

User guide

# Talent Onboarding Version 2



**HR MANAGER**  
TALENT SOLUTIONS

# OVERVIEW

- What is Talent Onboarding?
- Talent Onboarding Version 1 → Version 2
- 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
- Additional information



# 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:**

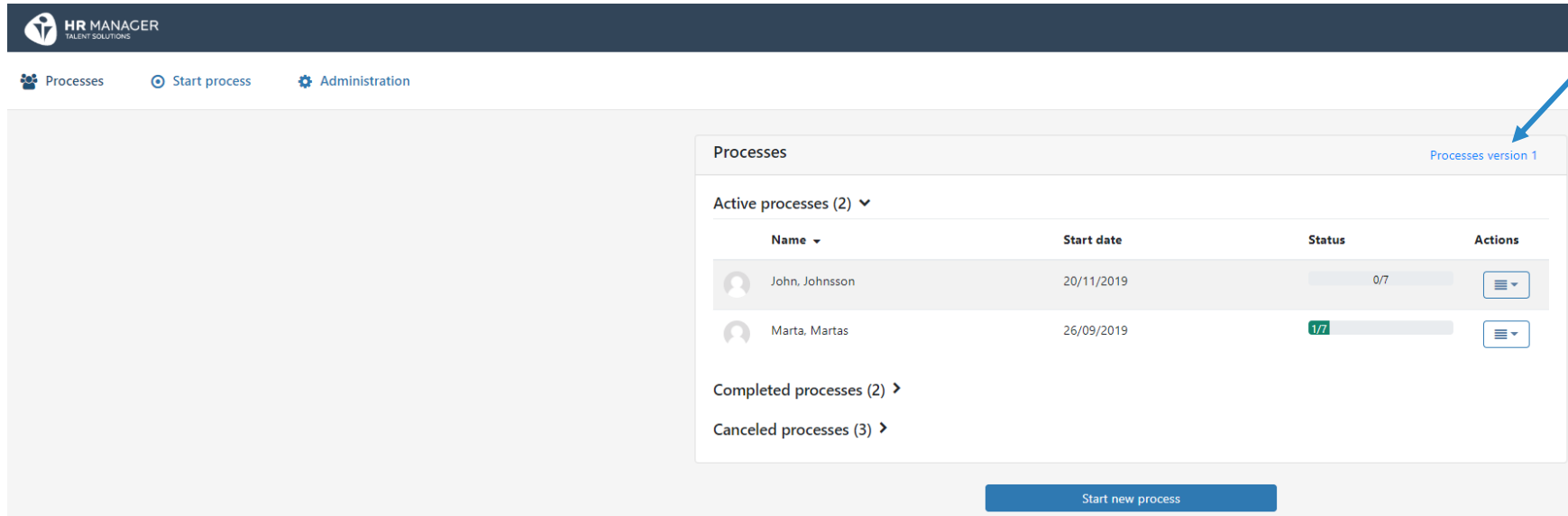
- Create processes with tasks to be executed for new employee.
- Reminders is automatically sent to task assignees and process owners.
- Task assignee can be anyone with a mailadress. (Don't need user access in the system).

## **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.

Customer version

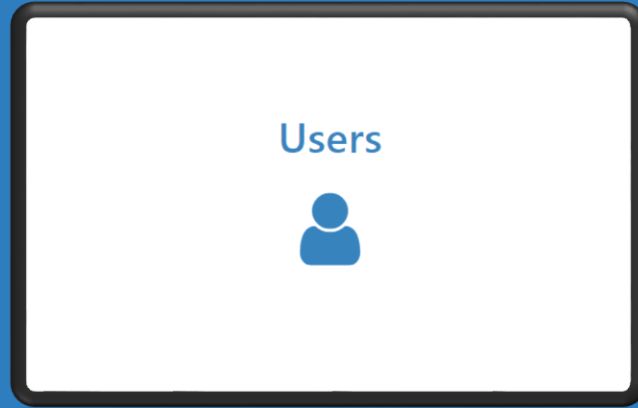


# SET UP ONBOARDING

**Before starting the onboarding process you need to:**

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

# ROLES



Customer version



# ROLES

## There are two user roles in Talent Onboarding:

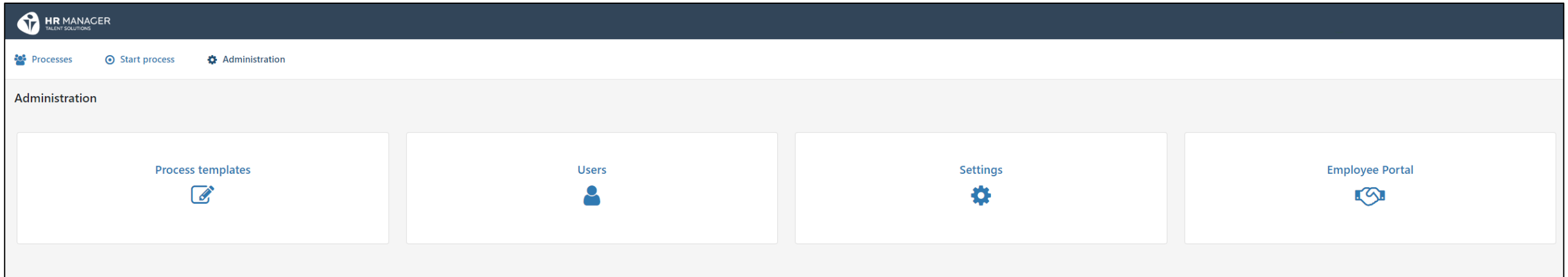
- User: Have access to all functions but Administration menu.
  - Users can only see their own processes.
  - Users can only see portals for their own processes.
- Administrator: Have access to all functions including Administration menu.
  - Administrator can see all processes.
  - Administrator can 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:

