

# Onboarding Tasks for Managers & Delegates

## Introduction

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This guide shows you how to work through new employee onboarding processes.

Each recruitment process has its own onboarding processes that include specific tasks and workflows that determine the task order and timing. New hires are expected to complete learning and other tasks as they begin their new jobs.

As a manager, you need to manage your new hire's onboarding task progress and provisioning. You will also complete onboarding tasks yourself.

## What you will do

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- View new hires
- View new hire tasks
- Manage new hire tasks
- Complete new hire tasks
- Add a task

## View new hires

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Your new hires are shown directly on your dashboard. You can find them and their tasks from the Offers tile.

## When to view new hires

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You can view new hires whenever you have new employees who need to complete onboarding tasks.

## Prerequisites and assumptions

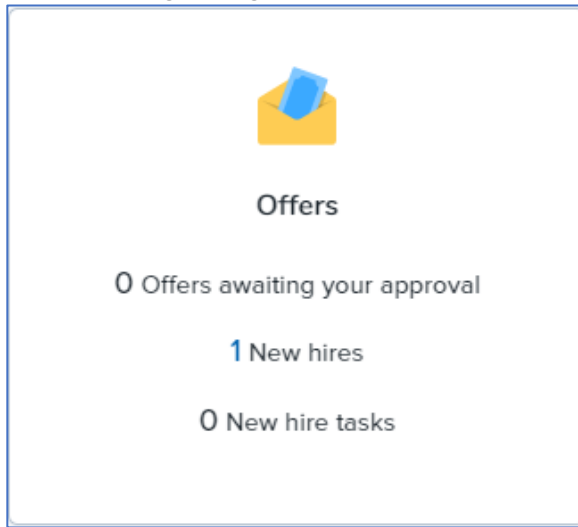
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- You can access the Hiring Manager Dashboard.
- You have been designated as the person the new hire reports to on the offer card.

## How to view new hires

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From the Hiring Manager Dashboard, click **New Hires** on the Offers tile.



The **My New Hires** page opens, showing the following information:

- Applicant name
- Requisition number
- Job title
- Application status
- View offer link
- View tasks link

## What happens next

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- You can view each applicant's offer details.
- You can view each applicant's onboarding tasks.

## View my new hire tasks

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To work with new hire tasks, you work in two pages with slightly different functionality:

- **My new hire tasks** lists all tasks for all of your employees.
- **New hire tasks** shows tasks, due dates, and statuses for a particular employee onboarding workflow.

## When to view new hire tasks

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- You want to find tasks by task name or by employee.
- You want to complete tasks in bulk.

## Prerequisites and assumptions

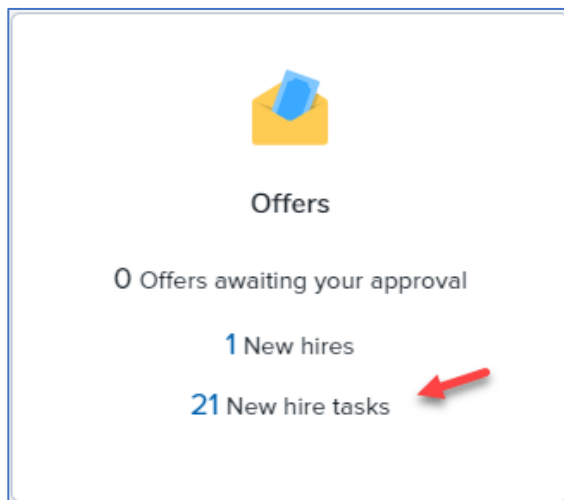
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- You can access the Hiring Manager Dashboard.
- You have been designated as the person the new hire reports to on the offer card.

## How to view new hire tasks

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1. From the hiring manager dashboard, click **New hire tasks** on the Offers tile. **My new hires tasks** page opens, showing tasks for your new hires. **New hire tasks** can also be accessed via the recruiter dashboard and the main menu.



- To find specific tasks, select the employee, task, or both in the **Employee** and **Task** boxes, then click **Search**. The search results show the filtered tasks.

