

User guide

# Talent Onboarding Version 2



**HR MANAGER**  
TALENT SOLUTIONS

# OVERVIEW

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



# INTERNAL INFORMATION

## Configuration

**Activation of Talent Onboarding solutions must be ordered from development:**

Send a mail to: [jagjit.singh@hr-manager.net](mailto:jagjit.singh@hr-manager.net), containing:

- Name of customer
- Talent Recruiter id (if not stand-alone). Example: (**1574**/runeatledemo)
- Administrator e-mail address. (For one administrator).
- System language: One of these: Danish, English, Norwegian, Swedish
- User- and Task assignee language: One or all of the above.

# INTERNAL INFORMATION

## Configuration (2)

When onboarding starts from **Talent Recruiter** these settings must be activated:

- To be able to transfer candidates from candidate list to onboarding:
  - **Onboarding Enabled**
- Two user roles has to be activated in order to access version 1 processes:
  - **Access to onboarding**
  - **Administration – onboarding**

# INTERNAL INFORMATION

## Configuration (3)

In Employee portal background picture and logo can be uploaded.

- Background picture resolution (pixels):
  - **W 2560 x H 640**
- 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.

Only developers are able to revert to the original background if needed.

# INTERNAL INFORMATION

- Ui culture=xx doesn't work. Change you language in *My profil* which is reacheable in the top right corner.
- Processes can't be deleted at the moment, it's in development que. For now, they will remain in the system indefinitely.
- Candidates have access to the employee portal until user removes the access. Even if the process is cancelled or is completed.
- There are no hierachies or way to differentiate departments in onboarding. Administrators will thus see all templates and all processes.
- 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 addtition 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.
- **In some weeks it will be possible to brand each portal template.**
- **Start date can't be changed after starting a process. The possibility to do that is in development.**

# 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:**

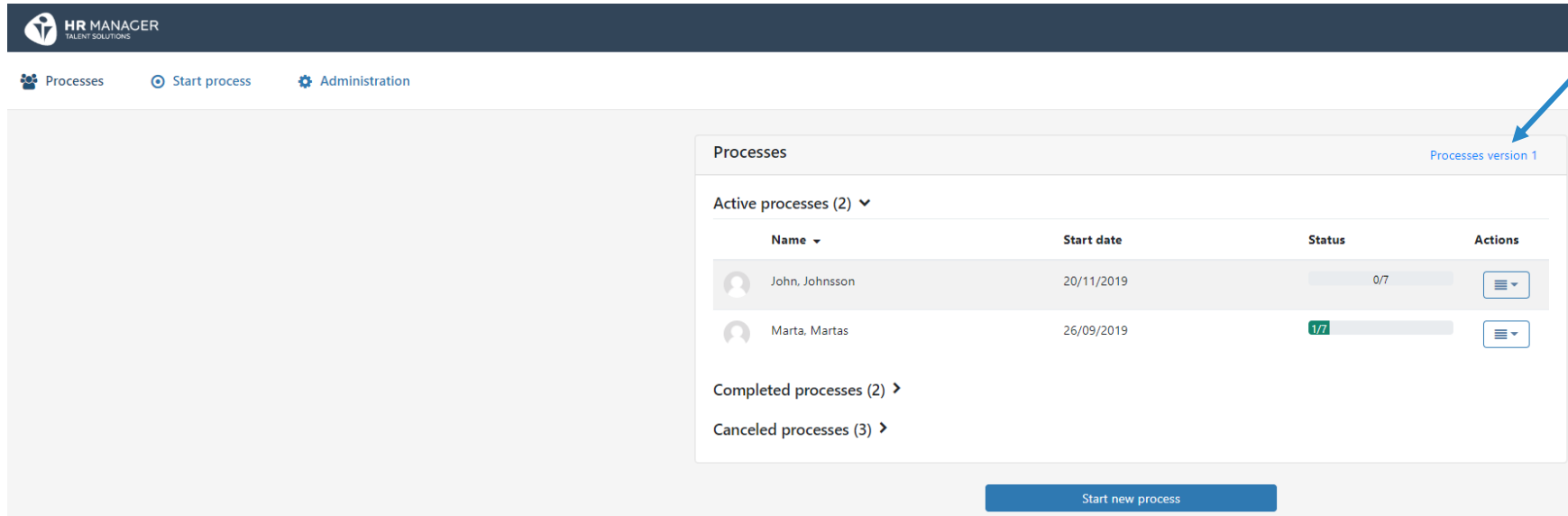
- Create processes with tasks to be executed for new employee.
- Reminders is automatically sent to task assignees and process owners.
- Task assignee can be anyone with a mailadress. (Don't need user access in the system).