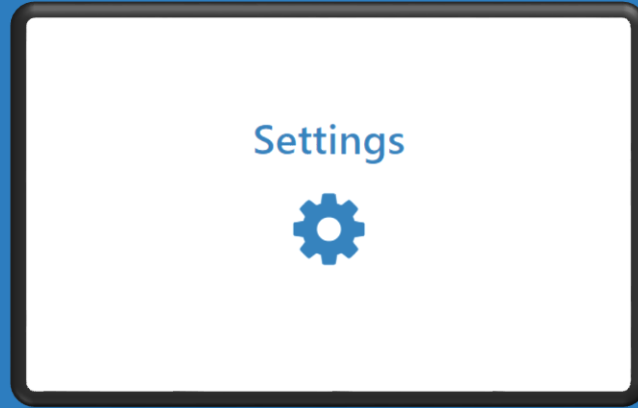
1. Create processes with unlimited number of tasks in Process templates.
2. Register users and roles in Users.
3. Set system e-mail language in Settings.
4. Create portals in Employee portal.



Customer version



# LANGUAGES



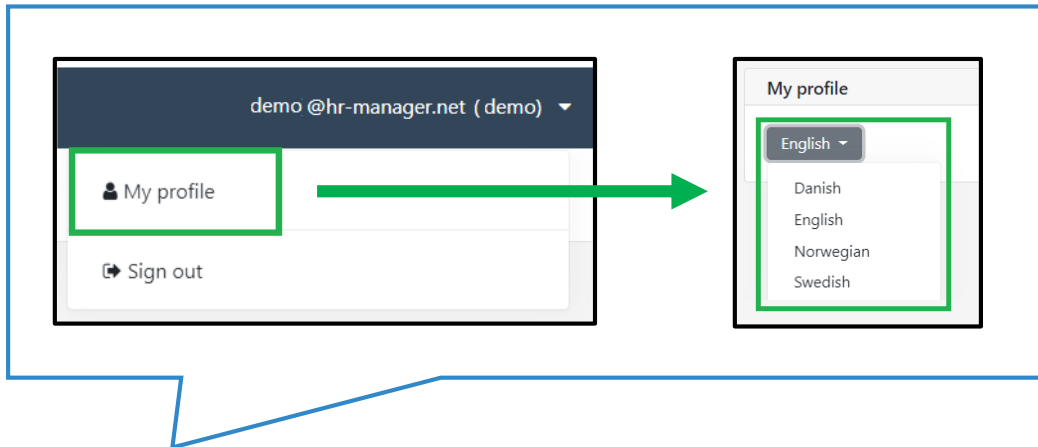
Customer version



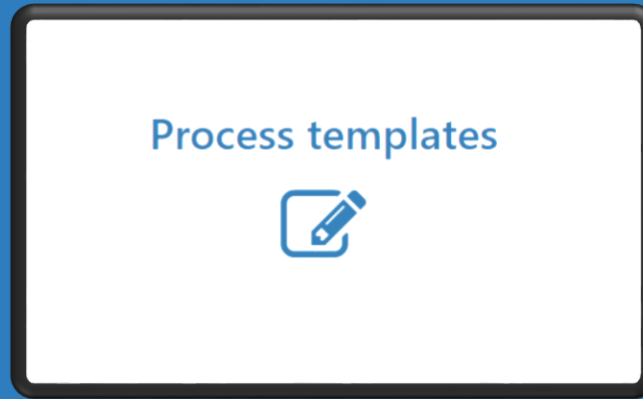
# LANGUAGES

## Languages available: Danish, English, Norwegian, Swedish.

- **One common system language for text in e-mails can be selected per solution.** Multi language customers must agree on which system language to use.
- **Processes can be created in any language.**
- **Users & task assignees** can individually select their own user system languages via My profile. If nothing is selected, the user language will be the same as the system language.



