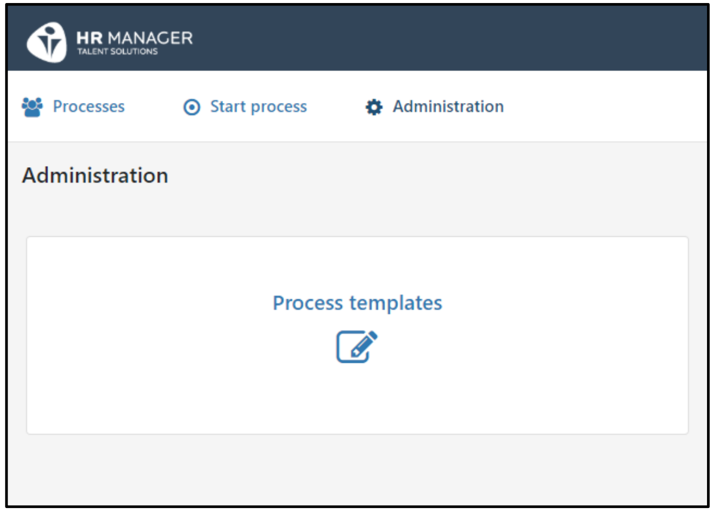

demo @hr-manager.net (demo)
My profile
Sign out
My profile
English
Danish
English
Norwegian
Swedish

PROCESS TEMPLATES


Process templates

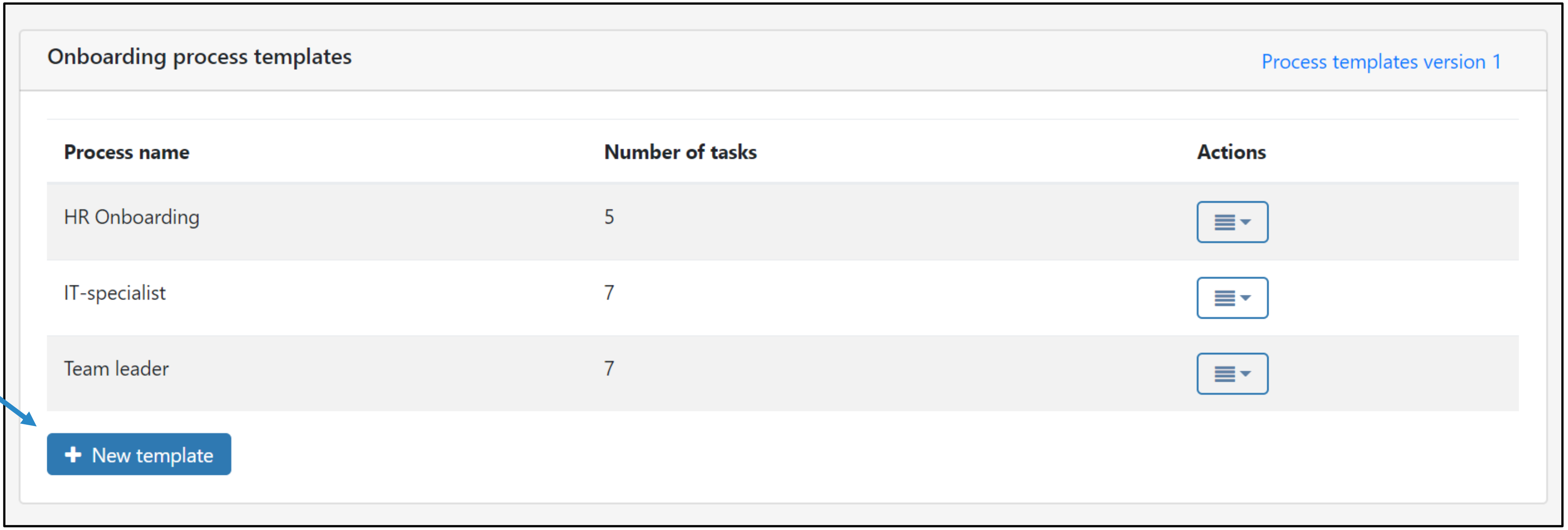
CREATE NEW PROCESS TEMPLATE

A new process template is created via:
Administration → Process templates


HR MANAGER
TALENT SOLUTIONS
Processes
Start process
Administration

Administration

Process templates

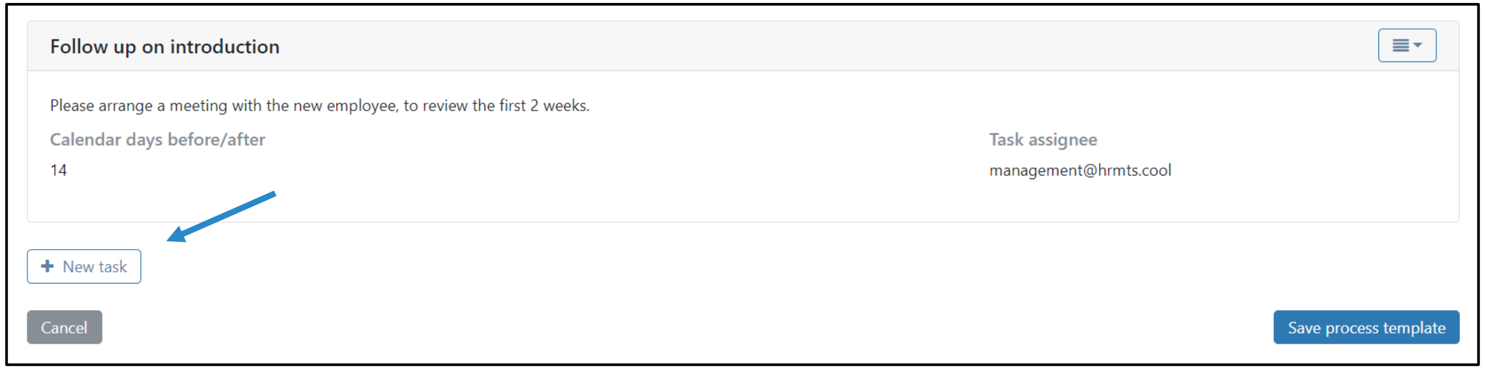

Process templates version 1

Onboarding process templates

Process name	Number of tasks	Actions
HR Onboarding	5	≡ ▾
IT-specialist	7	≡ ▾
Team leader	7	≡ ▾

+ New template

CREATE NEW PROCESS TEMPLATE



Follow up on introduction

Please arrange a meeting with the new employee, to review the first 2 weeks.

Calendar days before/after: 14

Task assignee: management@hrmts.cool

PROCESS TEMPLATE

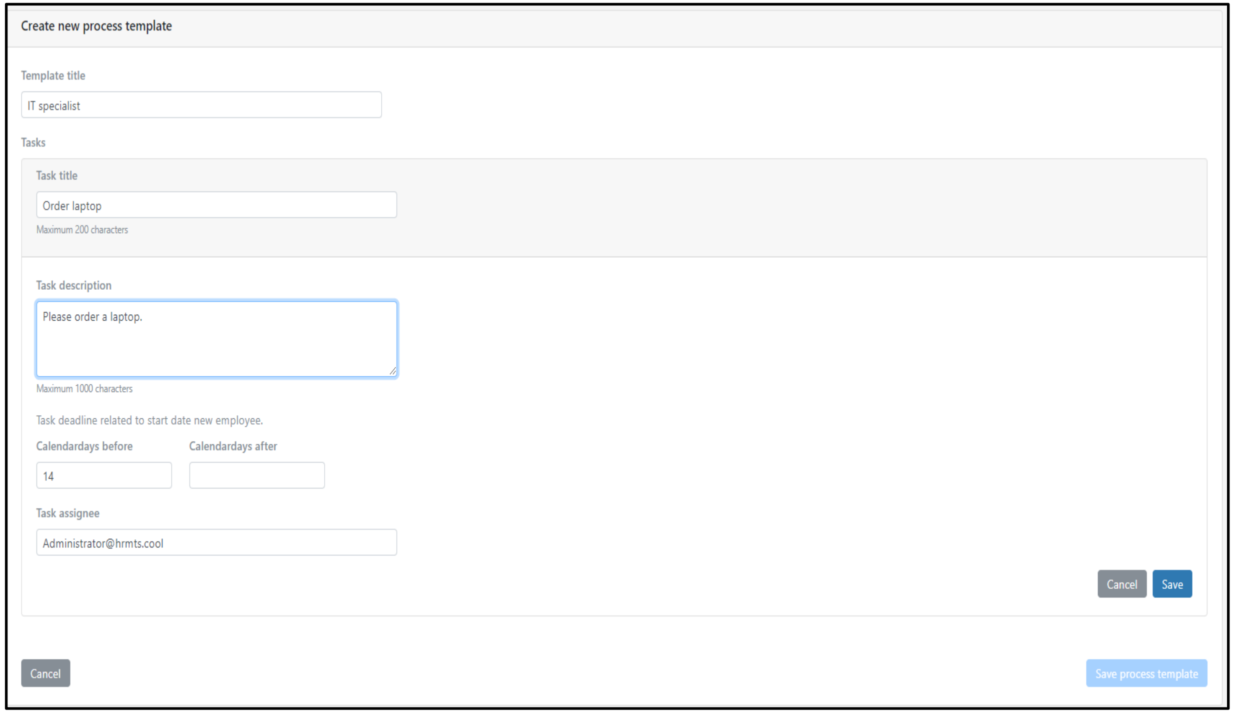
1. Give the process a name that makes it easy for user to pick the right one.
2. Press «New task» to add tasks to the process.

TASKS

1. Add a task to the process, including a task description, task deadline and task assignee.
    - **Task description**: In this field you may add details about the task. You can also add links to documents or websites in the tasks. When the task assignee clicks on the link, it will open in a new tab.
    - **Task deadline**: Select a deadline for the task by entering amount of **calendar days** before or after the employee start date. **Please note that weekends and holidays are included**.

      When you start the onboarding process for an employee, the task due date will automatically be calculated by the system, based on employee start date.
    - **Task assignee**: Add task assignee to each task, if applicable, it’s not mandatory. If you don’t write anything in this field, you will type it in when starting the process instead.

2. Save the task and press «New task» if you want to add more tasks.



Create new process template

Template title: IT specialist

Tasks

Task title: Order laptop

Maximum 200 characters

Task description: Please order a laptop.

Maximum 1000 characters

Task deadline related to start date new employee.