## **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.



The screenshot shows the HR Manager Talent Solutions interface. The top navigation bar includes 'Processes', 'Start process', and 'Administration'. The main content area displays a 'Processes' panel with a dropdown menu for 'Active processes (2)'. Below this, a table lists active processes:

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

Below the table, there are links for 'Completed processes (2) >' and 'Canceled processes (3) >'. A 'Start new process' button is located at the bottom of the panel. A blue arrow points to a link labeled 'Processes version 1' in the top right corner of the 'Processes' panel.

## 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.



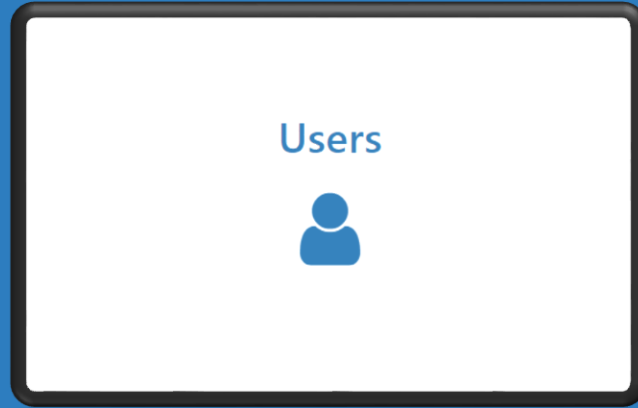


# SET UP ONBOARDING

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

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

# ROLES



# ROLES

## There are two user roles in Talent Onboarding:

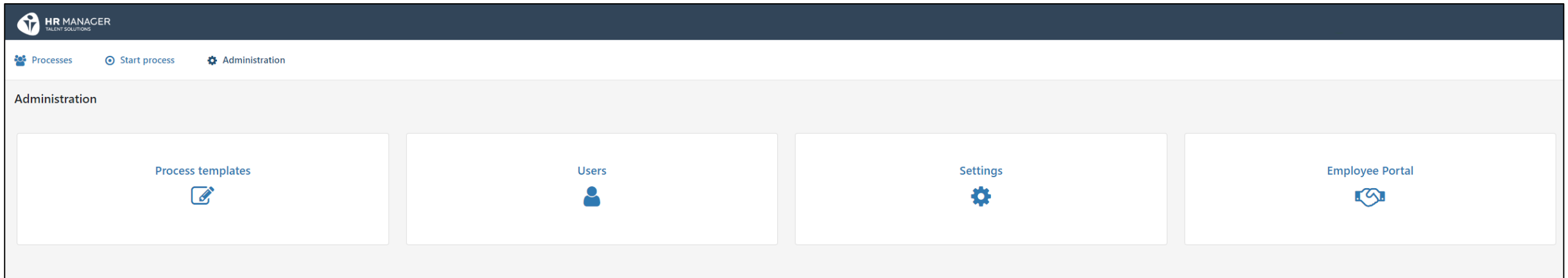
- User: Have access to all functions but Administration menu.
  - Users can only see their own processes.
  - Users can only see portals for their own processes.
- Administrator: Have access to everything user have access to and Administration menu.
  - Administrator can see all processes.
  - Administrator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

