HR Partner

Onboarding Checklist

Your Guide to Going Live with HR Partner in 14 Days!

PHASE	STATUS	DESCRIPTION	TIME
Getting Started	☐	Book your FREE Onboarding Call - book now, then go through as many of the onboarding steps as you can before the call	5 min + 45 min
	☐	Watch the Video Tutorial for New Admin Users	20 min
	☐	Get to know the HR Partner Knowledge Base	10 min
Basic Setup	☐	Go to Setup > Company Info and Check your Company Name	1 min
	☐	Set the country for your Company	1 min
	☐	Set the timezone (of head office)	1 min
	☐	Upload your company logo	1 min
	☐	Select which Additional Modules to enable or disable	3 min
	☐	Setup your Categories (drop down lists for employee data)	30 min
	☐	Setup your Lists (other drop down lists)	15 min
	☐	Set up Custom Fields (optional)	10 min
Inviting Other Admin Users	☐	Invite other Admin Users to HR Partner	10 min
	☐	Send Admin Users the video tutorial	10 min
Adding Your Employees	☐	Decide to add all employees or do a staggered rollout	10 min
	☐	Choose which method to use to add employees (manual, by importing a CSV, or by linking to an integrated payroll system)	10 min
	☐	Prepare the employee data and add your team to HR Partner	1-4 hours
	☐	Add other key information to the employee records	1-2 hours
	☐	Check that all reporting lines are setup correctly (by viewing the Org Chart)	10 min
Setting Up Time Off / Leave	☐	Configure your Leave Settings	15 min
	☐	Setup your Leave Policies	30 min
	☐	Setup your Work Day Templates	5 min
	☐	Add your Bank and Public Holidays	10 min

Continue Your Onboarding Checklist

PHASE	STATUS	DESCRIPTION	TIME
Setting Starting Leave Balances	☐	Update the starting leave balances for all employees, for all leave policies (either manually or upload a file)	1-4 hr
Creating Your Company Library	☐	Setup the Categories for Your Library	5 min
	☐	Upload files or add links to external files for all initial library files you wish to add'	20 min
Inviting Your Team to the Employee Portal	☐	Decide which cohort of employees to invite first	5 min
	☐	Give your employees some training (use these videos)	1 hr
	☐	Send out invitations to employees	2 min
	☐	Check in with employees to ensure they have; added their contact details, photo, and an introduction / biography, know how to view the employee directory, access the Company Library, and know how to submit Leave Requests	2 hr

Congratulations!

You've made it through the core setup steps! 👏👏👏
You now have your Employee Records online and employees can start submitting leave requests.

Now, it's time to choose which areas and functions you dive into next...

Next Steps (Optional)	☐	Learn how to Communicate with Employees
	☐	Setup Employee Performance Reviews & Goals
	☐	Recruitment - Setup your first job post
	☐	Checklists - Setup an onboarding checklist
	☐	E-Signatures - Setup and send out an e-signature request
	☐	Expense Claims - Setup to receive expense claims from employees
	☐	Custom Forms - Setup a Form for Employees to use (either in a Checklist, by request, or in the Portal)
	☐	Timesheets - Setup a Timesheet template and assign it to employees
	☐	Projects and Costing - Setup the projects and activities you wish to track
	☐	Reports - Create and save a new HR report