# PROCESS TEMPLATES

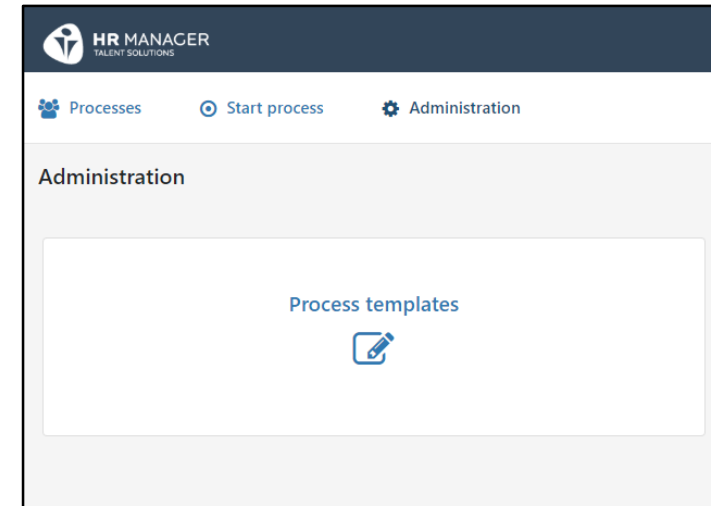


Customer version



# CREATE NEW PROCESS TEMPLATE

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

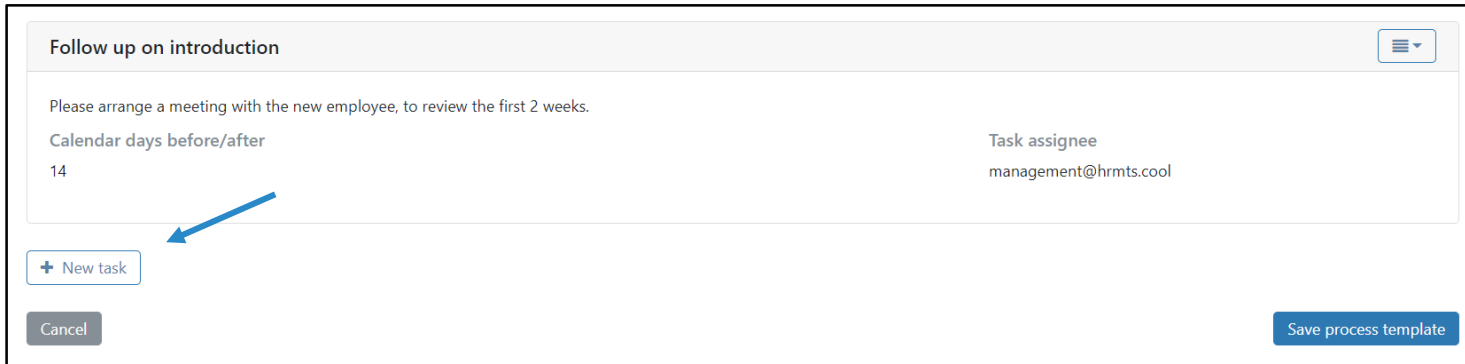


Onboarding process templates		Process templates version 1
Process name	Number of tasks	Actions
HR Onboarding	5	
IT-specialist	7	
Team leader	7	

[+ New template](#)

Customer version

# CREATE NEW PROCESS TEMPLATE



The screenshot shows a process template editor. At the top, there is a header "Follow up on introduction" with a dropdown menu icon. Below the header, there is a task description: "Please arrange a meeting with the new employee, to review the first 2 weeks." To the left of the description, it says "Calendar days before/after" with the value "14". To the right, it says "Task assignee" with the email "management@hrmts.cool". At the bottom left, there is a "+ New task" button with a blue arrow pointing to it. At the bottom right, there is a "Save process template" button. At the bottom left, there is a "Cancel" button.

## 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

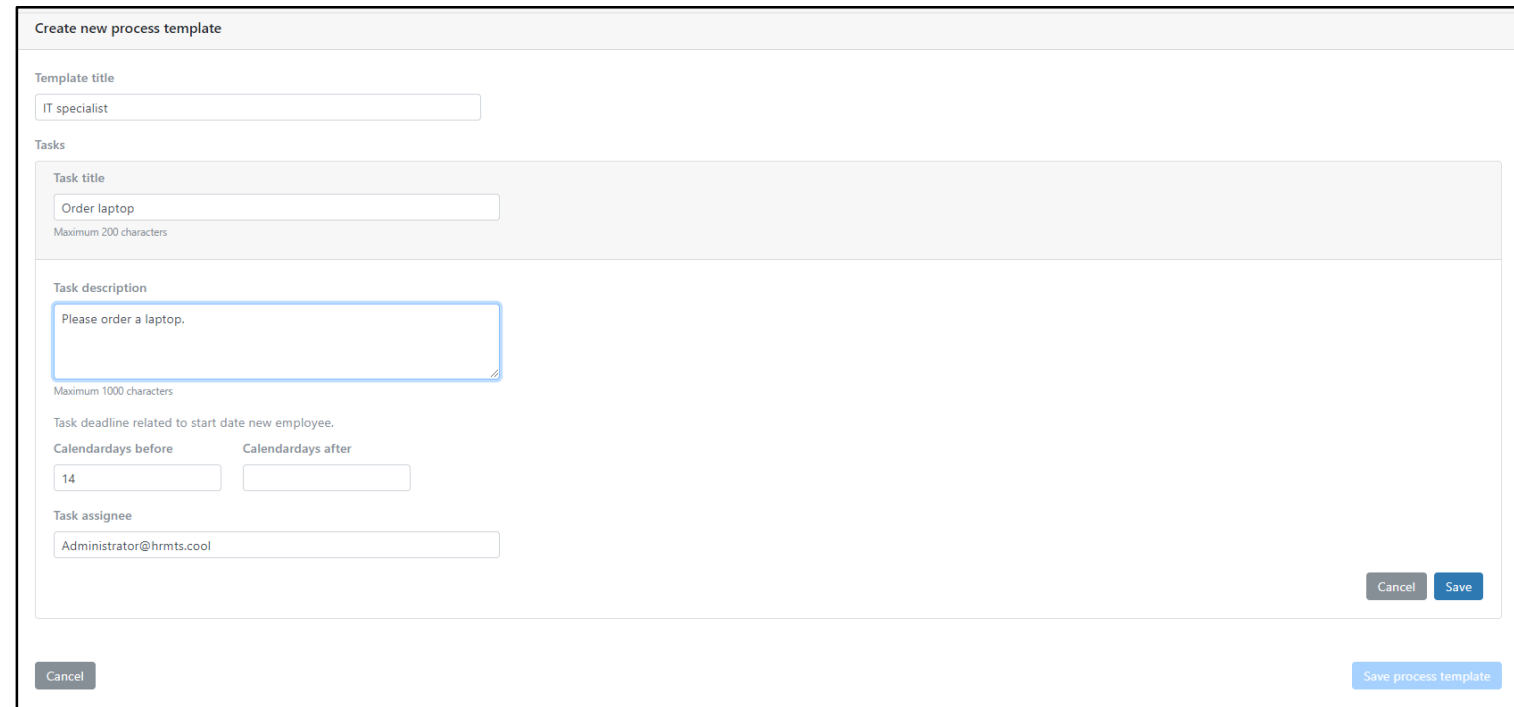
1. Add a task to the process, including a task description, task deadline and task assignee.

