This is about the onboarding module (purple arrow) - and about ensuring a good introduction for new employees from the moment the contract is signed until they are properly settled in after 3-6 months. But before we can get started with onboarding employees, we just have to set up the system in the way that we want it - and this is done by clicking the cogwheel (red arrow).

Setting up my onboarding process
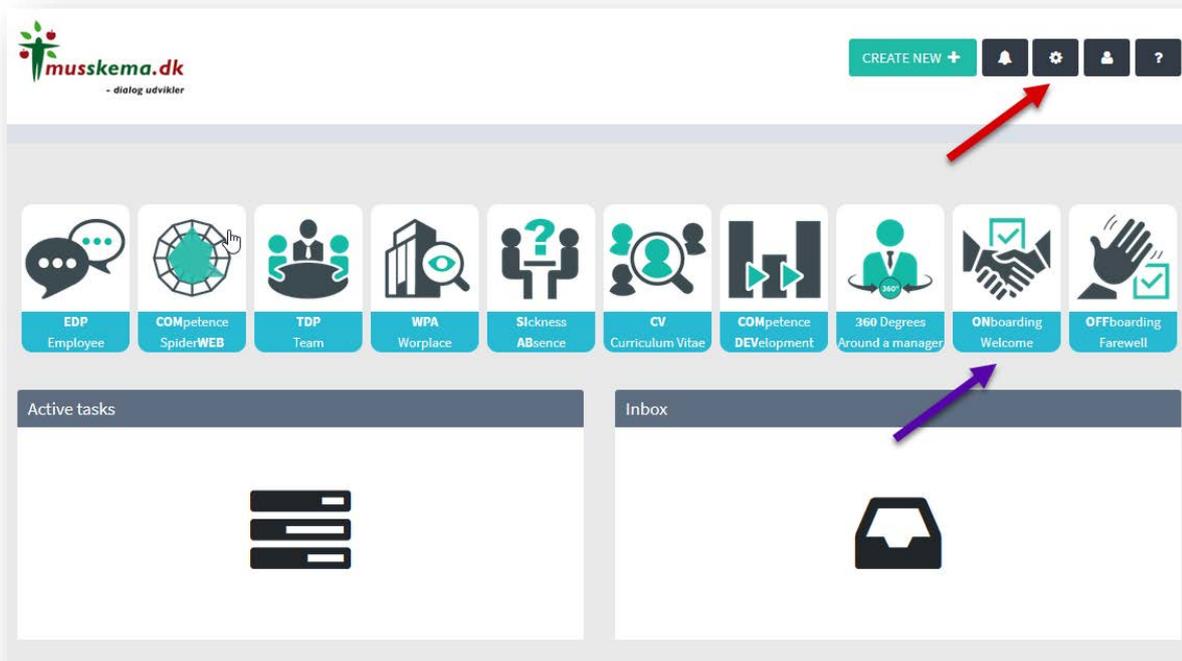
It is possible to go with a single and uniform setup for the entire organisation - or you can run slightly different setups for each department.
If you choose the last one, you can select the department by the green arrow. Otherwise, you will just use the same for the entire organization.

You can also assign certain persons who should always act at some point in the onboarding system (and you can always add to and change them). This could be: an employee/manager from HR, IT, Finances etc., as all of these should have the new employee set up in the systems before he/she begins. Once assigned, they can always go in and click YES for such items as created with mail and codes (from IT) or in the Payroll System (from Finances). The closest manager, who sets it all in motion concerning the new employee, will always be automatically added to this group.

Now, we are going to look into the specific checklists - and questionnaires you want to make use of in the onboarding process, but before that, we should mention that by the dotted green arrow you can insert a selection of onboarding questions from the questionnaires - or you can choose all of them - meaning that the selected questions will form the basis of the total "onboarding score", which will eventually be calculated as a total number for the entire onboarding process: e.g. 4.56. This figure reflects how successful the onboarding process has been.

At the bottom of the same page, you should consider:
- What days something should happen (yellow arrow)
- How many days should be used for finishing what is going to happen (red arrow) - and here you can add a lot of different action points, e.g. day 30, day 75 (shortly before the 3 months trial period is over ...
- And what do we call this part of the process (green arrow)

But now we will have a look at checklists and questionnaires (yellow arrow - 2 figures above):

Here you have the option to create a completely new questionnaire/checklist from scratch (red arrow) - or to edit one of the existing questionnaires:

- Such as the questionnaire for the Day 14 interview (purple arrow) – or the Day 60 interview, and whichever intervals you prefer to use. It appears once you have set up these intervals (see above)
- Checklist for all the individual tasks to be remembered before the new employee arrives - and the first days/weeks thereafter. Here you can also make checklists for different groups of employees, which you choose when you are going to onboard one from this group such as administrative staff, electricians, installers, managers.... Etc.
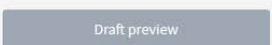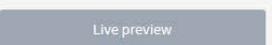
The checklists usually take the shape of to-do lists which should be answered with YES/NO. Please note, that the system is set up so that checklists must be filled in by both sides: By the responsible person from IT, finances, etc. - and by the person who is actually onboarded (the onboardee). E.g. Has received phone – IT says YES, but the onboarded employee says NO. Then, the system will instantly show a message on the dashboard stating that there is a mismatch.