Calendardays before: 14

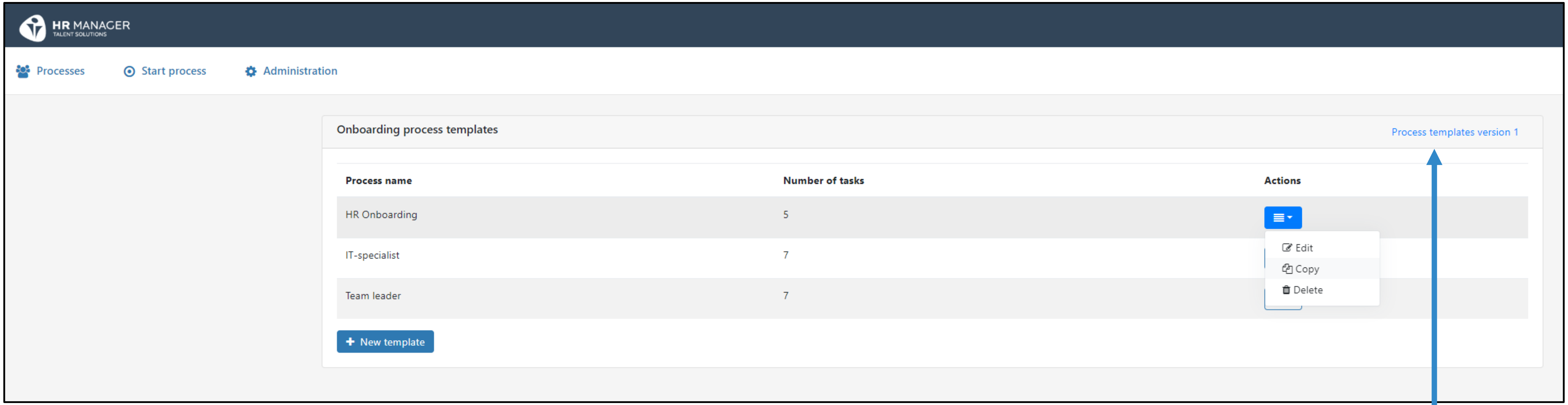
Calendardays after:

Task assignee: Administrator@hrmts.cool

When all tasks have been created, finish by saving the process template. All changes are also auto saved.

PROCESS TEMPLATES

After saving the process template, you will see it in the overview of process templates.


HR MANAGER
TALENT SOLUTIONS
Processes
Start process
Administration
Edit
Copy
Delete
New template

Onboarding process templates

Process templates version 1

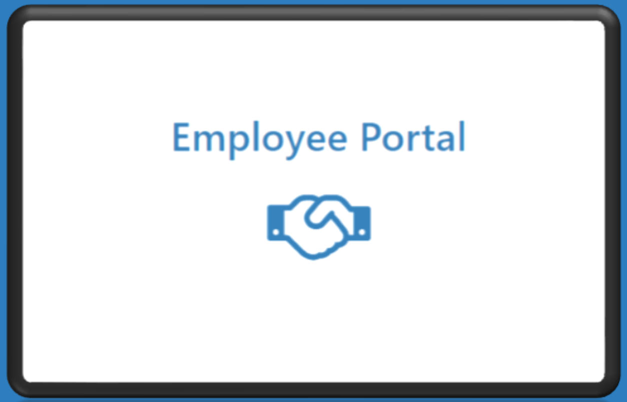
Process name	Number of tasks	Actions
HR Onboarding	5	
IT-specialist	7	
Team leader	7	

If you want to make a similar process later and reuse tasks, you can **copy** the process template. You can easily *edit the tasks* in the copy, which will help you get a new process template, without having to rewrite all the tasks.

If you want to copy data from your processes in version 1, you can access version 1 by clicking here.

PLEASE NOTE: A process template that is deleted or changed will only affect future processes.

EMPLOYEE PORTAL



Employee Portal

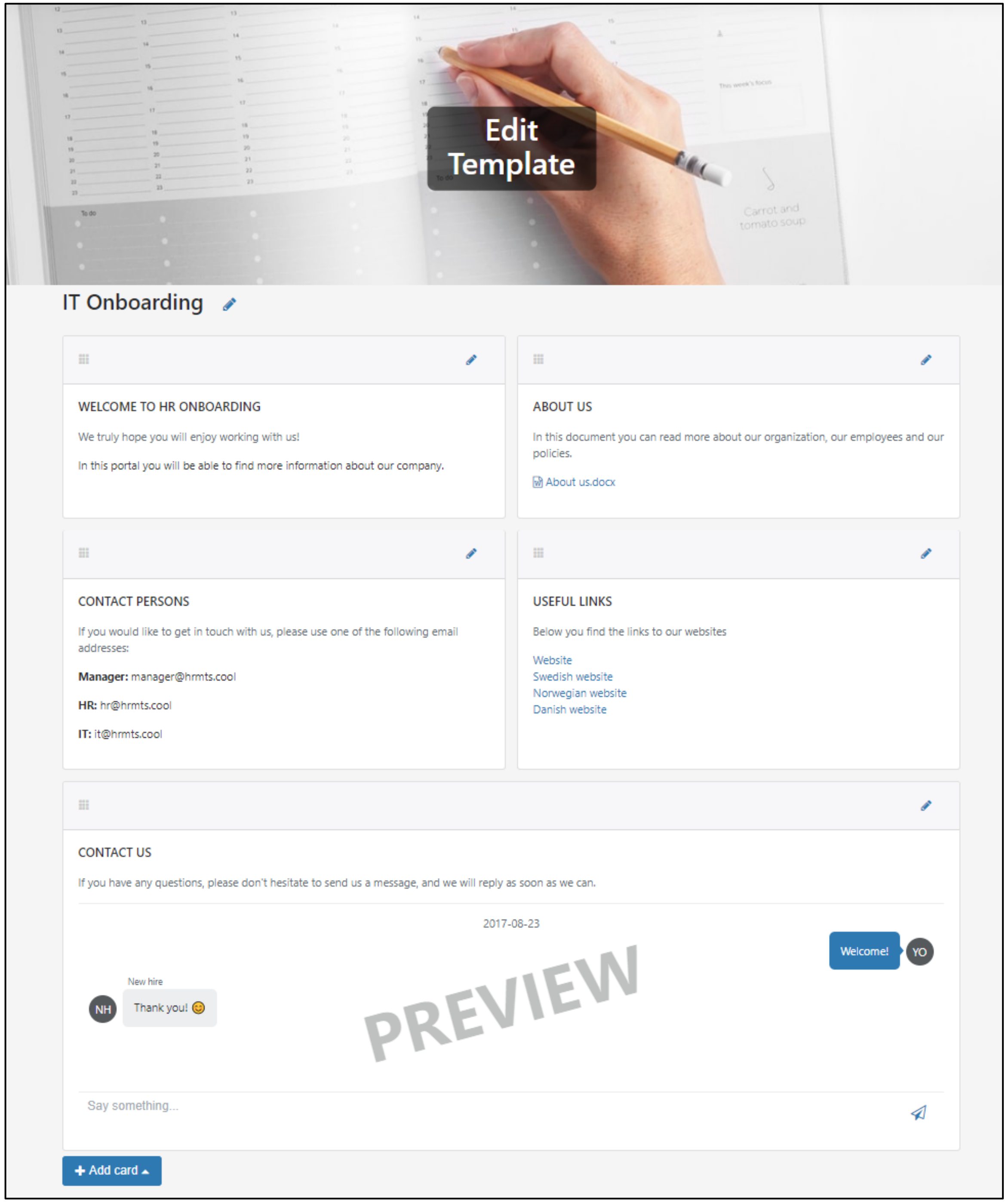
CREATE EMPLOYEE PORTAL

1. Make sure you have all information needed to create the portal.

2. Give the portal a name that makes it easy for user to pick the right one.

3. Build the portal using the available cards. The number of portals and cards are unlimited. Except for the Chat card.

PLEASE NOTE: All portal templates are available for the administrator role. Including templates made by other administrators.



IT Onboarding

WELCOME TO HR ONBOARDING

We truly hope you will enjoy working with us!

In this portal you will be able to find more information about our company.

ABOUT US

In this document you can read more about our organization, our employees and our policies.

About us.docx

CONTACT PERSONS

If you would like to get in touch with us, please use one of the following email addresses:

Manager: manager@hrmts.cool

HR: hr@hrmts.cool

IT: it@hrmts.cool

USEFUL LINKS

Below you find the links to our websites

Website
Swedish website
Norwegian website
Danish website

CONTACT US

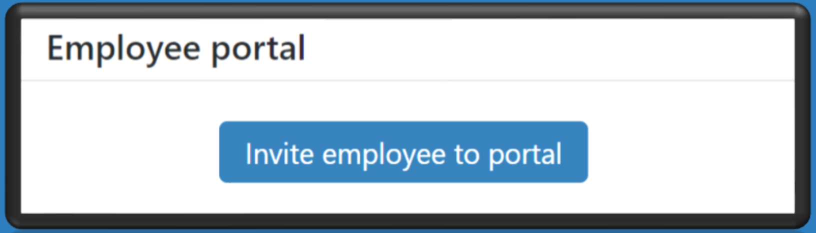
If you have any questions, please don't hesitate to send us a message, and we will reply as soon as we can.