- **Task description:** In this field you may add details about the task.
- **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.



The screenshot shows the "Create new process template" form. It has a header "Create new process template". Below the header, there is a "Template title" field with the value "IT specialist". Below that, there is a "Tasks" section. Inside the "Tasks" section, there is a "Task title" field with the value "Order laptop" and a note "Maximum 200 characters". Below that, there is a "Task description" field with the value "Please order a laptop." and a note "Maximum 1000 characters". Below that, there is a "Task deadline related to start date new employee." section with two input fields: "Calendar days before" with the value "14" and "Calendar days after" which is empty. Below that, there is a "Task assignee" field with the value "Administrator@hrmts.cool". At the bottom right, there are "Cancel" and "Save" buttons. At the bottom left, there is a "Cancel" button. At the bottom right, there is a "Save process template" button.

**When all tasks have been created, remember to save the process template!**





# 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

Onboarding process templates Process templates version 1

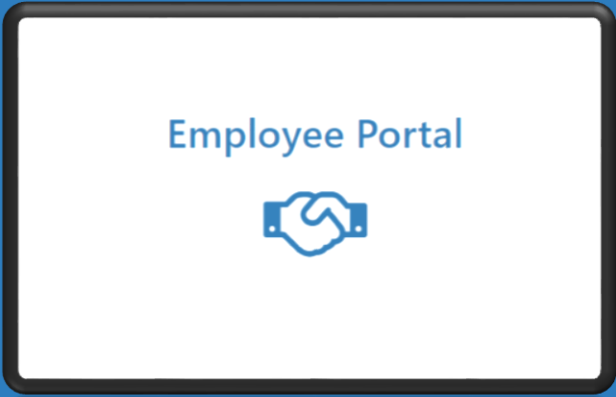
Process name	Number of tasks	Actions
HR Onboarding	5	
IT-specialist	7	 Edit  Copy  Delete
Team leader	7	

[+ New template](#)

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.

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

# EMPLOYEE PORTAL



Customer version

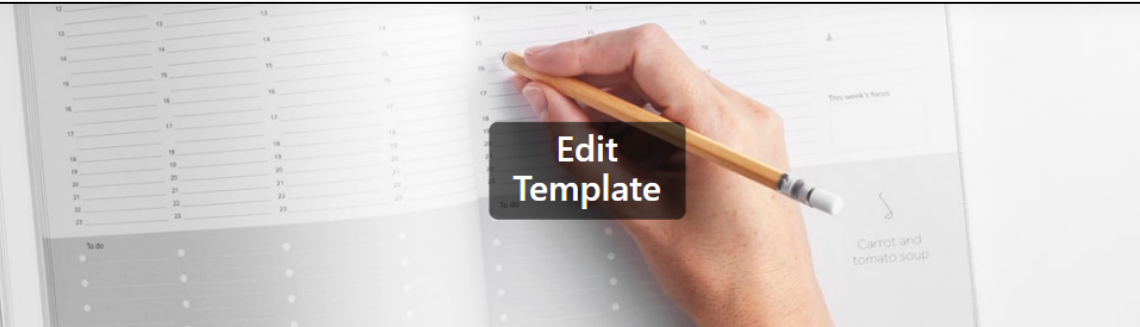


# CREATE EMPLOYEE PORTAL

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.

Customer version



**Edit Template**

## 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

New hire  
NH Thank you! 😊

Welcome! YO

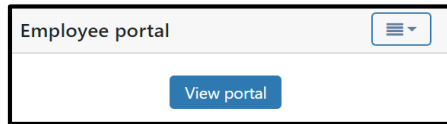
Say something...

