

On/offboarding

Support your employees during the onboarding and offboarding processes

Hello!

Welcome to Sesame, the software that simplifies HR management.

In this file, we will explain what you can find in the **“On/Offboarding”** section and how you can install this in your dashboard.

We will take you step by step, so don't worry. We are here to help you with whatever you need!

Content

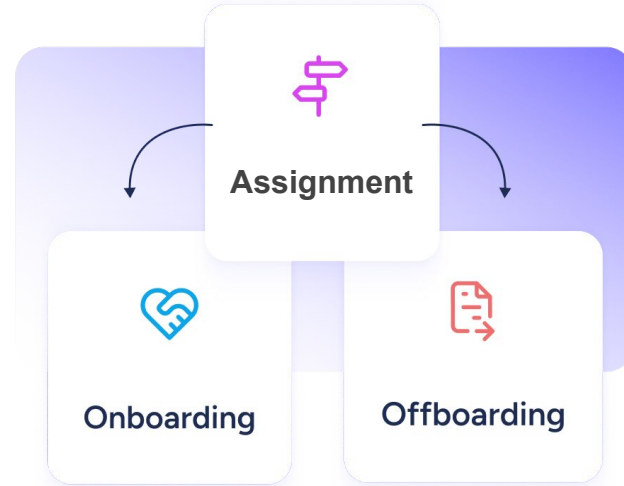
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1. Onboarding and offboarding, why are important?

Support your employees during they arrival and departure from the company is a key to **manage the talent, strengthen the commitment** and **build a positive company** culture.

With **On/offboardings**, you will be able to organize all these processes and create all the necessary tasks to complete them in the best way.

Let's get started!



2. Install the tool

The first thing you need to do, if you haven't already done it, is to **install the On/offboardings functionality**.

In order to do this, access to Sesame dashboard and go to **Applications**, at the bottom left. There, look for **On/offboarding** and click on **"Install"**.

Installation may take a few minutes, be patient!

Once the process is completed, you will be able to see the functionality in the left side panel.

Onboarding

First impressions count: create the best welcome plan for new employees in your company.

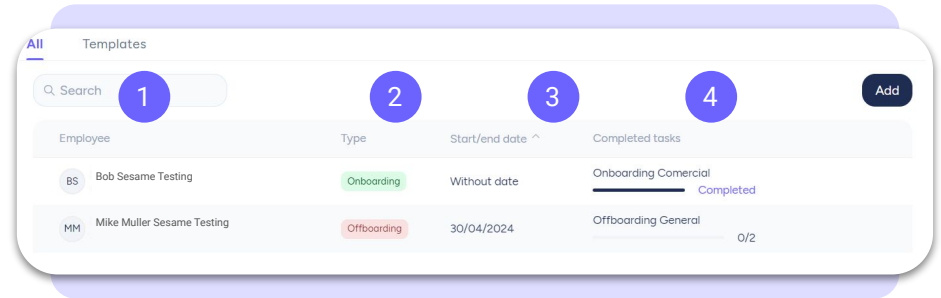
Install

3. Discover the “All” tab

Welcome to **On/offboardings**.

In “**All**”, you will be able to see all the onboarding and offboarding you have assigned, such as:

1. **employees** affected by these flows,
2. **process type**,
3. start or offboarding **date**,
4. a **progress bar** to know how many tasks have been completed or not.



If you don't see the “**All**” tab in your panel, yo will see it when you create an onboarding or offboarding template. dash

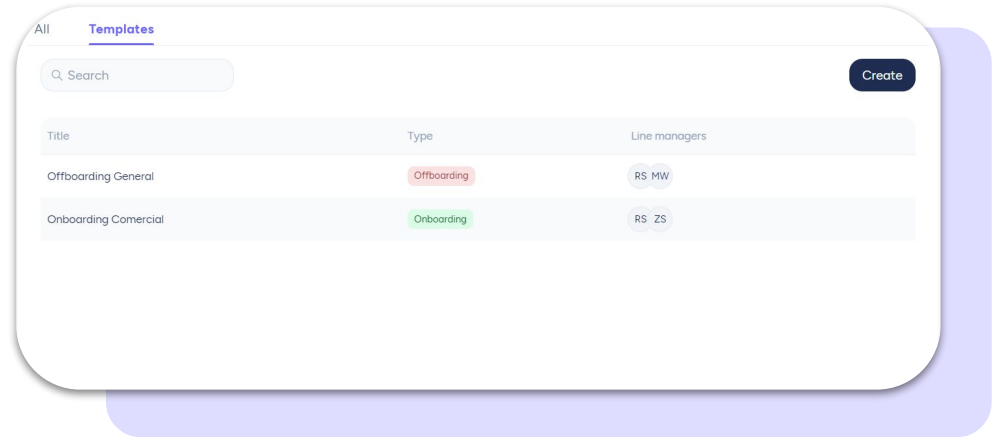
4. Discover the “Template” tab

Do you want to create, edit, duplicate or delete a template?