2017-08-23

Welcome! YO

New hire
NH Thank you! 😊

INVITE AND VIEW EMPLOYEE PORTAL



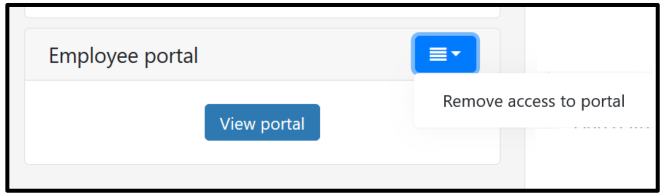
Employee portal

Invite employee to portal

VIEW AN EMPLOYEE’S PORTAL

Via Processes → Edit process, you can:

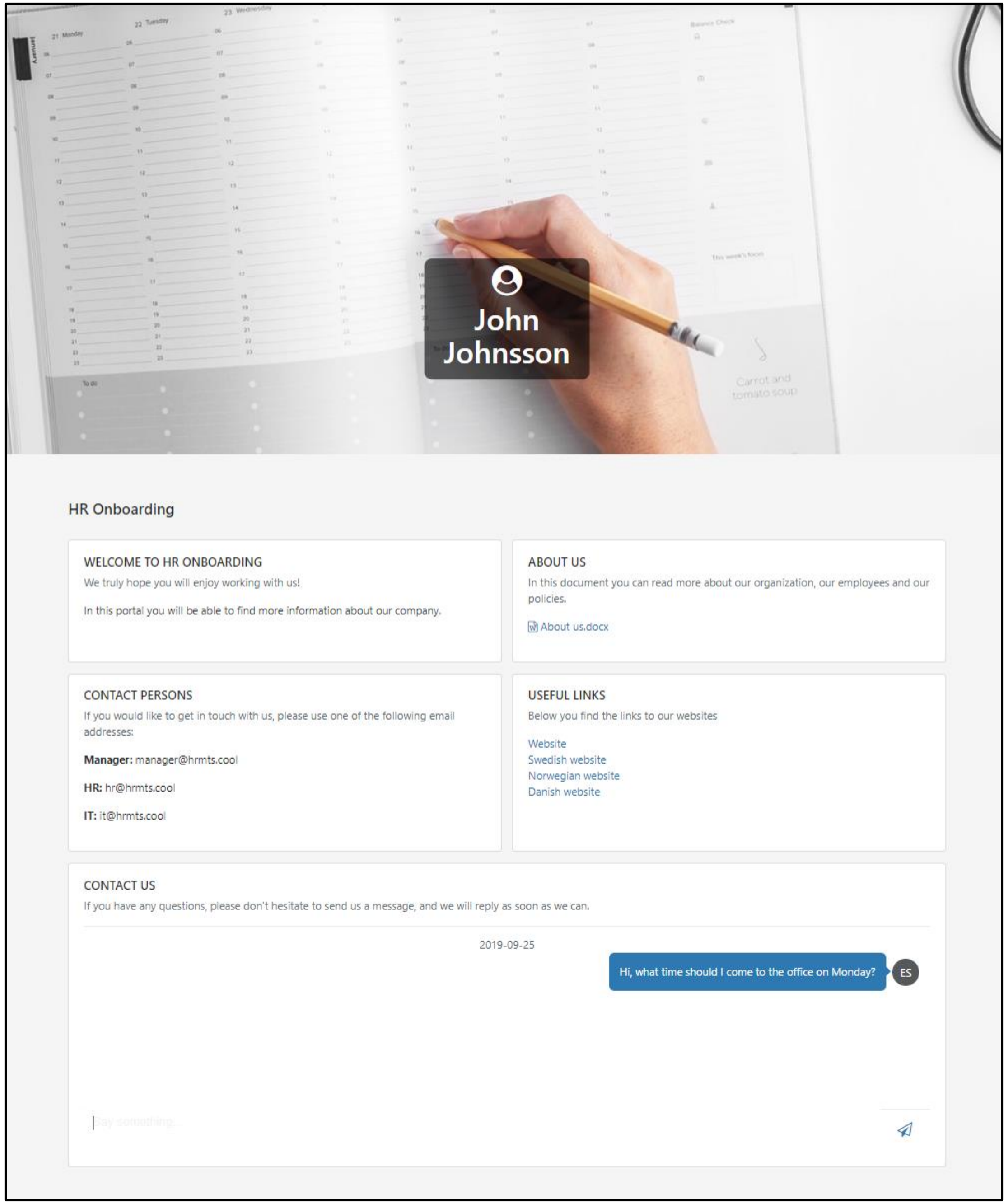
- Invite to, or view the employee portal
- Remove employee’s access to portal, by clicking the menu on the right.



Viewing the portal allows you to:

- Check if employee has responded to questions.
- Check if employee has left a message.

PLEASE NOTE: The *process owner*, that started the onboarding process, will get an email if the employee has replied to a chat and vice versa.



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HR: hr@hrmts.cool

IT: it@hrmts.cool

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Norwegian website
Danish website

CONTACT US

If you have any questions, please don't hesitate to send us a message, and we will reply as soon as we can.

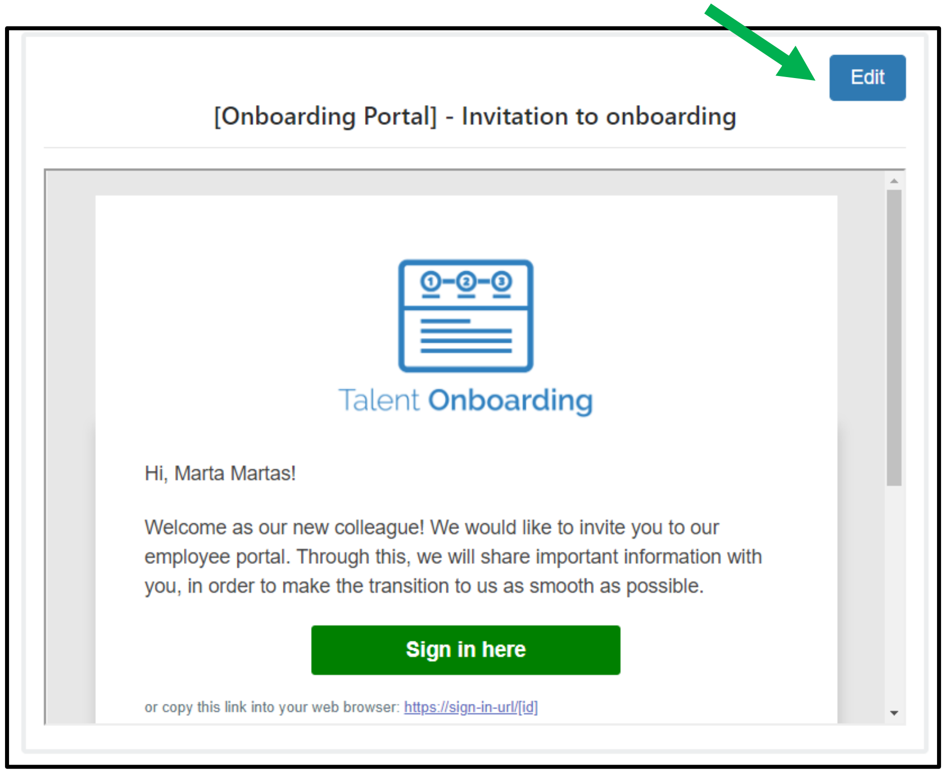
2019-09-25

Hi, what time should I come to the office on Monday?

ES

PORTAL INVITATION TO NEW EMPLOYEES

When inviting employees to the portal, you can edit the e-mail text prior to sending:



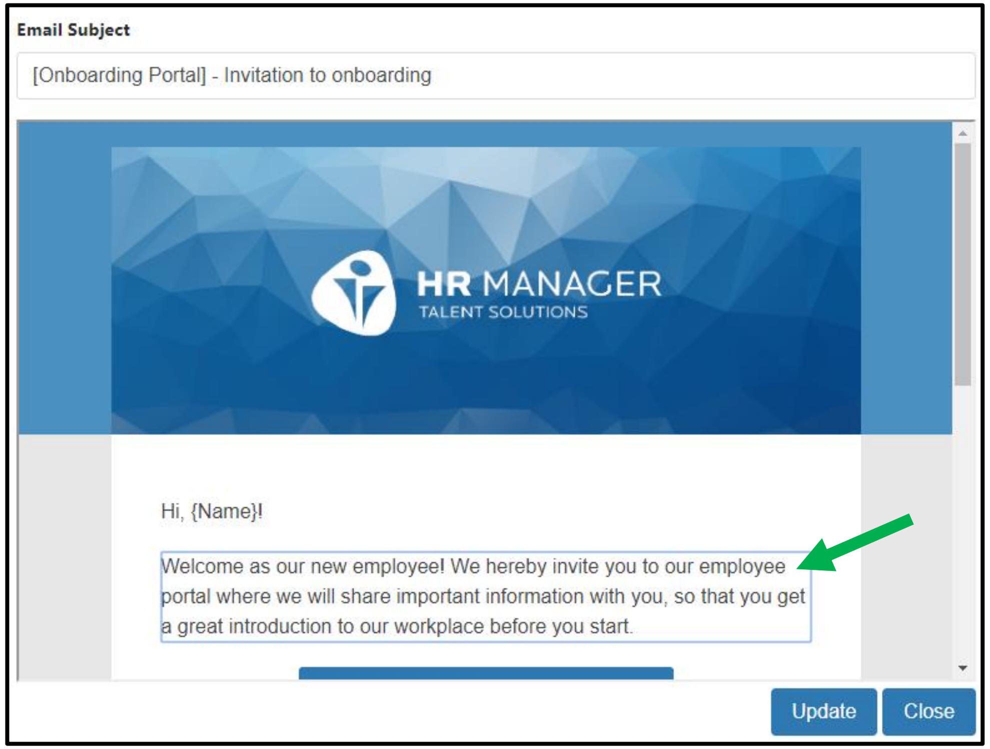
[Onboarding Portal] - Invitation to onboarding

Hi, Marta Martas!

Welcome as our new colleague! We would like to invite you to our employee portal. Through this, we will share important information with you, in order to make the transition to us as smooth as possible.

or copy this link into your web browser: https://sign-in-url/[id]

Press edit to adjust the text.



Email Subject

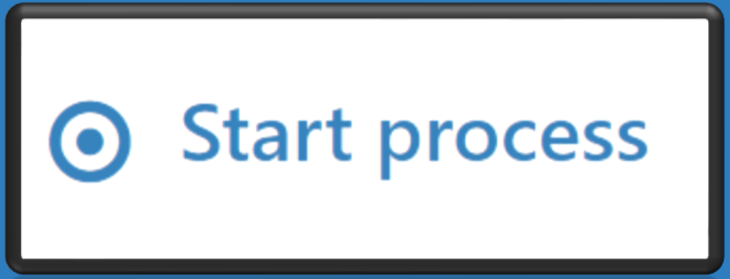
[Onboarding Portal] - Invitation to onboarding

Hi, {Name}!

Welcome as our new employee! We hereby invite you to our employee portal where we will share important information with you, so that you get a great introduction to our workplace before you start.

Click on the text you wish to edit.