**My new hire tasks**

Employee:

- Arch Nemesis
- Jehosephat Fales

Task:

- Assign any required campus training
- Attend New Employee Orientation
- Check in with Manager
- Check in with your Manager
- Department Orientation/First Day

Clear Search

Select filters

Click Search

Select	Title	Employee	Employee ID	Step due	Hiring manager	Job	Start date
<input type="checkbox"/>	Request Employee Keys	Jehosephat Falk		201	Jonathan Hiring	Professor of Magick and Mysteries	11 Mar 2019
<input type="checkbox"/>	New Employee Introductions	Jehosephat Falk		201	Jonathan Hiring	Professor of Magick and Mysteries	11 Mar 2019
<input type="checkbox"/>	Submit Systems Access Request	Jehosephat Falk		201	Jonathan Hiring	Professor of Magick and Mysteries	11 Mar 2019

Search results display here

## What happens next

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- You can select onboarding tasks to complete in bulk.
- You can **View all tasks** to manage an employee's onboarding workflow.

## Manage new hire tasks

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Use the **New hire tasks** page to do the following activities:

- View all of the tasks for the employee onboarding workflow, including their
  - o Statuses
  - o Due dates
  - o Assignments
- Add and assign new tasks.
- Send update notifications.

## When to manage new hire tasks

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- You want to track a specific employee's progress through the onboarding workflow.
- You need to assign a new onboarding task.

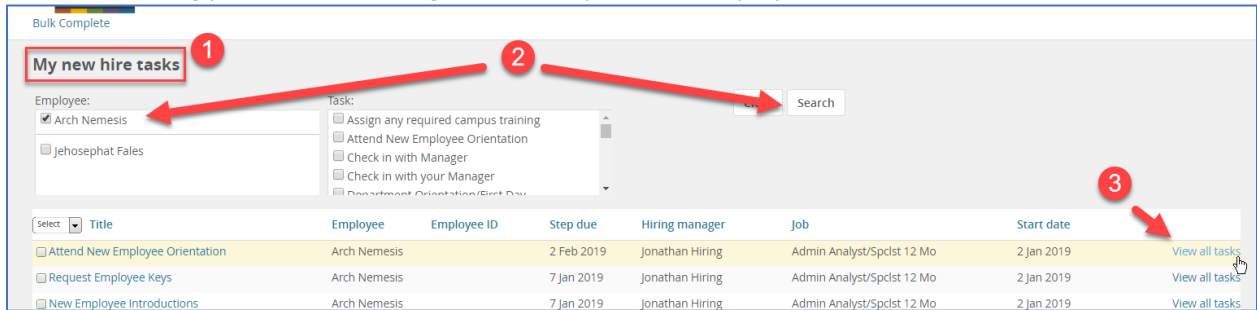
## Prerequisites and assumptions

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- You can access the **My new hire tasks** page.
- You have been designated as the person the new hire reports to on the offer card.

## How to manage new hire tasks

Use the following procedure to manage tasks for a particular employee.