+ Add card



# VIEW AN EMPLOYEE'S PORTAL

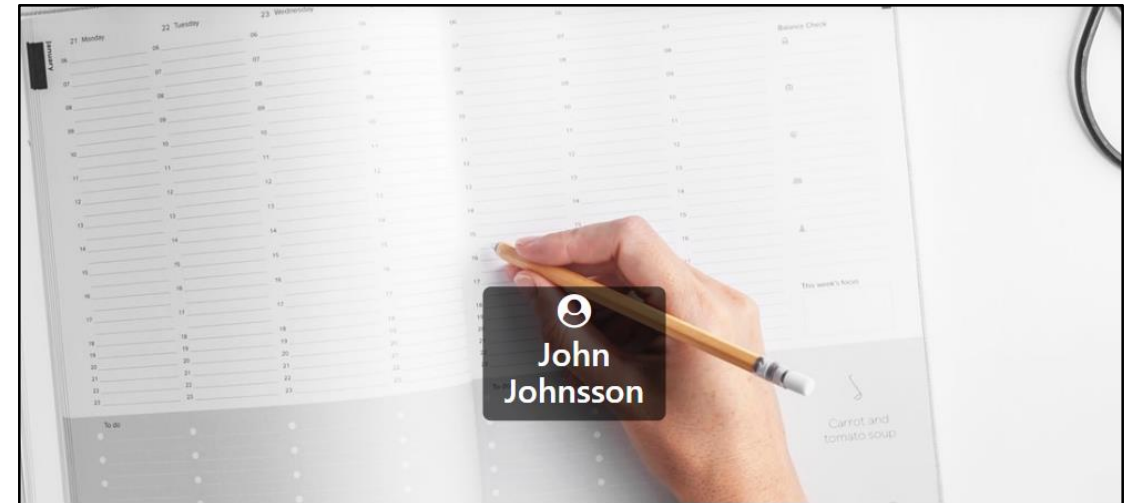
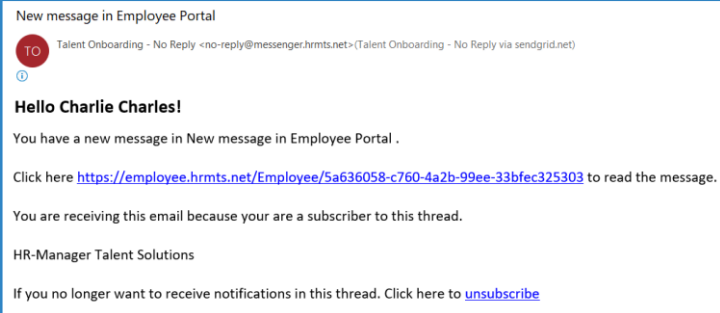
Via Processes → Edit process, you can view the employee's portal.



## This 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.



### HR Onboarding

#### WELCOME TO HR ONBOARDING

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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](mailto:manager@hrmts.cool)

**HR:** [hr@hrmts.cool](mailto:hr@hrmts.cool)

**IT:** [it@hrmts.cool](mailto: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.

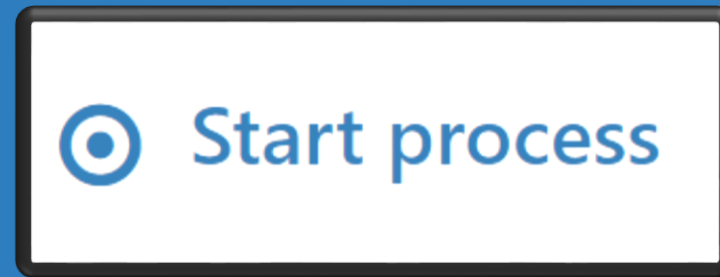
2019-09-25

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

Write something...