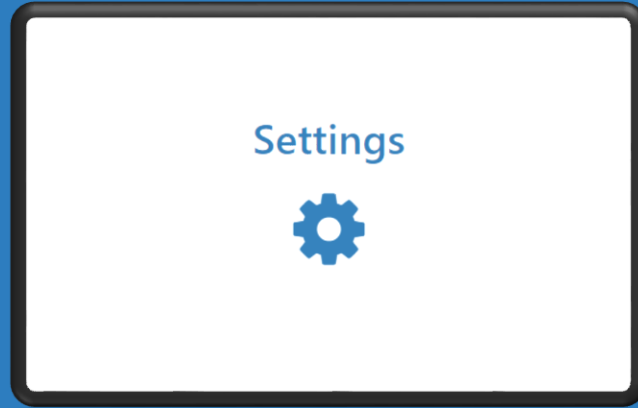
# ADMINISTRATION

## 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.



# LANGUAGES



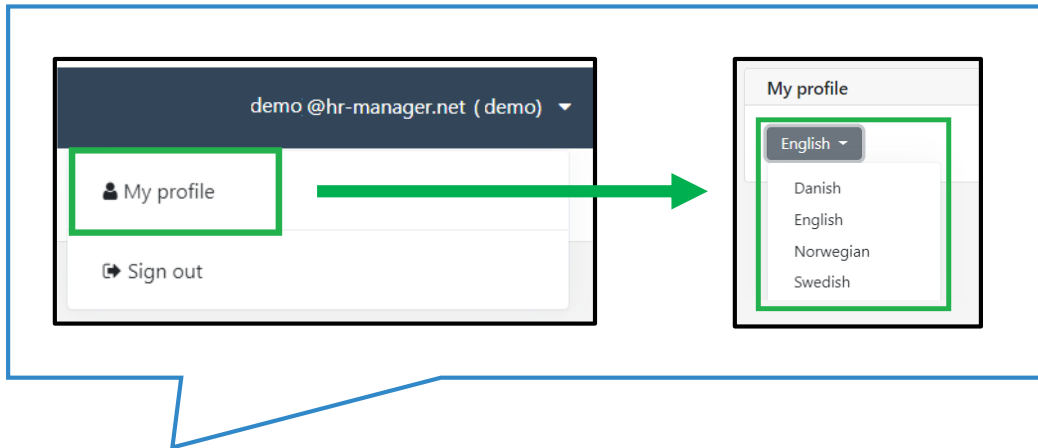
Internal version



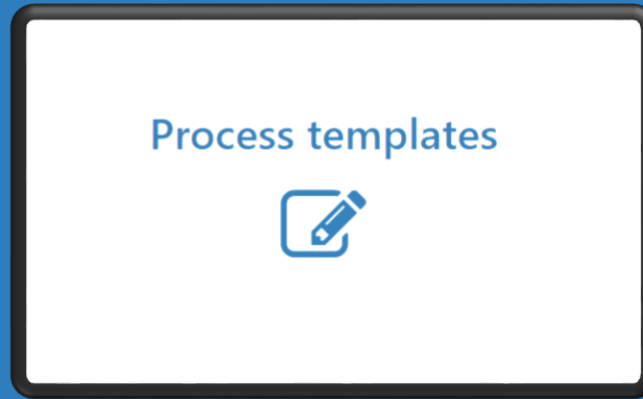
# LANGUAGES

## 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.

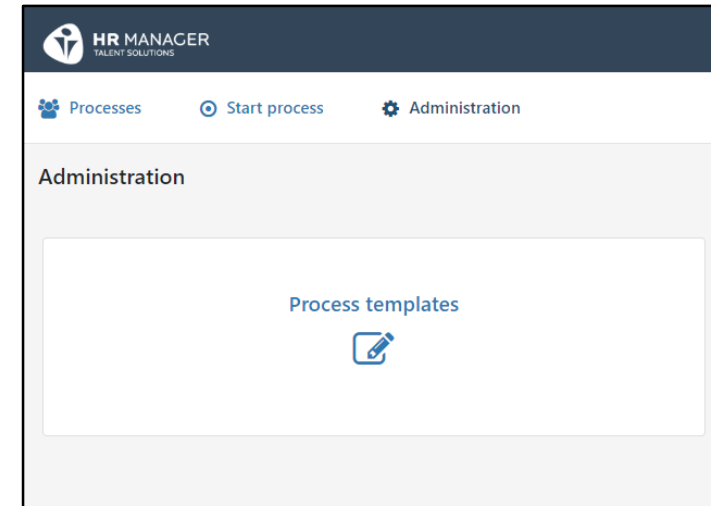


# PROCESS TEMPLATES



# CREATE NEW PROCESS TEMPLATE

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



Onboarding process templates Process templates version 1

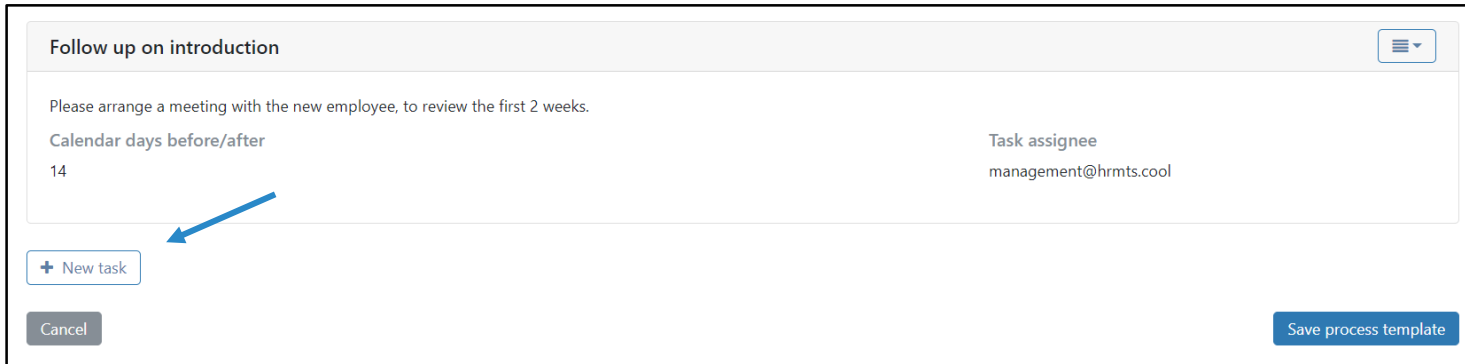
Process name	Number of tasks	Actions
HR Onboarding	5	
IT-specialist	7	
Team leader	7	