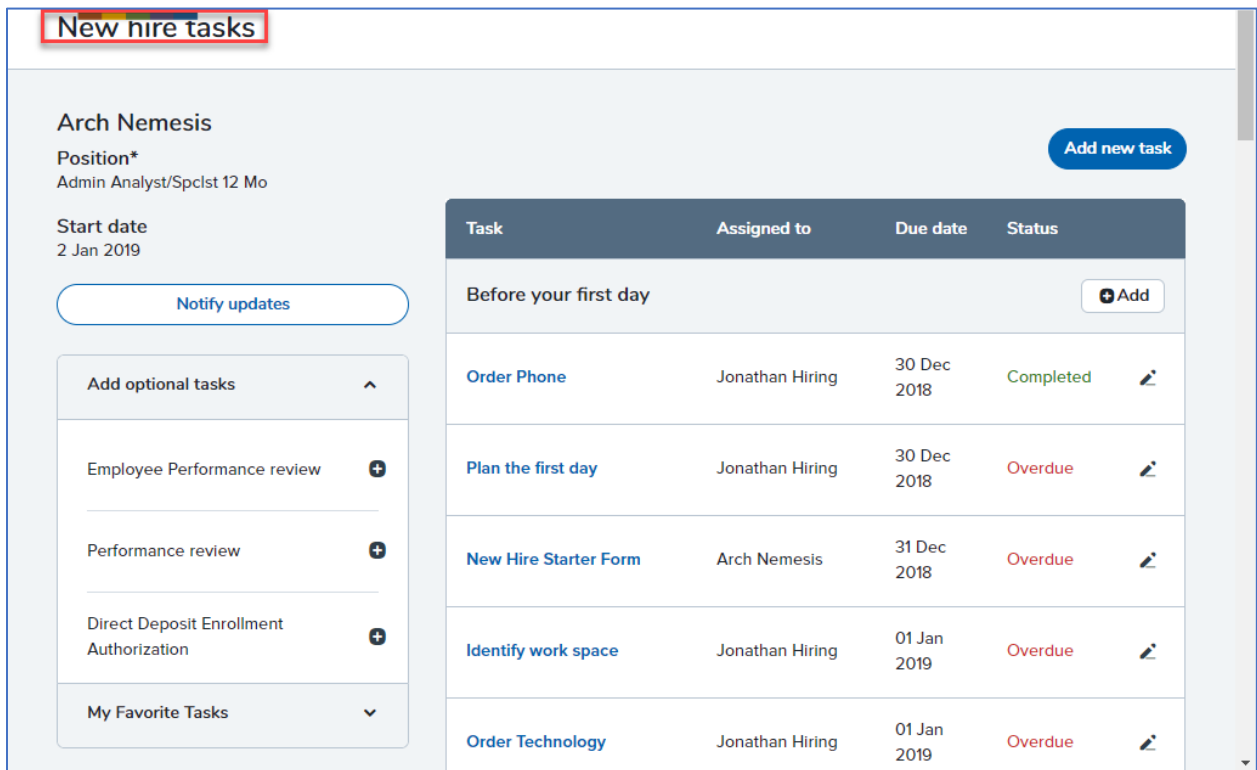


The screenshot shows the 'My new hire tasks' interface. At the top, there is a search area with an 'Employee' dropdown menu and a 'Task' dropdown menu. Below this is a table with columns: Select, Title, Employee, Employee ID, Step due, Hiring manager, Job, Start date, and View all tasks. The table contains three rows of tasks for 'Arch Nemesis'.

Select	Title	Employee	Employee ID	Step due	Hiring manager	Job	Start date	View all tasks
<input type="checkbox"/>	Attend New Employee Orientation	Arch Nemesis		2 Feb 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	View all tasks
<input type="checkbox"/>	Request Employee Keys	Arch Nemesis		7 Jan 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	View all tasks
<input type="checkbox"/>	New Employee Introductions	Arch Nemesis		7 Jan 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	View all tasks

1. Open the **My new hire tasks** page.
2. Select the employee and then click **Search**.
3. Click **View all tasks** in the search returns area.

The **New hire tasks** page opens. From here you can review the task list, including status and due date information.



The screenshot shows the 'New hire tasks' page for 'Arch Nemesis'. The page includes a header with the employee name, position, and start date. Below this is a table of tasks with columns: Task, Assigned to, Due date, and Status. The table contains five rows of tasks.

Task	Assigned to	Due date	Status
Before your first day			
Order Phone	Jonathan Hiring	30 Dec 2018	Completed
Plan the first day	Jonathan Hiring	30 Dec 2018	Overdue
New Hire Starter Form	Arch Nemesis	31 Dec 2018	Overdue
Identify work space	Jonathan Hiring	01 Jan 2019	Overdue
Order Technology	Jonathan Hiring	01 Jan 2019	Overdue

## What happens next

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On the **New hire tasks** page, you can do the following activities:

- Complete tasks.
- Edit tasks.
- Add new tasks.
- Notify the employee about updates to the task list.

## Complete new hire tasks

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You can complete your own tasks or complete tasks on behalf of your employee. Tasks are often done outside the system, but you mark them as completed within CHRS Recruiting.