# START AN ONBOARDING PROCESS



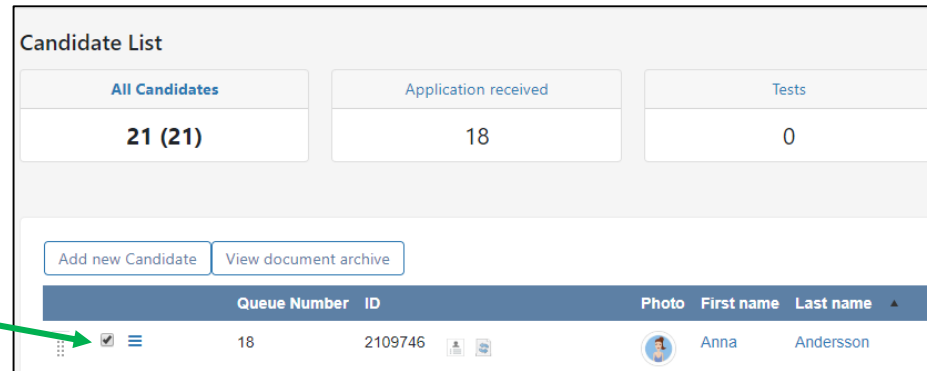
Customer version



# 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**.

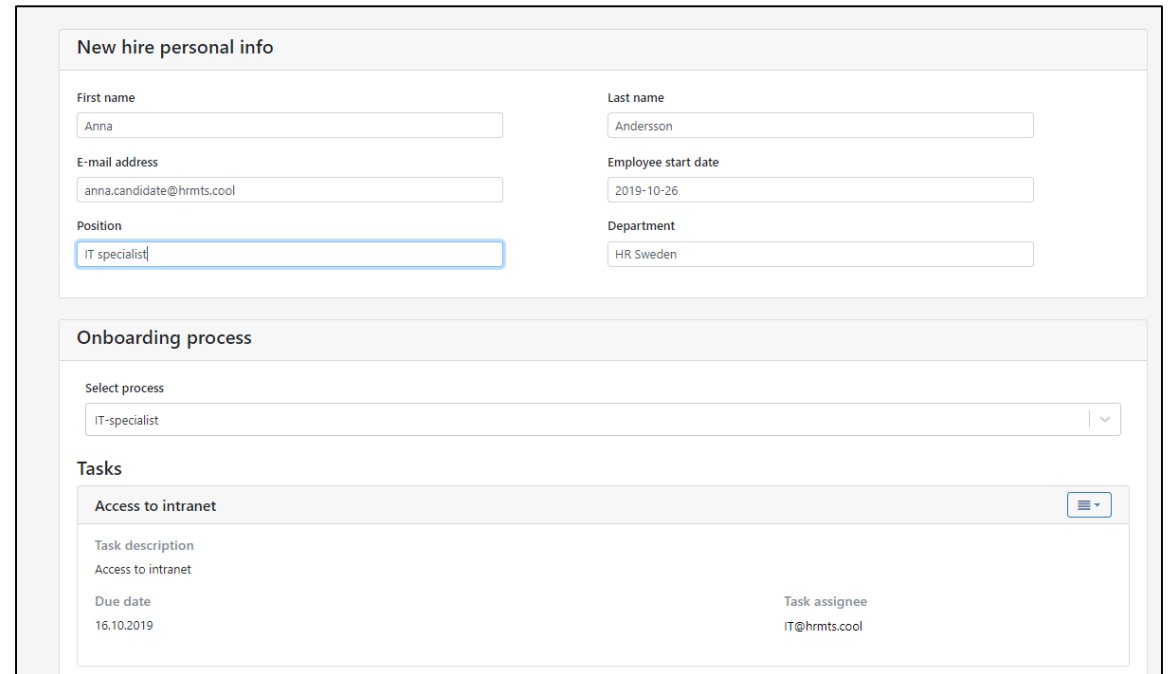
## Recruitment system:



The screenshot shows a 'Candidate List' interface. At the top, there are three summary boxes: 'All Candidates' with a value of 21 (21), 'Application received' with a value of 18, and 'Tests' with a value of 0. Below these are two buttons: 'Add new Candidate' and 'View document archive'. A table below contains candidate information with columns for Queue Number, ID, Photo, First name, and Last name. The first row shows a candidate with Queue Number 18, ID 2109746, and names Anna and Andersson. A green arrow points to the selection icon (a checkmark in a square) in the first row of the table.

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

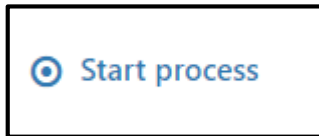
Information will be prefilled in the *Start process* screen.  
Select **Employee start date** and **Onboarding process**.



The screenshot shows the 'Start process' screen. It is divided into two main sections: 'New hire personal info' and 'Onboarding process'. The 'New hire personal info' section contains several input fields: 'First name' (Anna), 'Last name' (Andersson), 'E-mail address' (anna.candidate@hrmts.cool), 'Employee start date' (2019-10-26), 'Position' (IT specialist), and 'Department' (HR Sweden). The 'Onboarding process' section includes a 'Select process' dropdown menu set to 'IT-specialist' and a 'Tasks' section. The 'Tasks' section shows a task titled 'Access to intranet' with a task description, a due date of 16.10.2019, and a task assignee of 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	Last name
<input type="text" value="Anna"/>	<input type="text" value="Andersson"/>
E-mail address	Employee start date
<input type="text" value="anna.candidate@hrmts.cool"/>	<input type="text" value="2019-10-26"/>
Position	Department
<input type="text" value="IT specialist"/>	<input type="text" value="HR Sweden"/>

### Onboarding process

Select process

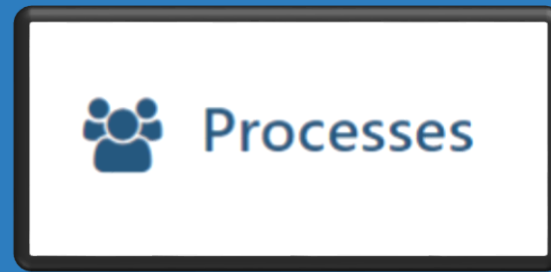
### Tasks

<b>Access to intranet</b>	<input type="text" value="IT@hrmts.cool"/>
Task description	
Access to intranet	
Due date	Task assignee
16.10.2019	IT@hrmts.cool

<b>Assign mentor</b>	<input type="text" value="management@hrmts.cool"/>
Task description	
Please assign a mentor that our new employee will have for the first 2 weeks.	
Due date	Task assignee
19.10.2019	management@hrmts.cool

Start process

# PROCESS OVERVIEW & DETAILS



Customer version



# PROCESSES OVERVIEW

The screenshot displays a 'Processes' overview page. At the top right, it says 'Processes version 1'. Below the title, there are three sections: 'Active processes (2)', 'Completed processes (2)', and 'Canceled processes (3)'. Each section contains a table with columns for Name, Start date, Status, and Actions. In the 'Active processes' section, a dropdown menu is open for the 'Marta, Martas' process, showing 'Edit process' and 'Cancel process' options. At the bottom, there is a blue button labeled 'Start new process'.

Name	Start date	Status	Actions
John, Johnsson	20/11/2019	0/7	[Menu]
Marta, Martas	26/09/2019	3/7	[Menu] (Open)

Name	Start date	Status	Actions
Bo, Boss	16/09/2019	2/2	[Menu]
Charlie, Charles	01/12/2019	7/7	[Menu]

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

Via edit process, you will get to the process details screen. There you will be able to view the details in your process 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».

# PROCESS DETAILS

## On this page you can:

- Invite employee to the employee portal, or view their portal.
- Mark tasks as completed, for example if task assignee forgot to.
- Cancel tasks that are no longer valid.

The screenshot displays a user interface with two main sections: 'New hire' and 'Tasks'.