You can do all these from “**Templates**”. From here, you can also designate the responsible employees for carrying out the on/offboarding tasks.

Did you already have templates? You will find them here, you just need to assign them a category to use them.

Please note that once you have assigned a category to a template, you will not be able to modify it.



5. Create and edit templates

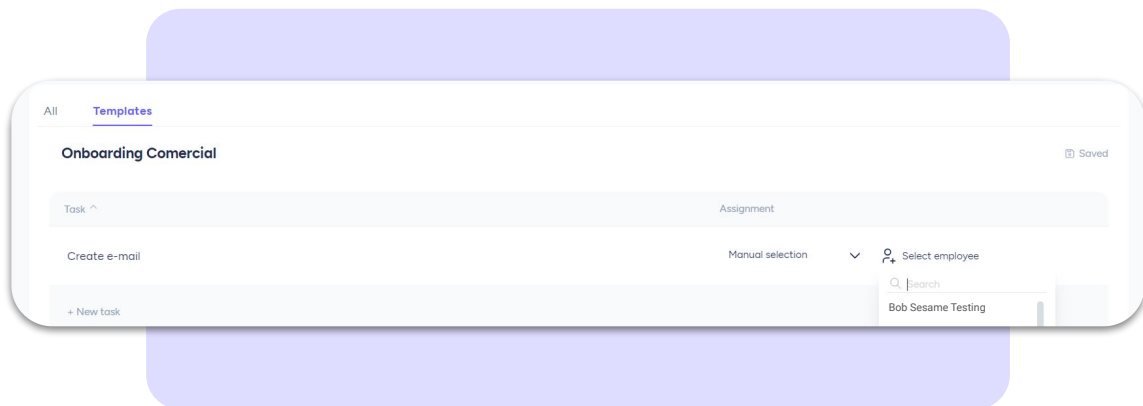
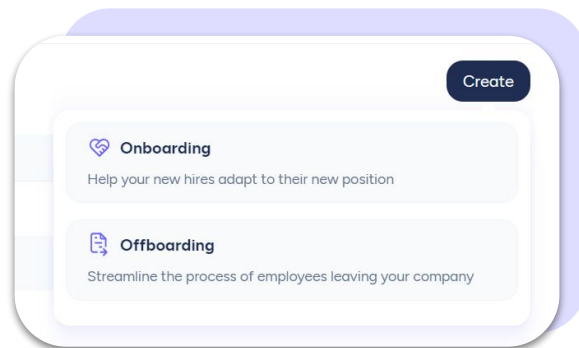
To create a template, go to [Templates >> Create](#).

The first step is to define the **process type** you want to create: onboarding or offboarding.

Once you have done it, the **templates creator** will be open. Write a title to your template, add all the **tasks** that will take part of the process and indicate who will be the **person in charge** for carrying out them.

By default, the **person in charge of the task** will be the person you **assign the on/offboarding**. But if you prefer, you can manually choose another person.

Important! If a task has no a responsible, it will not be completed, because any employee will see it when on/offboarding is activated.



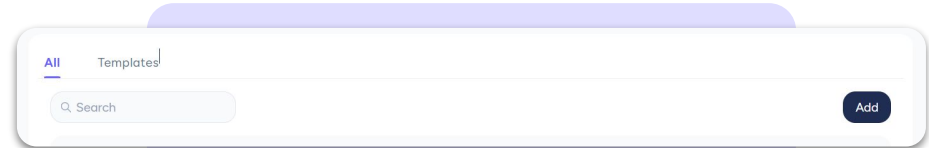
6. Assign templates

Good! You did a great job creating a template!
Let's see how you can **set it up** and **assign it to an employee** who joins or leaves the team.