Correspondingly, the manager or department (could be IT) says YES when asked whether a mail account has been created for the new employee in the system. And then, when the employee arrives, he/she answers NO, because he/she has not received a mail account yet... This is also a mismatch which is instantly recognised by the system (see below).

Questionnaires, Day 7, 14 or whatever you want - build up as scored questions 1-6, but also with the option to write a comment:

Once you're done with your checklist and questionnaires - *remember to publish*!
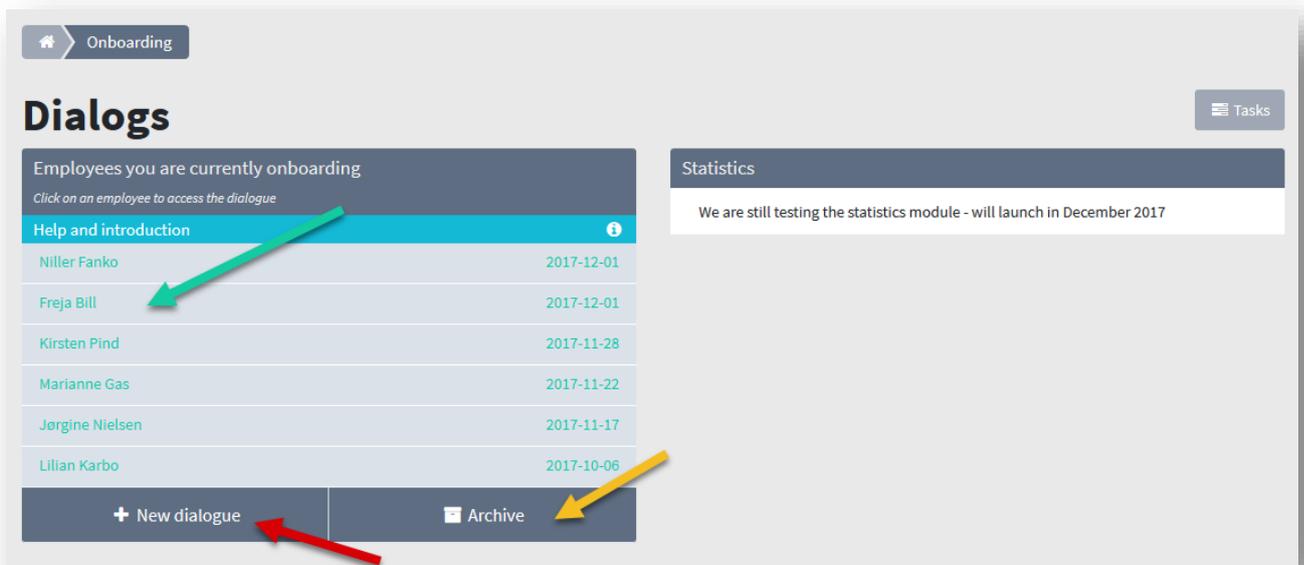
Now the setup itself is complete.

This is when you begin to actually onboard...

Start by clicking the Onboarding icon from the front page (the small arrow in the first figure in this guide).

You will then be taken to this image.
Here you can:
1. Start a new onboarding process (Red Arrow)
2. Edit an ongoing one (green arrow)
3. Search in completed - in the archive (yellow arrow)

Re 1. Start a new onboarding process

Click "New dialogue" (red arrow).
Select a person from the drop-down menu (Purple arrow)
From the calendar icon, select the first day when the onboarding person meets at work.
Then select the checklist/questionnaire that fits the person to be onboarded (if there are more to choose from) - this is done by the yellow arrow.
In the field by the dotted green arrow you can write a personal greeting to the person who is to be onboarded. The first time the person opens his work e-mail, this text will appear!
Click on the dotted yellow arrow - and then Onboarding will run automatically from the day from which it has been set to run...
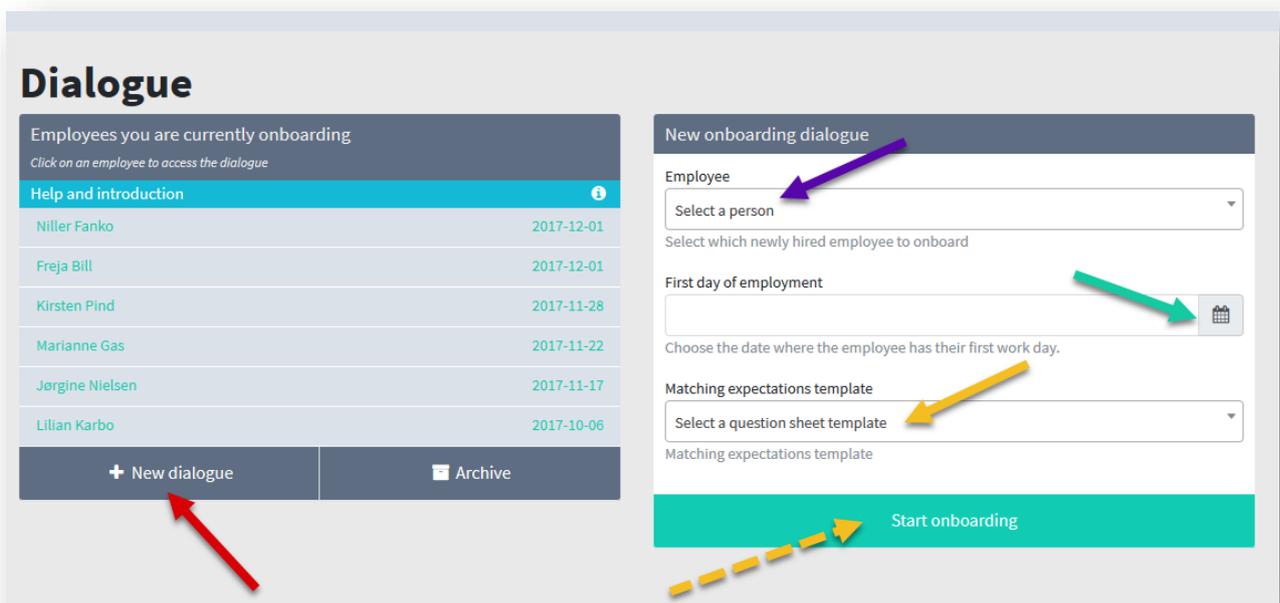
Re 2: Edit an ongoing