START AN ONBOARDING PROCESS


◎ Start process

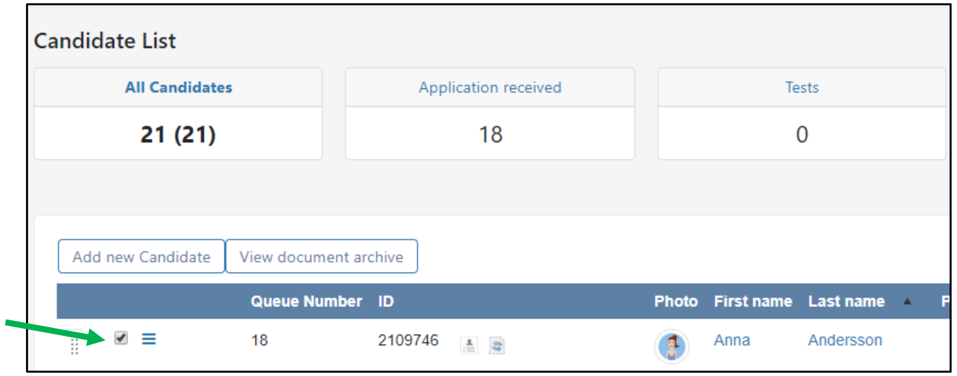
START PROCESS: Integrated solution

Select the candidate from the candidate list in the recruitment system.
The user that transfers the candidate is regarded as the **process owner.**

PLEASE NOTE: The user that transfer the candidate must be registered as user in Talent Onboarding, before doing the transfer.

Information will be prefilled in the *Start process* screen.
Select **Employee start date** and **Onboarding process**.

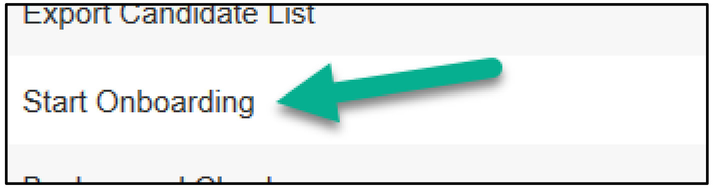
Recruitment system:

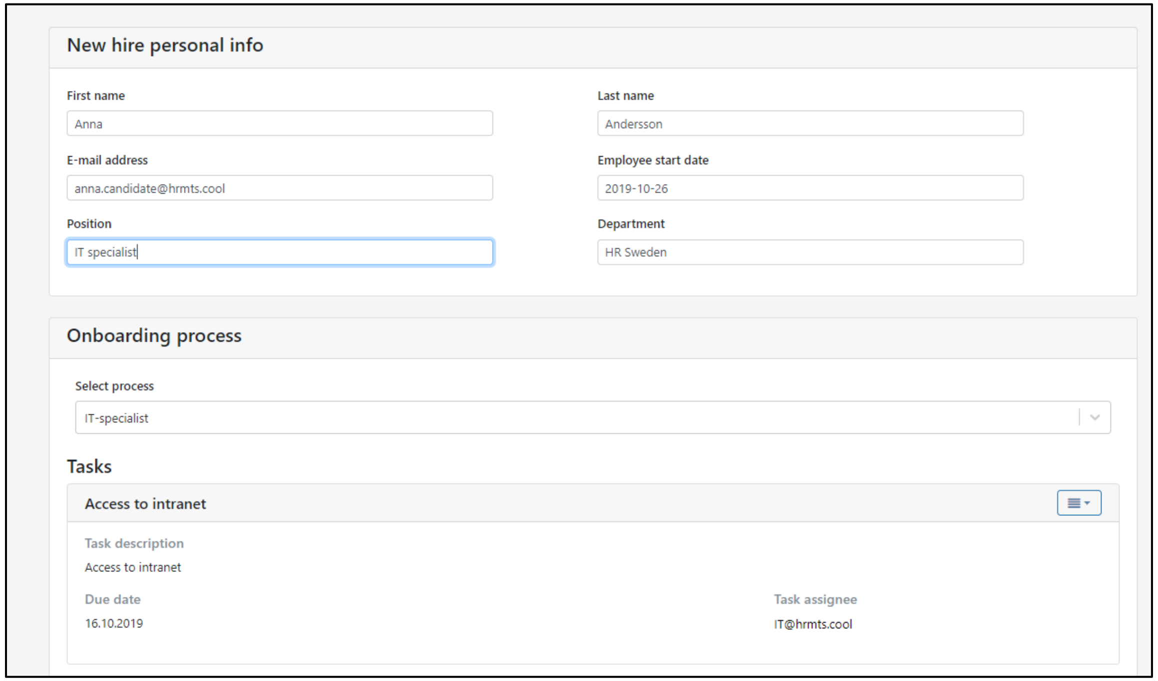


Candidate List

All Candidates	Application received	Tests
21 (21)	18	0

	Queue Number	ID	Photo	First name	Last name
☑	18	2109746		Anna	Andersson





New hire personal info

First name: Anna
Last name: Andersson
E-mail address: anna.candidate@hrmts.cool
Employee start date: 2019-10-26
Position: IT specialist
Department: HR Sweden

Onboarding process

Select process: IT-specialist

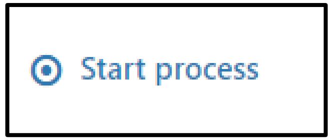
Tasks

Access to intranet

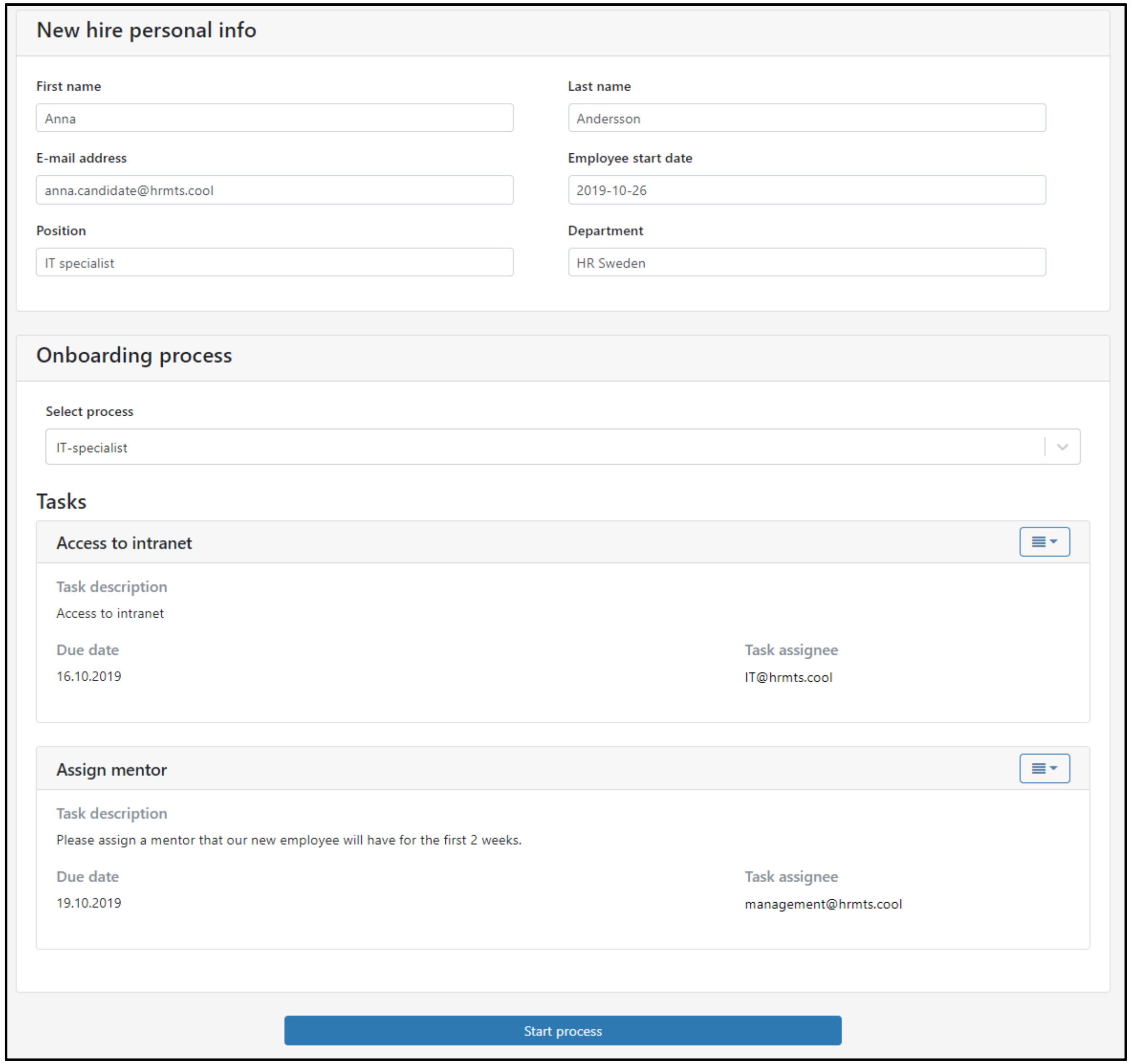
Task description: Access to intranet
Due date: 16.10.2019
Task assignee: IT@hrmts.cool

START PROCESS: Stand alone solution

Log into Talent Onboarding via:
https://onboarding.hrmts.net/



- **Fill in employee information**
- **Fill in employee start date.**
- **Position and department is not mandatory.**
- **Select and start process.**
  The person who starts the process is regarded as the **process owner**.



New hire personal info

First name: Anna	Last name: Andersson
E-mail address: anna.candidate@hrmts.cool	Employee start date: 2019-10-26
Position: IT specialist	Department: HR Sweden

Onboarding process

Select process: IT-specialist

Tasks

Access to intranet

Task description: Access to intranet

Due date: 16.10.2019

Task assignee: IT@hrmts.cool

Assign mentor

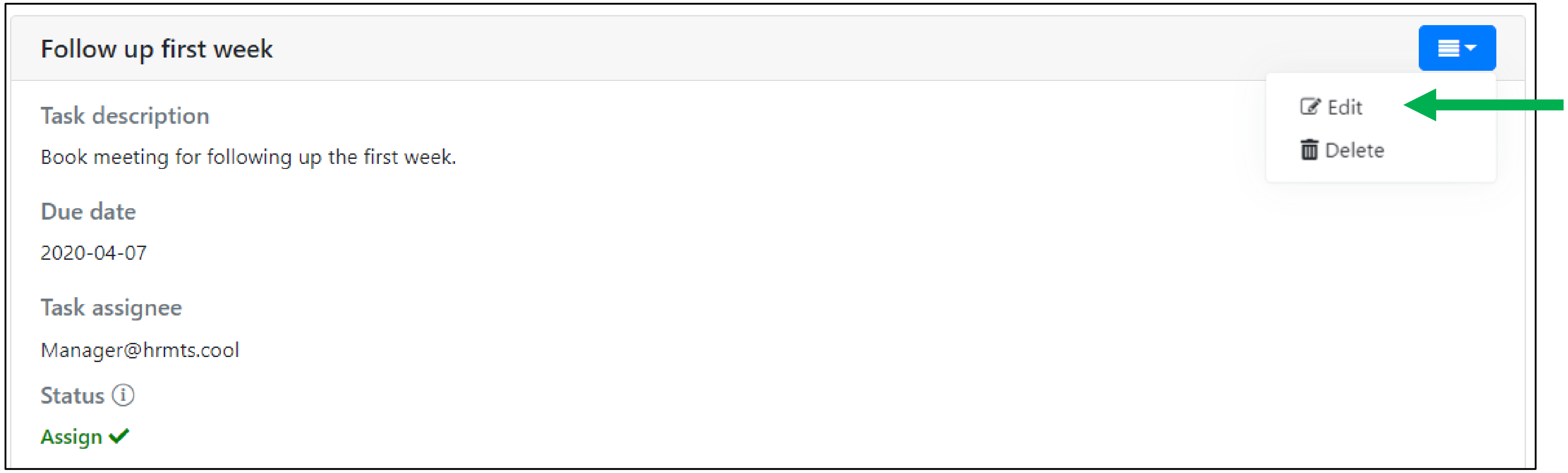
Task description: Please assign a mentor that our new employee will have for the first 2 weeks.