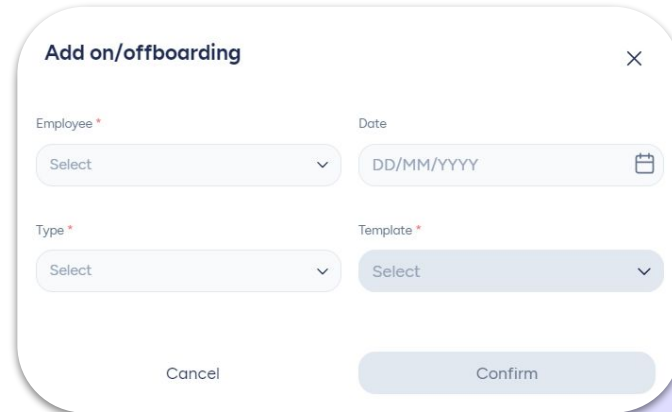
Go to **"All"** and click on **"Add"**. In the next window you will see, select an employee, type, the start date and the template you want to use.

Finally, click on **"Confirm"**.

To assign a template, the employee to whom you assign it has to be **created beforehand**.



A horizontal header bar with a light purple background. On the left, the word "All" is underlined in blue, followed by "Templates!". Below this is a search bar with a magnifying glass icon and the text "Search". On the right side, there is a dark blue button with the word "Add" in white.



A modal window titled "Add on/offboarding" with a close button (X) in the top right corner. The form contains four fields: "Employee*" with a "Select" dropdown menu, "Date" with a text input field containing "DD/MM/YYYY" and a calendar icon, "Type*" with a "Select" dropdown menu, and "Template*" with a "Select" dropdown menu. At the bottom, there are two buttons: "Cancel" and "Confirm".

7. Assign an onboarding when you create a new employee

Make the new hires feel **part of the team from the beginning**.

How can you do it? When you create the profile as employee in Sesame, assign them an onboarding template.

When can you do it? In the last step of the process of creating a new employee, from the Onboarding section.

Ready! The welcome flow **will start** automatically on the **start date**.

The screenshot shows a 'New employee' form with a progress indicator at the top. The progress bar has four steps: 1. Personal data, 2. Employment data, 3. Roles, and 4. Templates. Step 4 is currently selected and highlighted in blue. Below the progress bar, there are three sections: 'Schedule' with a dropdown menu set to 'Select an option', 'Holidays' with a dropdown menu set to 'HR Enterprise Yearly', and 'Onboarding' with a dropdown menu set to 'Select'. The 'Onboarding' section is highlighted with a green border. At the bottom of the form, there are two buttons: 'Go back' and 'Create employee'.

8. Notifications configuration

By default, the system will send an **e-mail** and a **notification via the app** to the person you have designated as responsible for a task.

If you **don't want** that your employees receive an **e-mail** every time you assign them a task, go to **Configuration >> Automations >> Notifications**.

Find and **deactivate the switch** next to "**Notify employees by mail each time they are assigned a new task in an Onboarding or Offboarding process**".

We recommend that you **keep this switch activated** to make sure that all tasks are completed.

- Notify your employees by mail every time a new onboarding is assigned to them.
Set up an automatic email to notify your employees when they are assigned tasks in an onboarding process.
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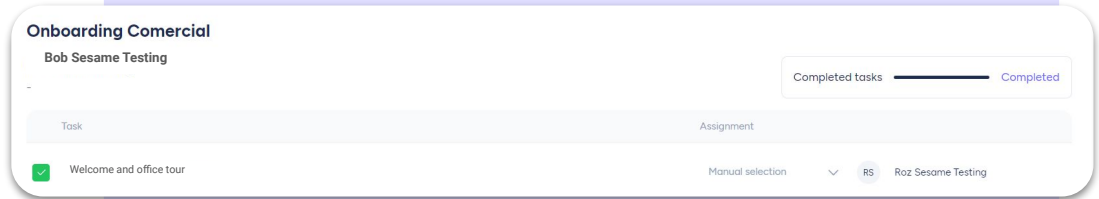
9. Complete the tasks assigned to you

Do you want to **see and complete** the on/offboarding **tasks** you are responsible for?

Access to the list of tasks which have been assigned to you via the **notification** you have received, the **interactive module** in the dashboard or the **lateral menu**.

When you are in, you will see a **list of task** for which you are responsible , as well as details of the progress.

When you want to mark a task as completed, just **click on the verification checkbox** next to the task.



Grow your company. Empower your team!

Do you still have questions? In our [help center](#) you can find many resolved queries. If that's not enough, we'd love to hear from you!

Contact us, we are just one phone call away: [+34 96 062 73 51](tel:+34960627351).

Email us, we will reply as soon as possible: soporte@sesametime.com