[+ New template](#)

Internal 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 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

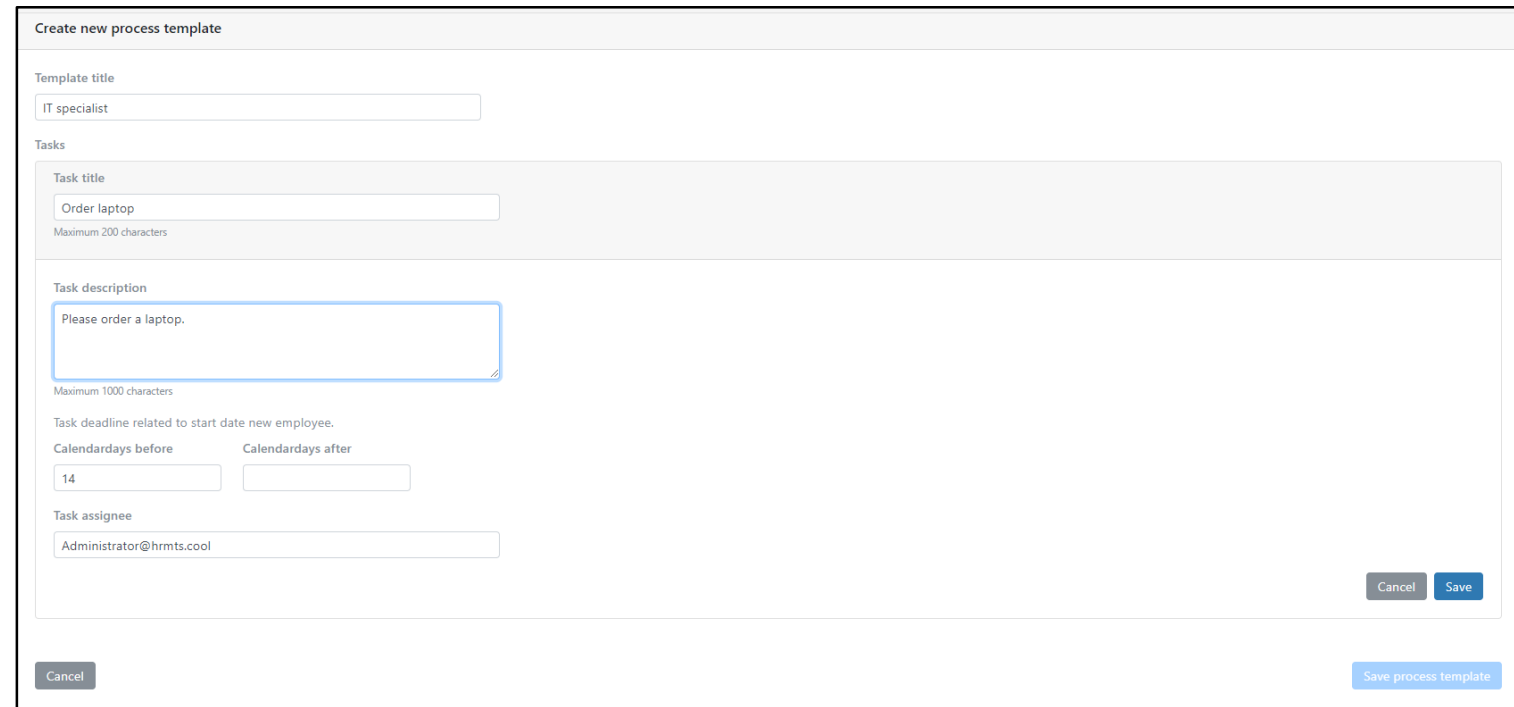
1. Add a task to the process, including a task description, task deadline and task assignee.

- **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 "Template title" field with the value "IT specialist". Below that is a "Tasks" section. The first task has a "Task title" field with the value "Order laptop" and a "Task description" field with the value "Please order a laptop." Below the description field, it says "Maximum 1000 characters". There are two fields for "Task deadline related to start date new employee": "Calendar days before" with the value "14" and "Calendar days after" which is empty. Below that is a "Task assignee" field with the value "Administrator@hrmts.cool". At the bottom left, there is a "Cancel" button. At the bottom right, there is a "Save process template" button and a "Save" button.