By the yellow arrow you can see an overview of the employees who are in some way involved in the onboarding process. This could 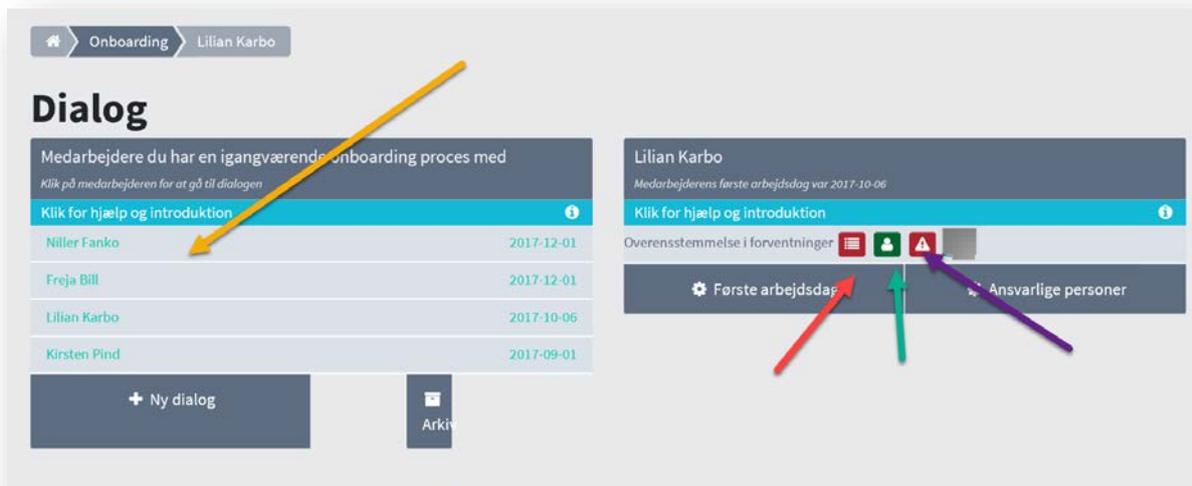be the direct manager, or some other person assigned to deliver some of the things, which the new employee will need: keys, PC, table and chair etc.

Click on one of them - then the image will appear on the right side.
The symbols tell you a little about what you can do and what the status is.

- By the red arrow: Here you will see if the assigned persons have responded to everything on the checklist, which they have to consider.

- By the green arrow: Here you can see if the onboarded person has responded to everything on the checklist that he/she should consider.

- By the purple arrow: As illustrated here with a triangle with an exclamation mark - it is indicated that there are one or more mismatches between what the responsible staff or manager says has been given to the onboardee and what is actually the experience of the onboardee. I.e. if IT believes that they have delivered a PC, but the employee has not received it! Then this triangle with an exclamation mark will appear. And when you hover over the icon with the mouse, it could say that there are 3 expectations that don't match up. Click - and you will see exactly what they are!

Re 3: Generate an overview of how successful the onboarding process has been per team, department, company over time

When you want to generate a "result" of onboarding, you can select a team from a drop-down menu, a department from a drop-down menu - or none = the entire organization.
Click Generate. Then you will see:

- The onboarding score based on the selected questions in the configuration (green arrow)
- Match with expectations - Between Manager/Supplier and Onboardee (Red Arrow)
- The onboarding score in team/department/company over time per quarter (purple arrow)
- Individual onboarding score per team in a department (yellow arrow)
- Individual match with expectations in % between teams (dotted green arrow)

Re 4: Search in completed - in the archive

In the archive you can find completed onboarding processes.