Tasks often include links, phone numbers, or other information that you use for completing the task.

## When to complete new hire tasks

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Mark tasks as completed after the actual task is finished.

## Prerequisites and assumptions

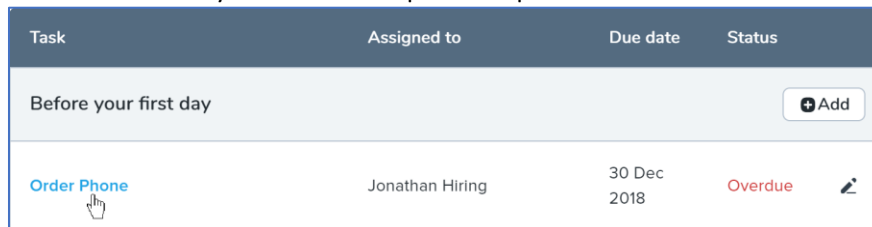
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- The task has been done.
- You can access **New hire tasks**.
- You can access **My new hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.

## How to complete new hire tasks

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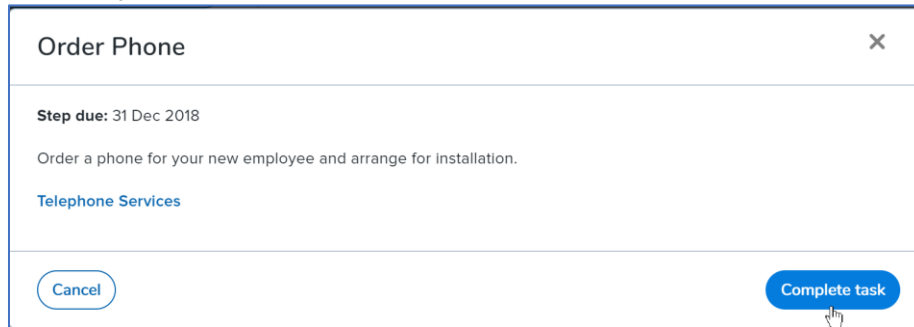
1. Open **My new hire tasks**.
2. Click the task that you need to complete to open the task.



Task	Assigned to	Due date	Status
Before your first day			<a href="#">Add</a>
<a href="#">Order Phone</a>	Jonathan Hiring	30 Dec 2018	Overdue 

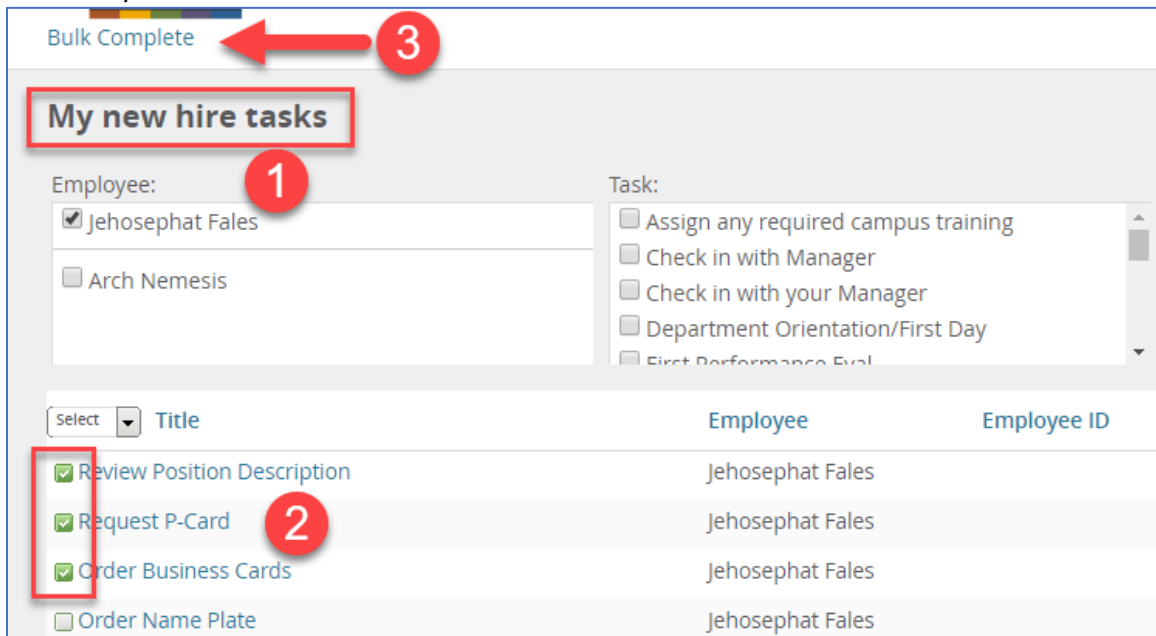
3. Do the task, using any information provided. In this example: ordering a phone.