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

Internal version





# 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

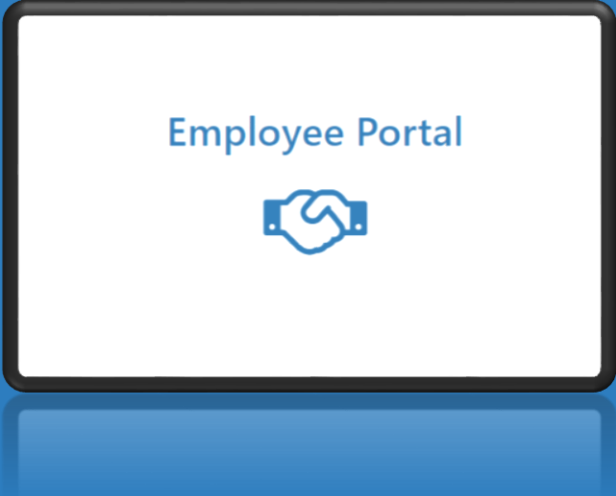
Process name	Number of tasks	Actions
HR Onboarding	5	
IT-specialist	7	 Edit  Copy  Delete
Team leader	7	

+ 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



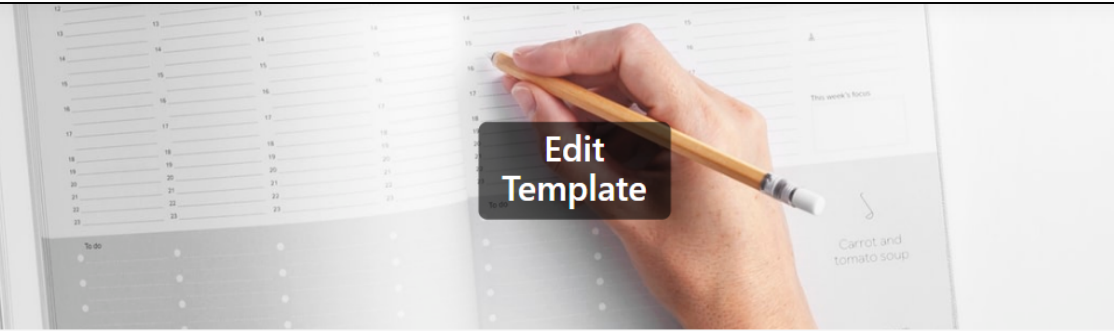
Internal version

# 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.

Internal 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](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.

2017-08-23

Welcome! YO

New hire  
NH Thank you! 😊

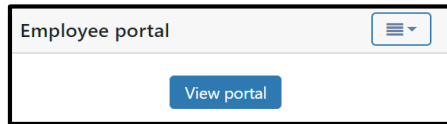
Say something...

[+ Add card](#)

**PREVIEW**

# VIEW AN EMPLOYEE'S PORTAL

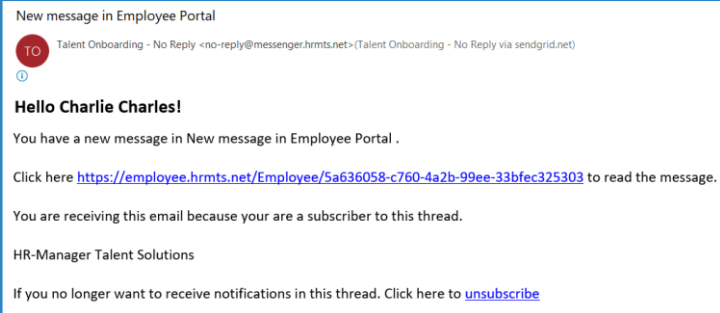
Via Processes → Edit process, you can view the employee's portal.