Due date: 19.10.2019

Task assignee: management@hrmts.cool

START PROCESS: Task by task

In **Start process** screen all tasks are marked with **Assign**, which means they will be assigned when process is started.



Follow up first week

Task description

Book meeting for following up the first week.

Due date

2020-04-07

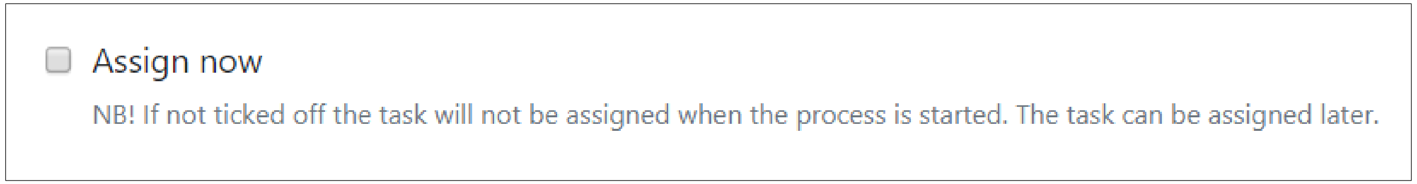
Task assignee

Manager@hrmts.cool

Status ⓘ

Assign ✓

1. To assign tasks *later* in process, press **Edit** to remove immediate assignment.

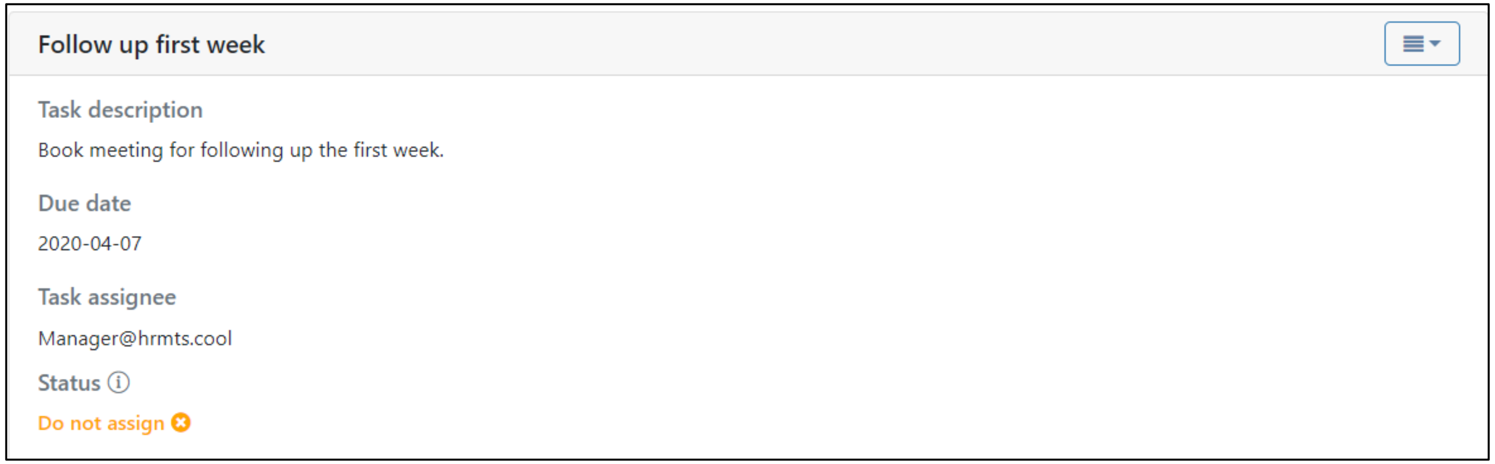


☐ Assign now

NB! If not ticked off the task will not be assigned when the process is started. The task can be assigned later.

2. Remove check mark for **Assign now** and save.

3. Status for the task will change to **Do not assign**



Follow up first week

Task description

Book meeting for following up the first week.

Due date

2020-04-07

Task assignee

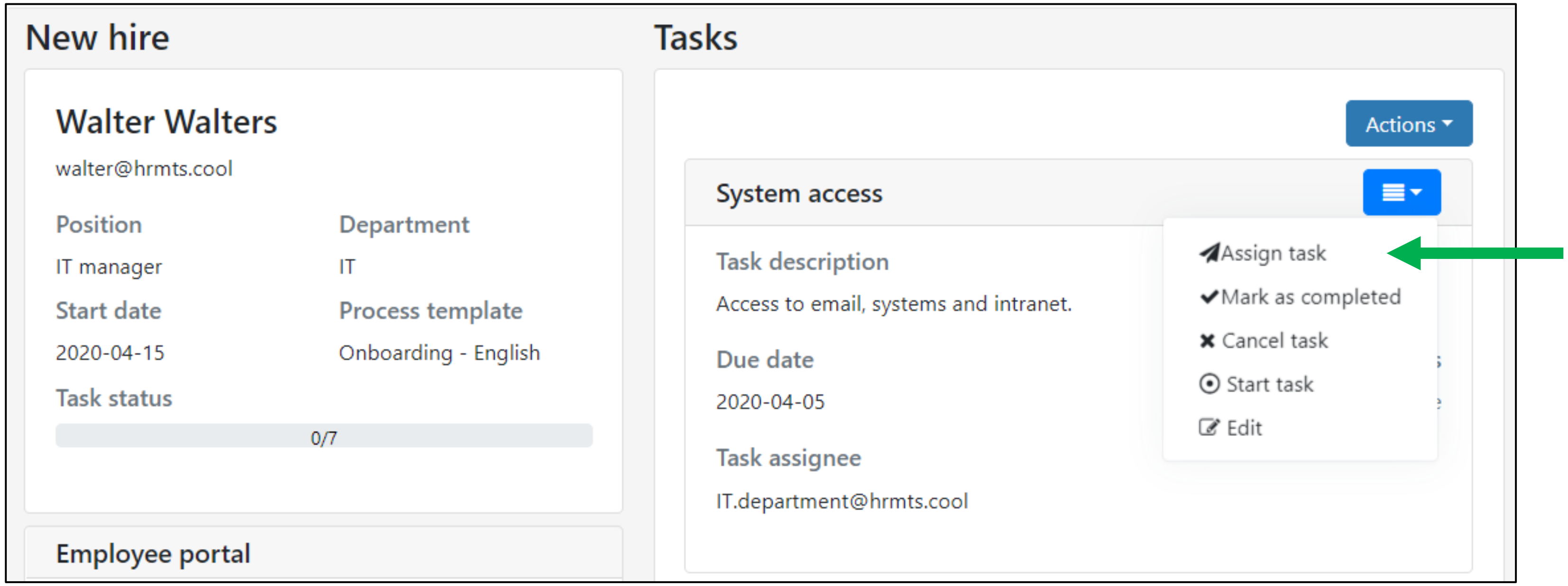
Manager@hrmts.cool

Status ⓘ

Do not assign ⊗

ASSIGNING TASKS DURING PROCESS

If there are tasks that didn't get assigned when *starting* the process, they can be assigned *during* the process in **two ways,** via *Process details*:



New hire

Walter Walters

walter@hrmts.cool

Position: IT manager

Department: IT

Start date: 2020-04-15

Process template: Onboarding - English

Task status: 0/7

Employee portal

Tasks

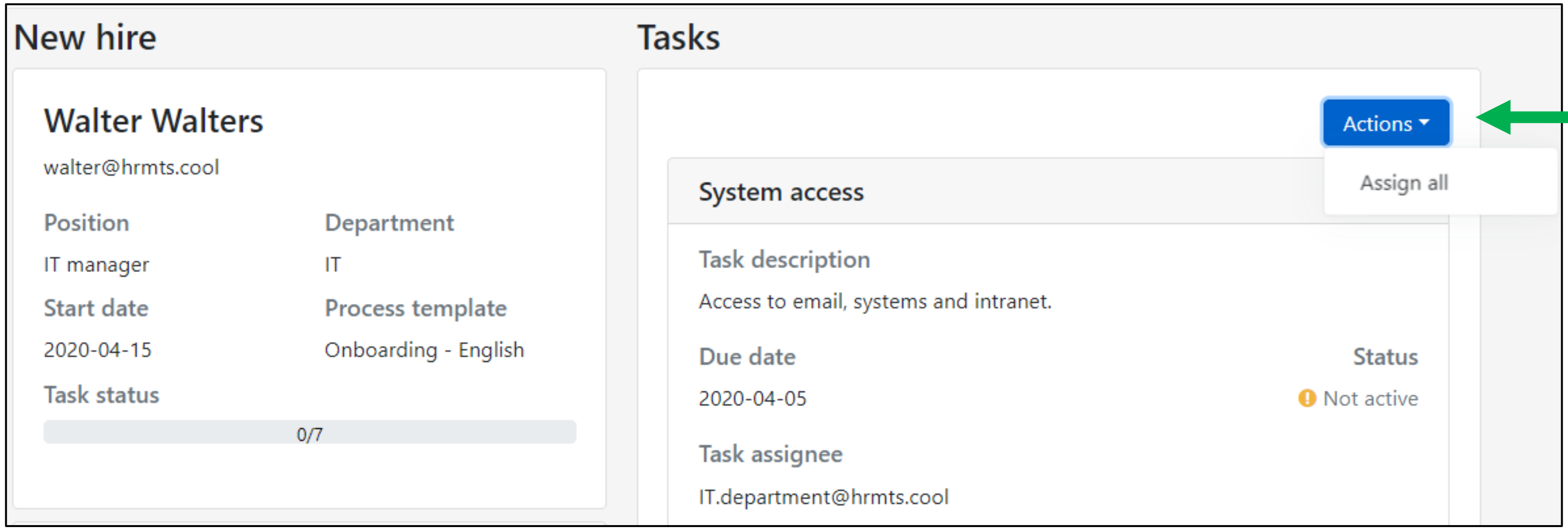
System access

Task description: Access to email, systems and intranet.