4. Click **Complete task**.



### How to complete new hire tasks in bulk

If you do several new hire tasks at once, you can complete them in bulk instead of opening each task individually.



1. Open **My new hire tasks**.
2. Select the tasks that you completed.
3. Click **Bulk Complete**.

### What happens next

- The task displays Completed in its status column.
- The task is removed from **My new hire tasks**.

## Add a task

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You can create a task if that task is not included in the onboarding workflow.

### When to add a task

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- The applicant has special needs or requirements.
- You need to assign a task to yourself or another user.

### Prerequisites and assumptions

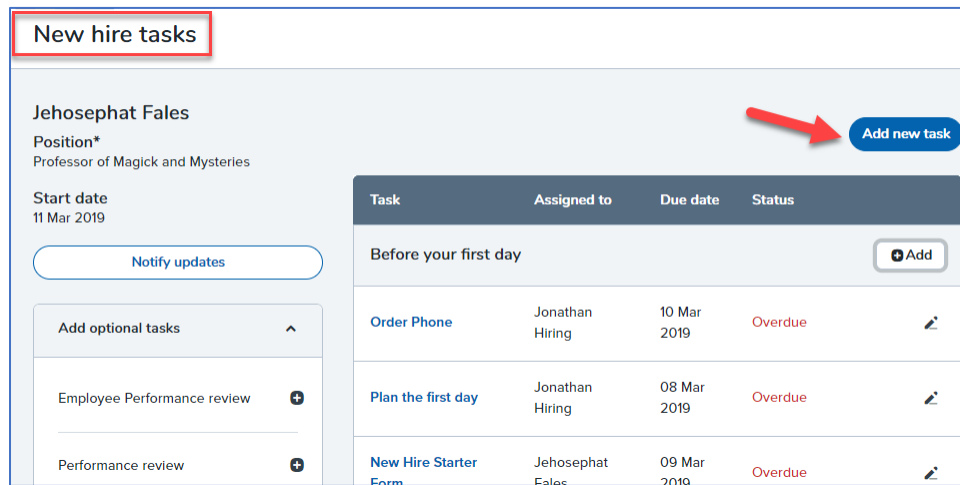
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- You can access **New hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.
- You have permission to add tasks.

### How to add a task

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1. Open **New hire tasks**.
2. Click **Add new task**.