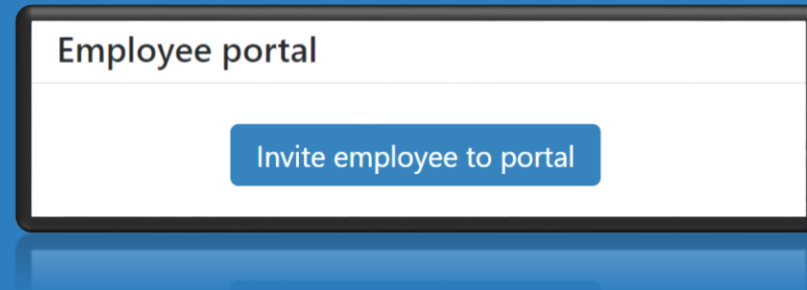
**New hire section:**

- Name:** John Johansson
- Email:** john@hrmts.cool
- Position:** Developer
- Department:** IT
- Start date:** 20.11.2019
- Process template:** IT-specialist
- Task status:** 0/7
- Employee portal:** Includes a button labeled 'Invite employee to portal'.

**Tasks section:**

- Task 1: Access to intranet**
  - Task description:** Access to intranet
  - Due date:** 10.11.2019
  - Task assignee:** it@hrmts.cool
  - Status:** Active
  - Actions:** A dropdown menu is open, showing 'Mark as completed' (checked) and 'Cancel'.
- Task 2: Assign mentor**
  - Task description:** Please assign a mentor that our new employee will have for the first 2 weeks.
  - Due date:** 13.11.2019
  - Task assignee:** management@hrmts.cc
  - Status:** Active
- Task 3: Follow up on introduction**
  - Task description:** Please arrange a meeting with the new employee, to review the first 2 weeks.
  - Due date:** 4.12.2019
  - Task assignee:** management@hrmts.cc
  - Status:** Active