Due date: 2020-04-05

Task assignee: IT.department@hrmts.cool

1. **Individually**, by clicking the *menu* for the task, and selecting **Assign task**



New hire

Walter Walters

walter@hrmts.cool

Position: IT manager

Department: IT

Start date: 2020-04-15

Process template: Onboarding - English

Task status: 0/7

Tasks

System access

Task description: Access to email, systems and intranet.

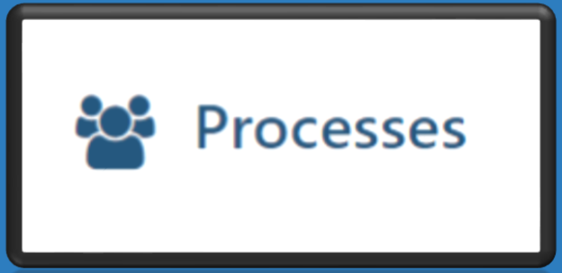
Due date: 2020-04-05

Status: Not active

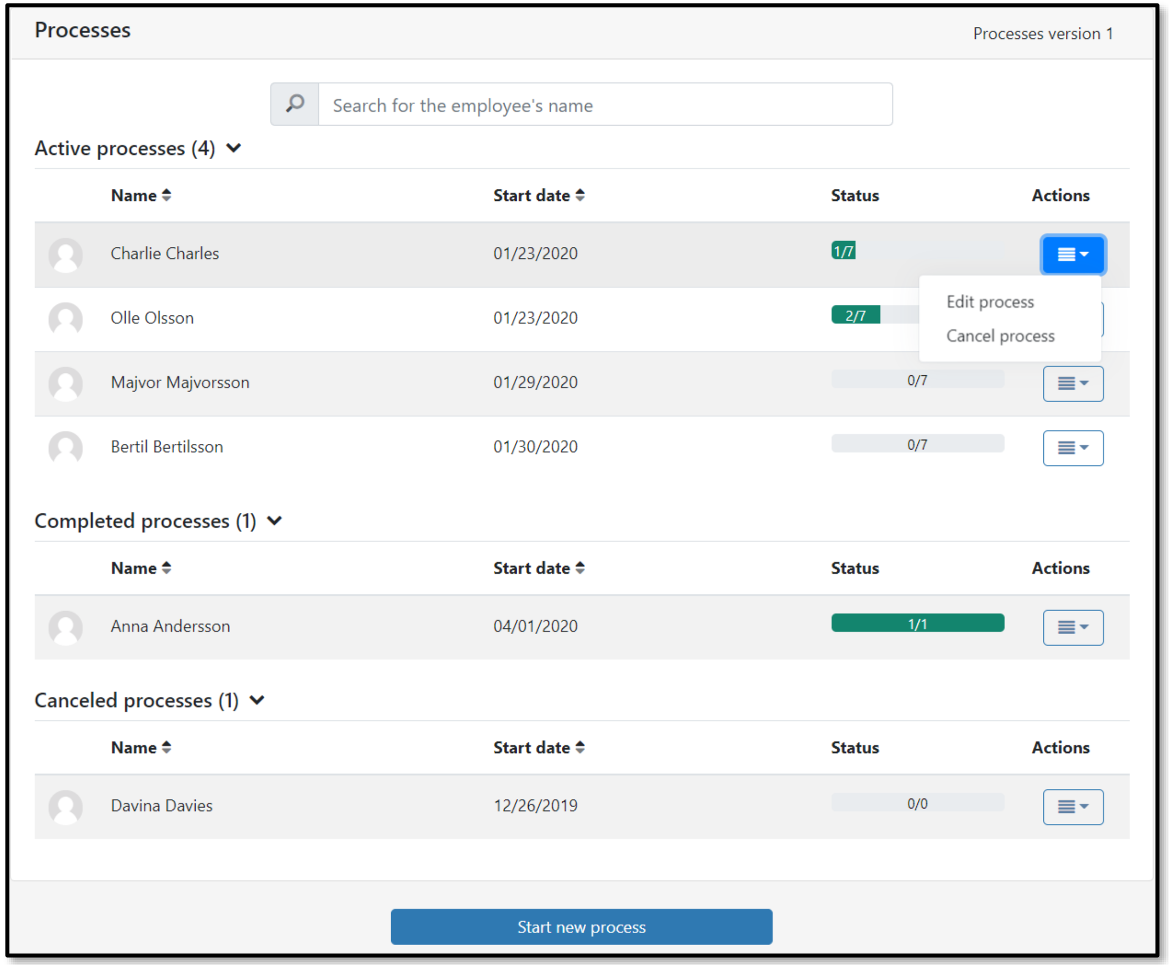
Task assignee: IT.department@hrmts.cool

2. **Simultaneously,** by clicking *Actions* in the top of the screen, and selecting **Assign all**

PROCESS OVERVIEW & DETAILS



PROCESSES OVERVIEW



Active processes (4)

Name	Start date	Status	Actions
Charlie Charles	01/23/2020	1/7	
Olle Olsson	01/23/2020	2/7	
Majvor Majvorsson	01/29/2020	0/7	
Bertil Bertilsson	01/30/2020	0/7	

Completed processes (1)

Name	Start date	Status	Actions
Anna Andersson	04/01/2020	1/1	

Canceled processes (1)

Name	Start date	Status	Actions
Davina Davies	12/26/2019	0/0	

In the processes overview you will see all your active, completed and cancelled processes.

You can search for employee name in the search field on top. Search is done in all processes simultaneously, including cancelled and completed processes.

Via *Edit process,* you will get to the process details screen. There you will be able to view the details of your process, edit tasks and invite the employee to the portal.

- Once all tasks in the process are completed, the process will automatically be moved from «Active processes» to «Completed processes».
- Once all tasks in the process have been cancelled, the process will automatically be moved from «Active processes» to «Cancelled processes».

GDPR:

Talent Onboarding is GDPR compliant. If you want to delete information about processes, please contact Talentech.

Please note: A feature where customers can delete processes themselves is to be released in Q2-20.

PROCESS DETAILS

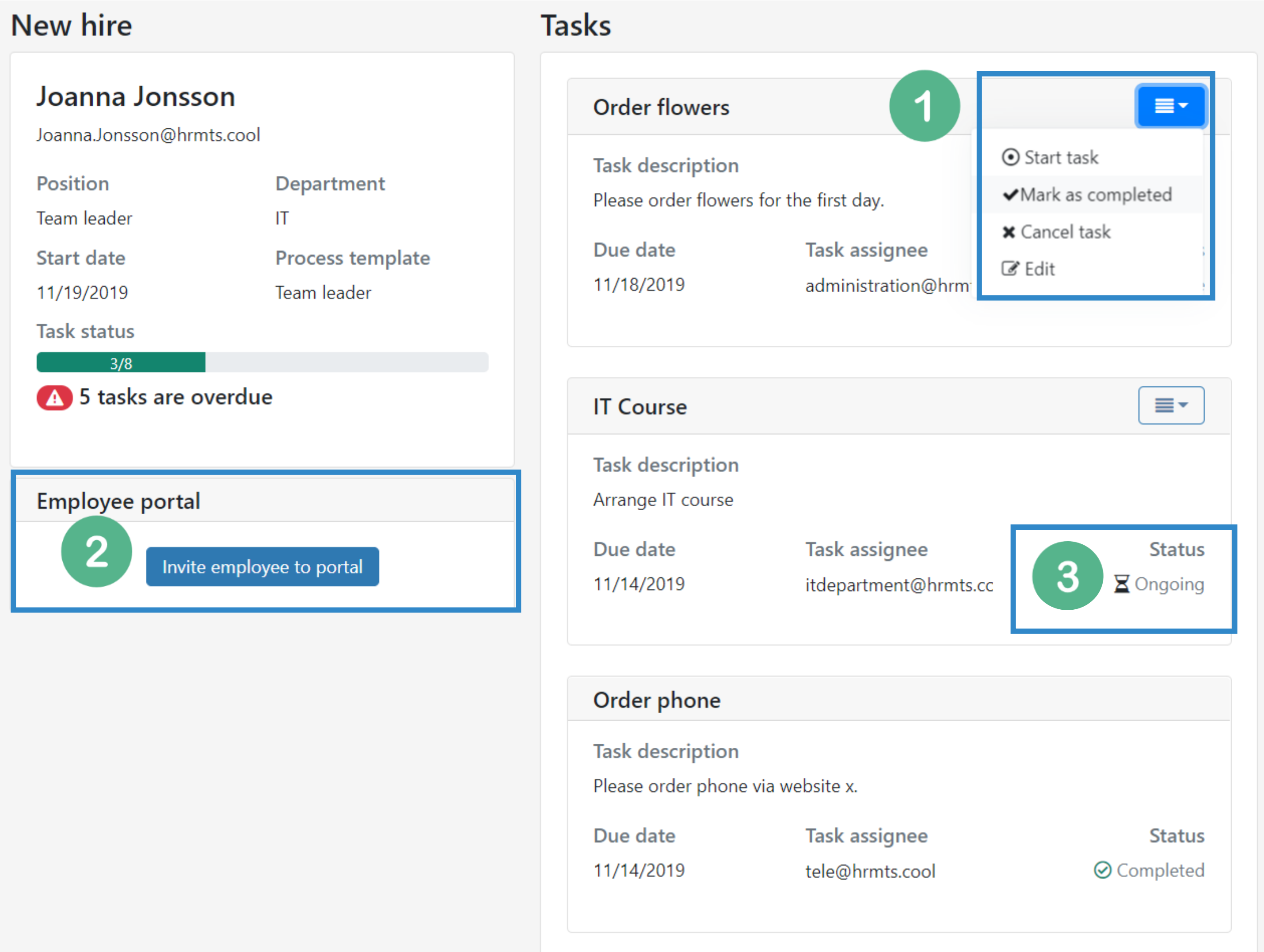
On this page you can:

1
- Start tasks for yourself or on behalf of task assignee.
- Mark tasks as completed, for example if task assignee forgot to.
- Cancel tasks that are no longer valid.
- Edit task, to change task assignee.