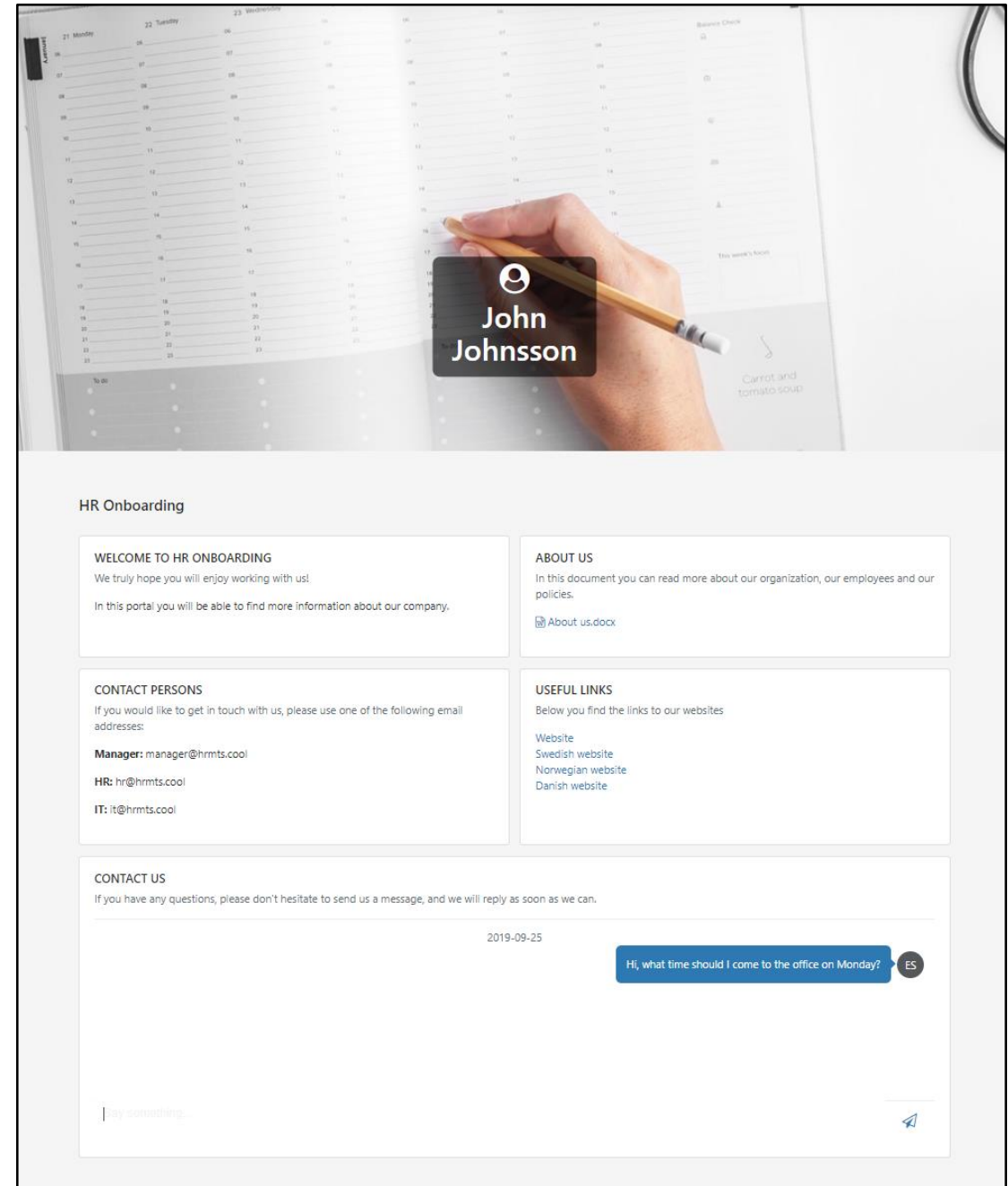
## This allows you to:

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

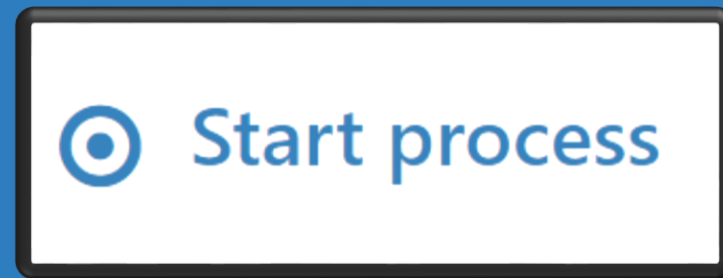
**PLEASE NOTE:** The *process owner*, that started the onboarding process, will get an email if the employee has replied to a chat and vice versa.



Internal version



# START AN ONBOARDING 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**.

## Recruitment system:

Candidate List

All Candidates	Application received	Tests
21 (21)	18	0

[Add new Candidate](#) [View document archive](#)

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**.

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

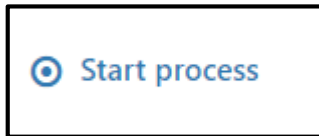
Select process: IT-specialist

Tasks

Access to intranet	Task assignee
Task description: Access to intranet Due date: 16.10.2019	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

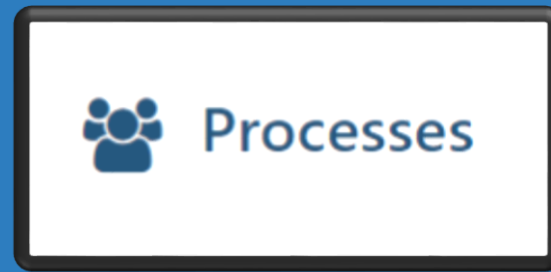
<b>Access to intranet</b>	<input type="text" value="IT@hrmts.cool"/>
Task description	
Access to intranet	
Due date	Task assignee
16.10.2019	IT@hrmts.cool

<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



# PROCESSES OVERVIEW

The screenshot displays a 'Processes' overview page. At the top right, it says 'Processes version 1'. The page is divided into 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, John, Johnsson has a status of 0/7 and Marta, Martas has a status of 3/7. In the 'Completed processes' section, Bo, Boss has a status of 2/2 and Charlie, Charles has a status of 7/7. A dropdown menu is open over the 'Actions' column of the 'Completed processes' section, 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]

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 for managing a new hire. It is divided into two main sections: 'New hire' and 'Tasks'.