# INVITE EMPLOYEE TO THE EMPLOYEE PORTAL



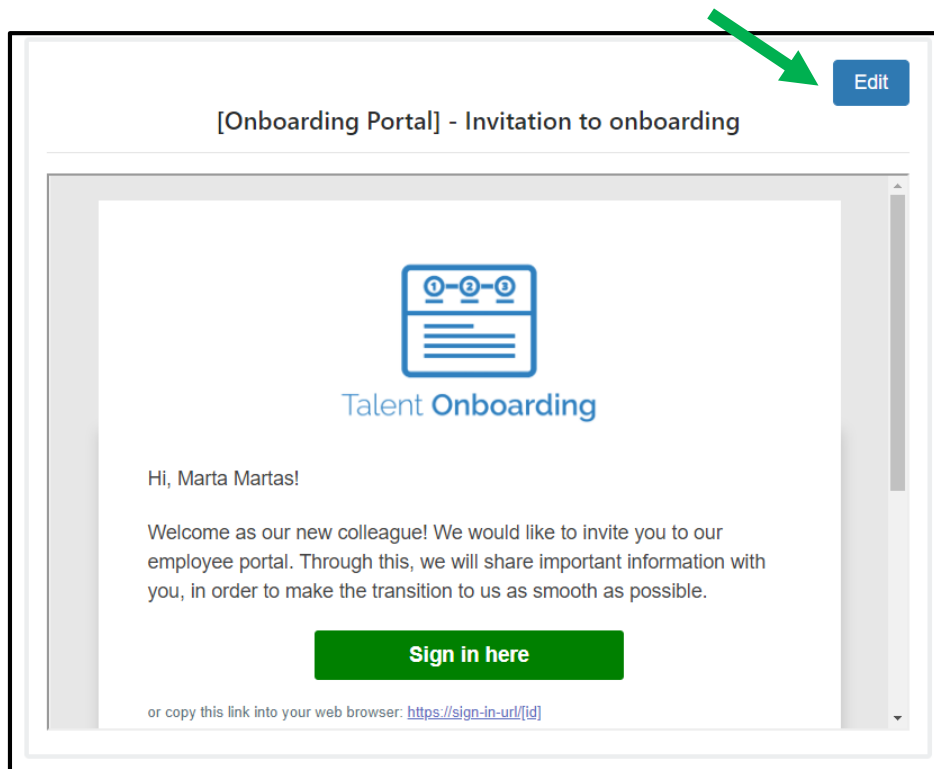
Customer version



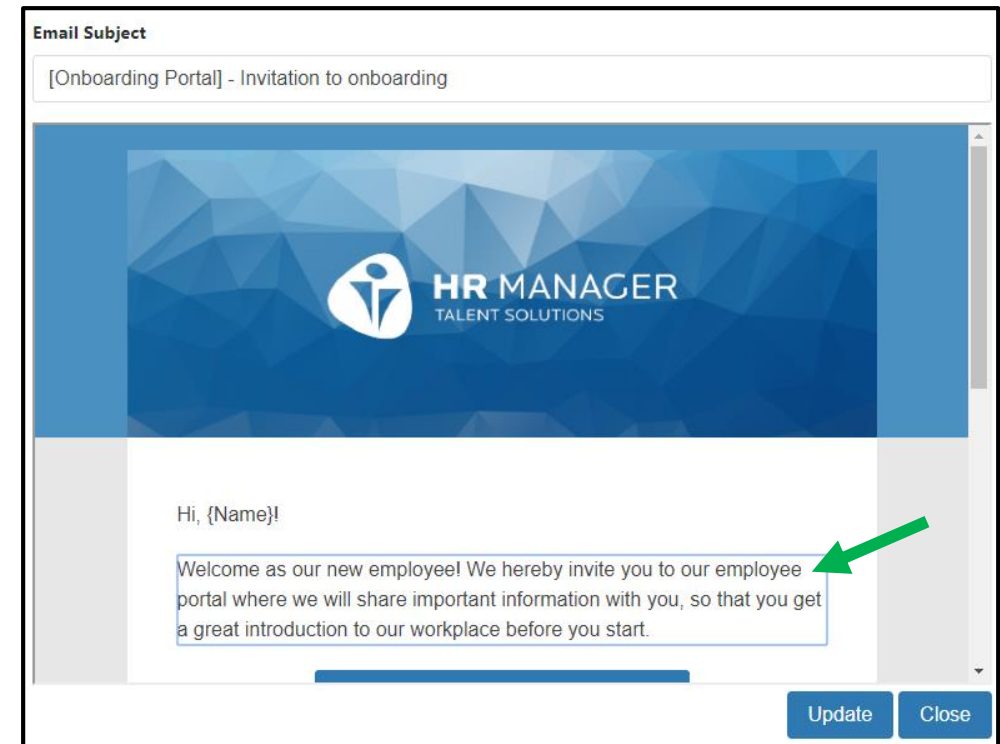


# PORTAL INVITATION TO NEW EMPLOYEES

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



Press edit to adjust the text.



Click on the text you wish to edit.

# EMAILS & REMINDERS

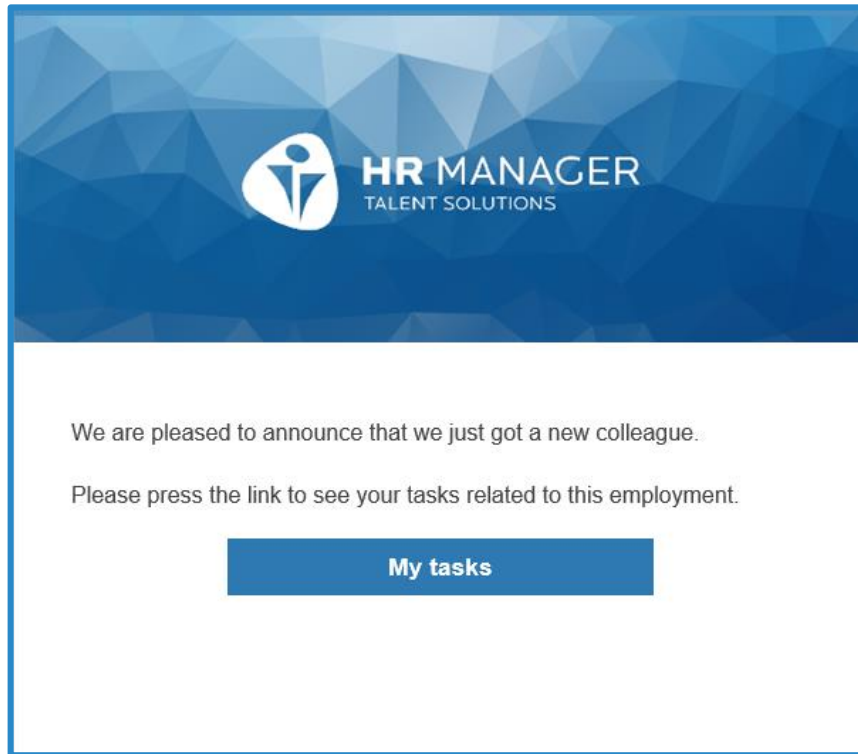
Task assignee

Customer version



# 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.



The screenshot shows the "My tasks" page in the HR Manager system. It is divided into three sections: "Active tasks (2)", "Completed tasks (1)", and "Canceled tasks (1)".

- Active tasks (2):**
  - IT Course (Active):** Assigned to John Johansson (Developer, HR Manager). Startdate: 20.11.2019, Department: IT. Task description: "Arrange IT course". Due date: 15.11.2019. A "Mark completed" button is visible.
  - IT Course (Active):** Assigned to Marta Martas (Team leader, HR Manager). Startdate: 26.09.2019, Department: IT. Task description: "Arrange IT course". Due date: 21.09.2019. A "Mark completed" button is visible.
- Completed tasks (1):**
  - IT Course (Completed):** Assigned to Charlie Charles (IT specialist, HR Manager). Startdate: 01.12.2019, Department: IT. Task description: "Arrange IT course". Due date: 26.11.2019. The task description is highlighted with a green box, and an arrow points to a "Task description" popup window.
- Canceled tasks (1):**
  - IT Course (Canceled):** Assigned to Oscar Oscarsson (IT Manager, HR Manager). Startdate: 26.11.2019, Department: IT. Task description: "Arrange IT course". Due date: 21.11.2019.

The "Task description" popup window shows the details for the "Arrange IT course" task: "Arrange IT course. Book a meeting room, lunch and invite IT Manager that will hold the course." It includes a "Close" button.

# 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:

This is a reminder concerning tasks not completed related to new employees.

Please press the link to see active tasks.

[My tasks](#)

## For process owner:

This is a reminder concerning tasks not completed related to new employees.

Please press the link to see active tasks.

[View tasks](#)

# 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:



**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.
- Only users can cancel tasks.
- Task assignees can start and complete tasks, unless they in addition have user role and own the process.
- 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, not candidates.