2
- Invite employee to the employee portal, or view their portal.

3
- See the status of tasks; active, ongoing, completed and cancelled.

Please note:
When e-mail address to new task assignee is saved, cancellation email is sent to the person who was previously assigned to the task, and the new assignee receives “Task assigned” email. No email will be sent to the process owner when this happens.



New hire

Joanna Jonsson
Joanna.Jonsson@hrmts.cool

Position	Department
Team leader	IT
Start date	**Process template**
11/19/2019	Team leader

Task status
3/8
5 tasks are overdue

Employee portal

Tasks

Order flowers
Task description
Please order flowers for the first day.

Due date	Task assignee
11/18/2019	administration@hrm

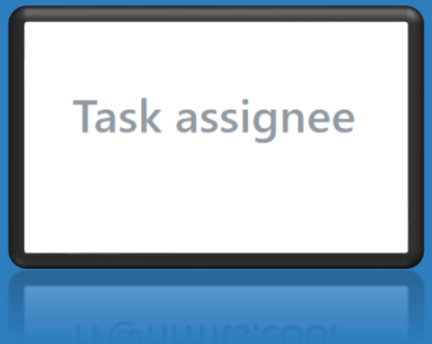
IT Course
Task description
Arrange IT course

Due date	Task assignee	Status
11/14/2019	itdepartment@hrmts.cc	⌛ Ongoing

Order phone
Task description
Please order phone via website x.

Due date	Task assignee	Status
11/14/2019	tele@hrmts.cool	✓ Completed

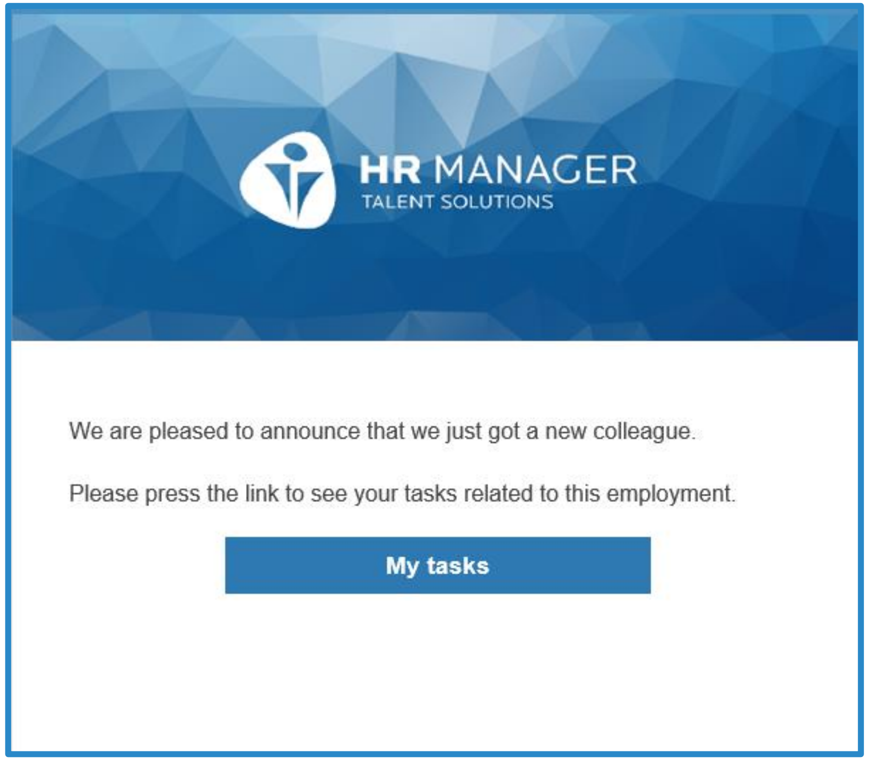
EMAILS & REMINDERS



Task assignee

EMAIL ABOUT NEW TASKS

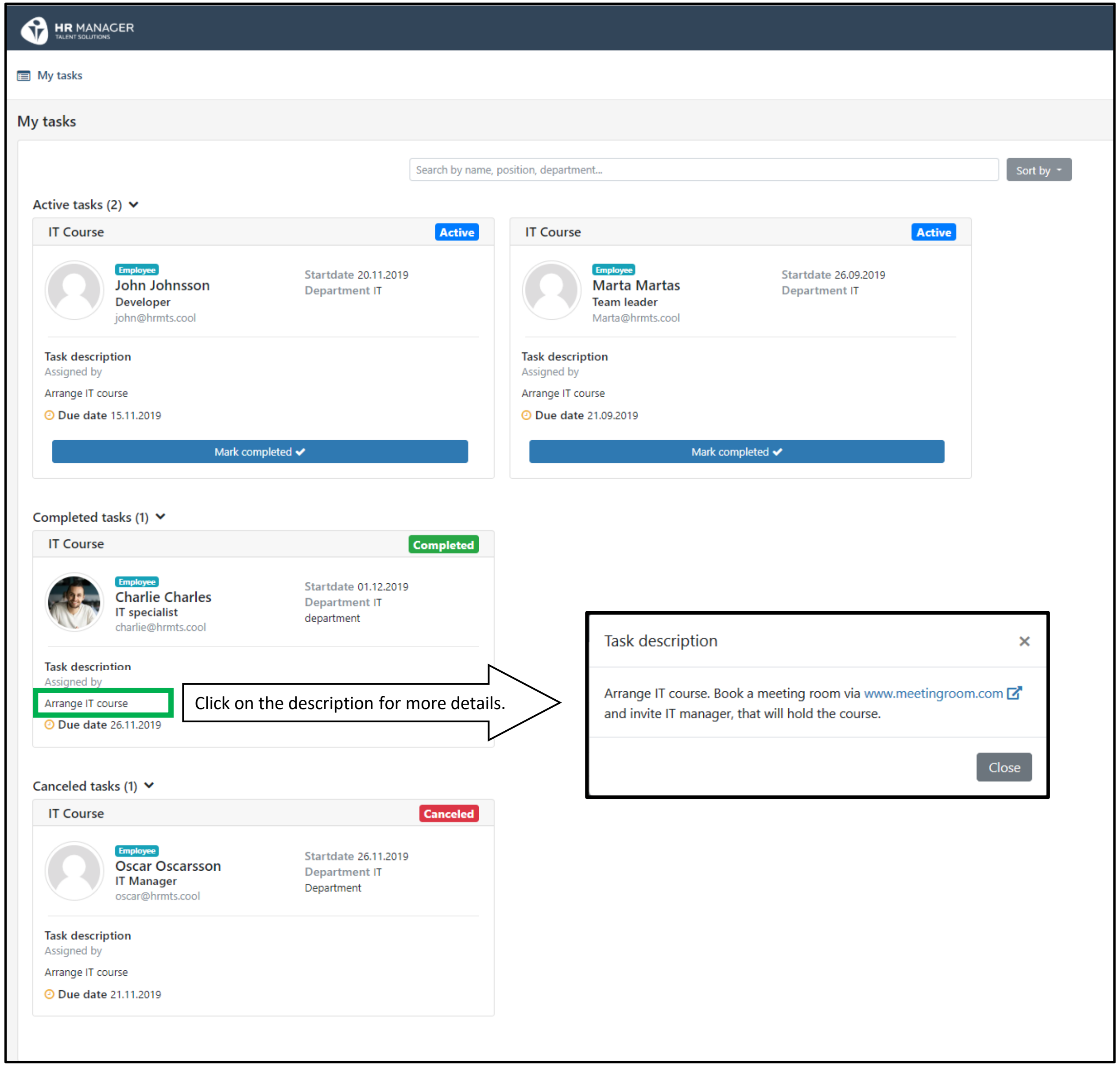
When a process starts, the task assignees will receive an e-mail immediately. There are no task details in the e-mails, the link will take the assignee to *My tasks* in the system.


HR MANAGER
TALENT SOLUTIONS

We are pleased to announce that we just got a new colleague.

Please press the link to see your tasks related to this employment.

My tasks


HR MANAGER
TALENT SOLUTIONS
My tasks
Search by name, position, department...
Sort by
Mark completed ✓
Mark completed ✓
Close

My tasks

Active tasks (2)

IT Course — Active
Employee
John Johnsson
Developer
john@hrmts.cool
Startdate 20.11.2019
Department IT
Task description
Assigned by
Arrange IT course
Due date 15.11.2019

IT Course — Active
Employee
Marta Martas
Team leader
Marta@hrmts.cool
Startdate 26.09.2019
Department IT
Task description
Assigned by
Arrange IT course
Due date 21.09.2019

Completed tasks (1)

IT Course — Completed
Employee
Charlie Charles
IT specialist
charlie@hrmts.cool
Startdate 01.12.2019
Department IT
department
Task description
Assigned by
Arrange IT course
Due date 26.11.2019

Click on the description for more details.

Task description

Arrange IT course. Book a meeting room via www.meetingroom.com and invite IT manager, that will hold the course.

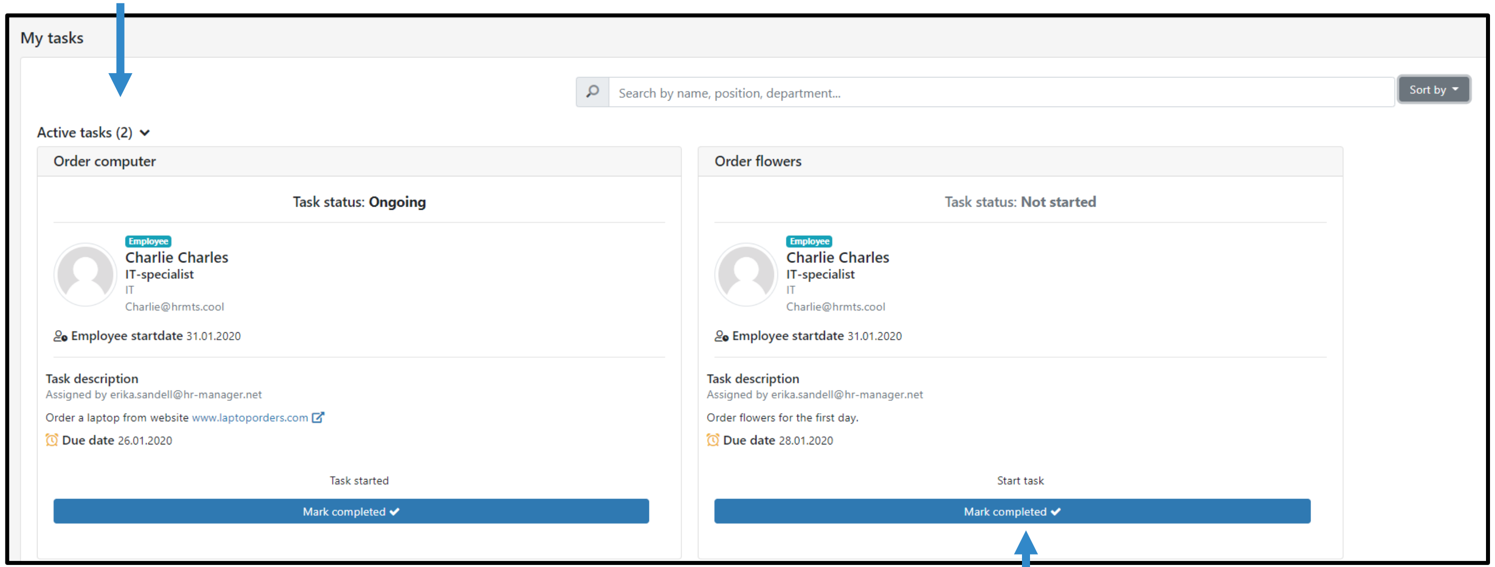
Canceled tasks (1)

IT Course — Canceled
Employee
Oscar Oscarsson
IT Manager
oscar@hrmts.cool
Startdate 26.11.2019
Department IT
Department
Task description
Assigned by
Arrange IT course
Due date 21.11.2019

MY TASKS

In *My tasks* the assignee can see all own tasks.