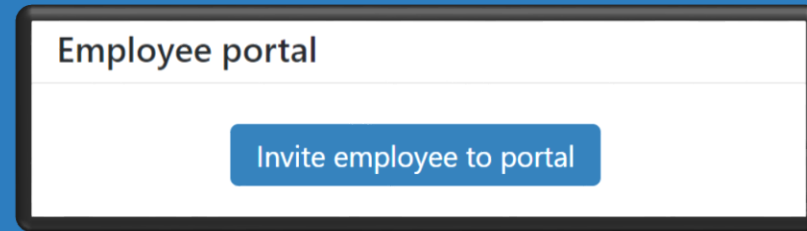
**New hire section:**

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

**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

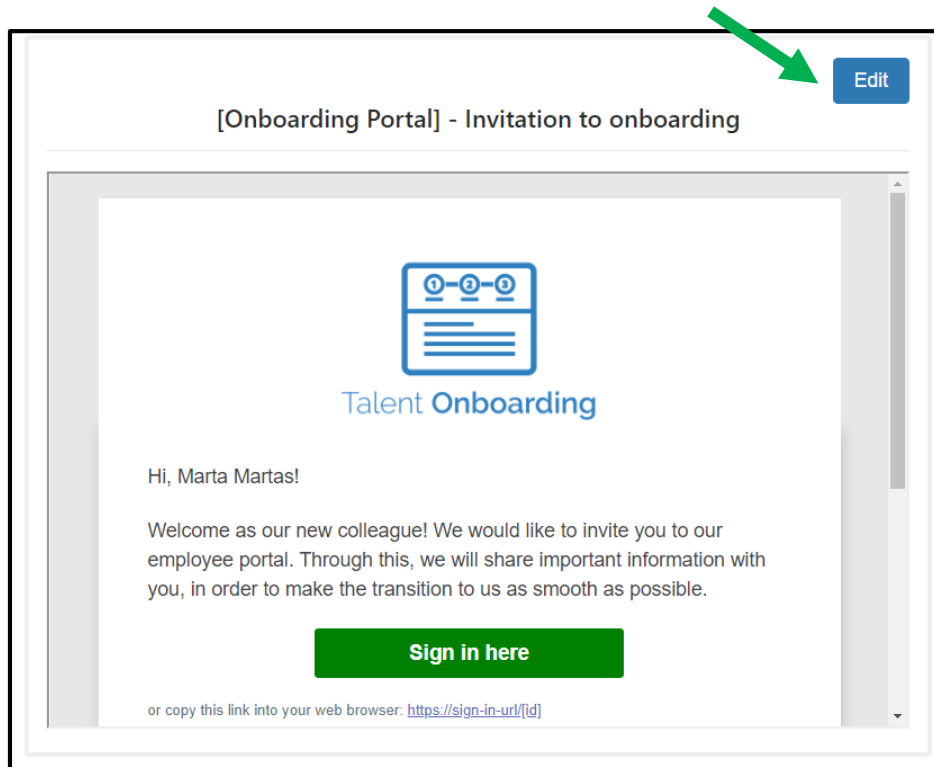


Internal version

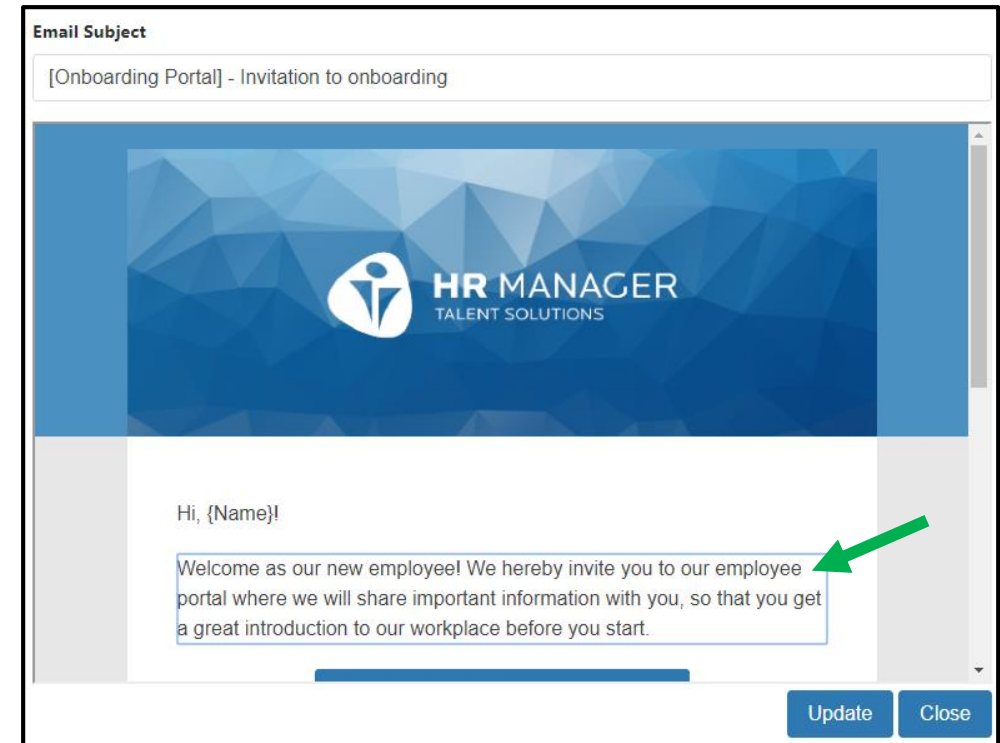


# PORTAL INVITATION TO NEW EMPLOYEES

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.

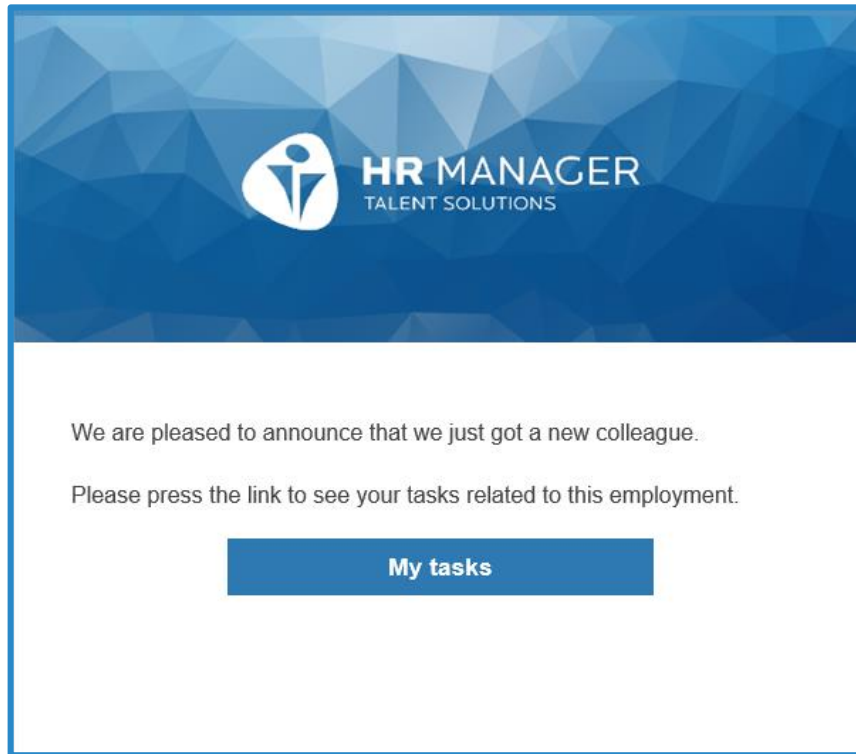
# EMAILS & REMINDERS

Task assignee



# 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 includes a search bar, a "Sort by" dropdown, and three task categories: Active (2), Completed (1), and Canceled (1). Each task card displays the assignee's name, position, department, start date, task description, and due date. A "Mark completed" button is present for each active task. A callout box points to the "Task description" field of a completed task, stating "Click on the description for more details." This callout points to a detailed view of the task description: "Arrange IT course. Book a meeting room, lunch and invite IT Manager that will hold the course."

Task Status	Assignee	Position	Department	Startdate	Task description	Due date
Active	John Johansson	Developer	IT	20.11.2019	Arrange IT course	15.11.2019
Active	Marta Martas	Team leader	IT	26.09.2019	Arrange IT course	21.09.2019
Completed	Charlie Charles	IT specialist	IT department	01.12.2019	Arrange IT course	
Canceled	Oscar Oscarsson	IT Manager	IT Department	26.11.2019	Arrange IT course	

# 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](#)