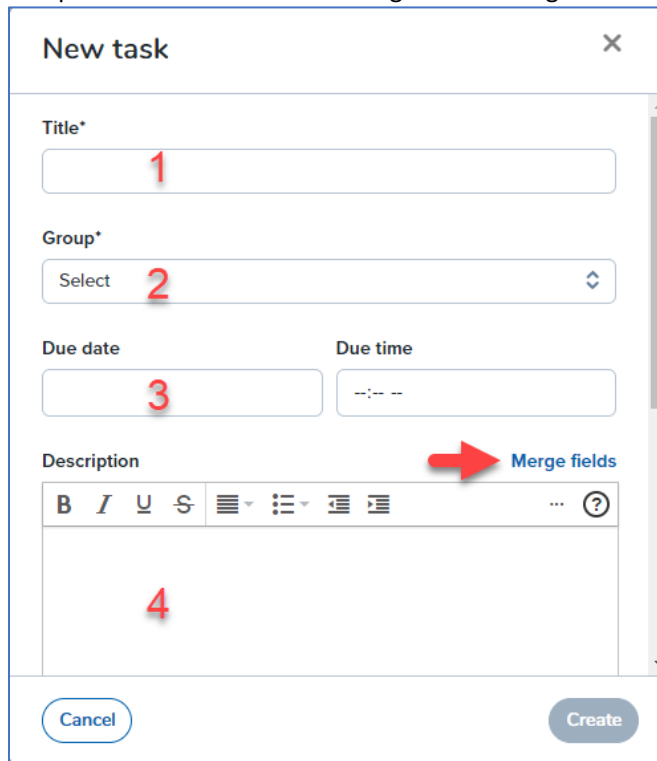


The screenshot shows the 'New hire tasks' interface for Jehosephat Fales. The interface includes a header with the name and position, a start date, and a 'Notify updates' button. Below this is a list of optional tasks, including 'Employee Performance review' and 'Performance review'. The main section displays a table of tasks with columns for Task, Assigned to, Due date, and Status. A red arrow points to the 'Add new task' button in the top right corner.

Task	Assigned to	Due date	Status
Before your first day			
Order Phone	Jonathan Hiring	10 Mar 2019	Overdue
Plan the first day	Jonathan Hiring	08 Mar 2019	Overdue
New Hire Starter Form	Jehosephat Fales	09 Mar 2019	Overdue

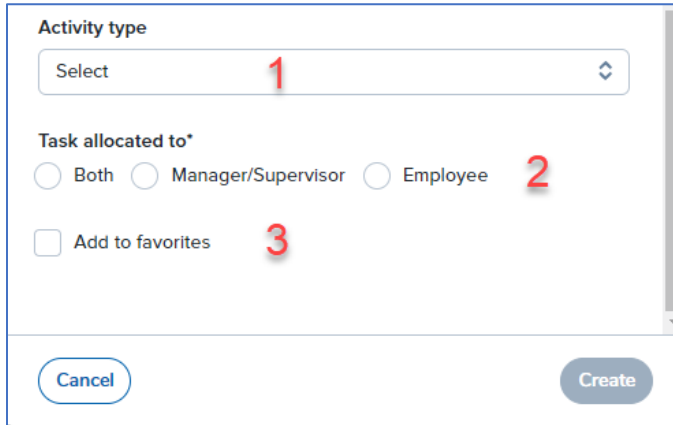


3. Complete the **New task** form using the following screen captures and data.



#	Field	Information
1	<b>Title*</b>	Enter the title of the task. This is a mandatory field.
2	<b>Group*</b>	Which group does the task belong to? Examples: First day, first week. This is a mandatory field.
3	<b>Due date and Due time</b>	Enter the due date and time for task completion.
4	<b>Description</b>	Use the rich text editor to specify what the user needs to do to complete the task. <ul style="list-style-type: none"> <li>• Click the ellipses icon [...] in the toolbar to see more text editing options.</li> <li>• You can include hyperlinks to forms or other resources that the user needs to complete the task.</li> <li>• You can use the <b>Merge fields</b> link to see a list of merge field that you can use for writing the task description.</li> </ul>

4. Scroll down to see the rest of the **New task** window.



The screenshot shows a form titled "Activity type" with the following elements:

- A dropdown menu labeled "Select" with a red number "1" next to it.
- A section titled "Task allocated to\*" with three radio button options: "Both", "Manager/Supervisor", and "Employee". A red number "2" is placed to the right of these options.
- A checkbox labeled "Add to favorites" with a red number "3" next to it.
- At the bottom, there are two buttons: "Cancel" on the left and "Create" on the right.

#	Selection	Information
1	<b>Activity type</b>	This functionality is not used by CSU. Leave this field blank.
2	<b>Task allocated to*</b>	Select the person who does the task. This selection is mandatory.
3	<b>Add to favorites</b>	Favorites are added to <b>My Favorite Tasks</b> on the <b>New hire tasks</b> page.

5. Click **Create**.

### What happens next

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The task is assigned to the user and is displayed in the tasks list.