The tasks are grouped by status: *active, completed and canceled.*



My tasks

Search by name, position, department...

Sort by

Active tasks (2)

Order computer

Task status: **Ongoing**

Employee

Charlie Charles

IT-specialist

IT

Charlie@hrmts.cool

Employee startdate 31.01.2020

Task description

Assigned by erika.sandell@hr-manager.net

Order a laptop from website www.laptoporders.com

Due date 26.01.2020

Task started

Mark completed ✓

Order flowers

Task status: **Not started**

Employee

Charlie Charles

IT-specialist

IT

Charlie@hrmts.cool

Employee startdate 31.01.2020

Task description

Assigned by erika.sandell@hr-manager.net

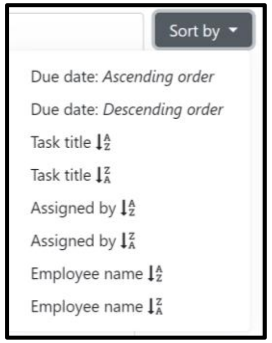
Order flowers for the first day.

Due date 28.01.2020

Start task

Mark completed ✓

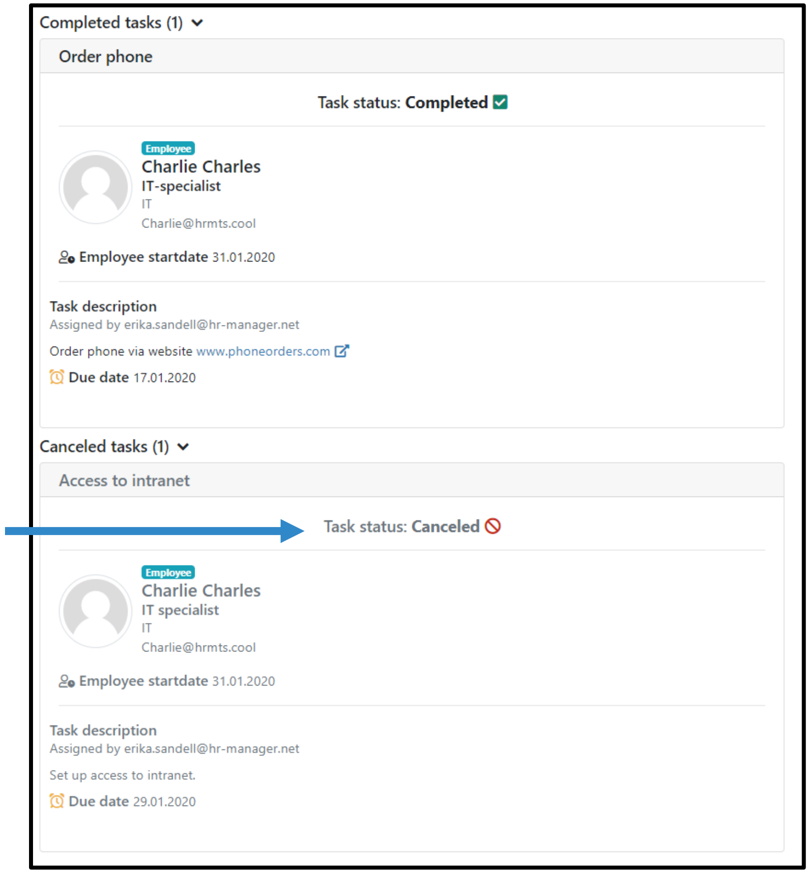
The tasks can be sorted by:



Sort by

- Due date: *Ascending order*
- Due date: *Descending order*
- Task title ↓AZ
- Task title ↓ZA
- Assigned by ↓AZ
- Assigned by ↓ZA
- Employee name ↓AZ
- Employee name ↓ZA

The task assignee can start tasks or mark them as completed.



Completed tasks (1)

Order phone

Task status: **Completed** ☑

Employee

Charlie Charles

IT-specialist

IT

Charlie@hrmts.cool

Employee startdate 31.01.2020

Task description

Assigned by erika.sandell@hr-manager.net

Order phone via website www.phoneorders.com

Due date 17.01.2020

Canceled tasks (1)

Access to intranet

Task status: **Canceled** ⃠

Employee

Charlie Charles

IT specialist

IT

Charlie@hrmts.cool

Employee startdate 31.01.2020

Task description

Assigned by erika.sandell@hr-manager.net

Set up access to intranet.

Due date 29.01.2020

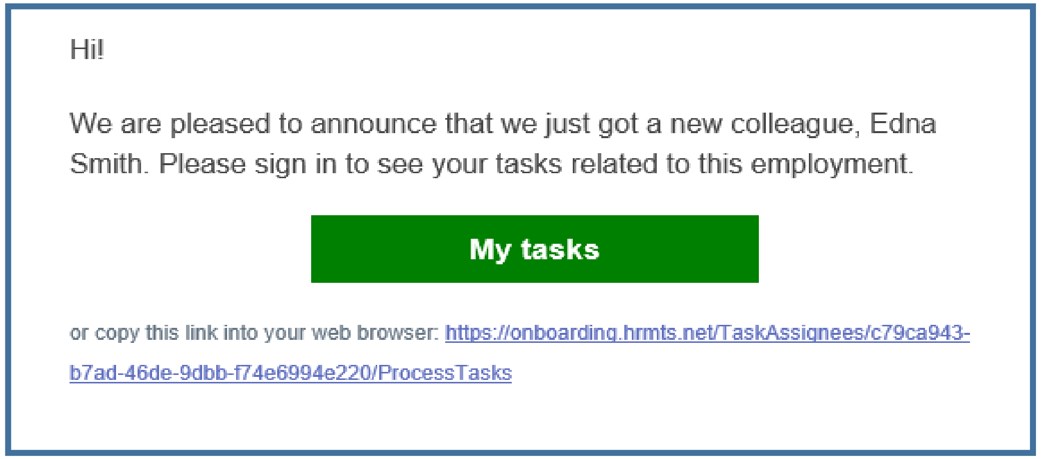
Each task is marked with current status:
Ongoing, not started, completed, canceled.

REMINDERS

Both **task assignee** and **process owner** will receive two reminders for the tasks:

- Seven days before due date
- In the morning on due date

For task assignee:

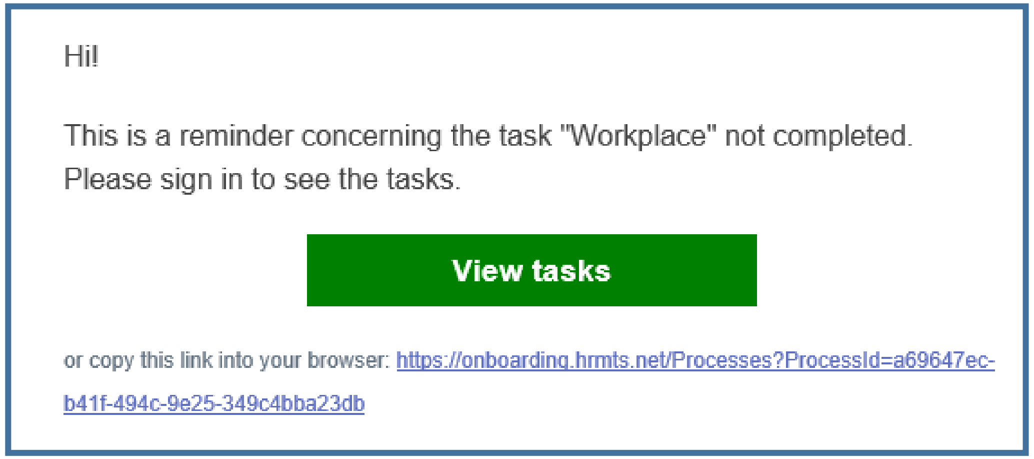


Hi!

We are pleased to announce that we just got a new colleague, Edna Smith. Please sign in to see your tasks related to this employment.

or copy this link into your web browser: https://onboarding.hrmts.net/TaskAssignees/c79ca943-b7ad-46de-9dbb-f74e6994e220/ProcessTasks

For process owner:



Hi!

This is a reminder concerning the task "Workplace" not completed. Please sign in to see the tasks.

or copy this link into your browser: https://onboarding.hrmts.net/Processes?ProcessId=a69647ec-b41f-494c-9e25-349c4bba23db

CUSTOMIZATION

In Employee portal background picture and logo can be uploaded.

- Recommended background picture resolution (pixels):
  - **W 2560 x H 640**
- Recommended logo resolution (pixels):
  - **W: 470 x H 150**
- Standard background if nothing is uploaded:

Kundeprofil

PLEASE NOTE: Logo and background can not be deleted once uploaded.
But you can replace it with another logo and background.

Customer support can delete logo and reset background for you.

ADDITIONAL INFORMATION

- Max size for attachments in a card in the employee portal is 20 MB.
- Videos are not to be uploaded in portal, just linked to.
- Only users can cancel tasks in the process module.
- User won’t get notification if the candidate has answered questions, confirmed actions or read documents in Employee portal. But candidate can inform user about this via message in the chat card.
- Only users can upload documents in portal. Candidates can not.