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Hiring Department SharePoint On-Boarding Tool Quick Start Guide

SharePoint On-Boarding Overview

Welcome to the SharePoint On-Boarding Tool: <https://sp.ucop.edu/sties/apps/onboarding>

New Employee



Purpose:

The purpose of the On-Boarding SharePoint Tool is to provide a single repository accessible to On-Boarding stakeholders for tracking the On-Boarding of new employees, and promotions and transfers of current employees, so that employees are better positioned to start their new UCOP work experience.

SharePoint Landing Page Contains:

- A link to your Dashboard
- A link to the Script

What You will Use:

- **Your Dashboard** to view open requests and their status

SharePoint On-Boarding Tool Roles and Responsibilities

Human Resources Role:

The HRA will input position information into the SharePoint Tool upon approval of a new employee request. The HRA will also fill out additional information as it becomes known such as Employee Legal Name, etc. HRA will send a link to the Hiring Manager who can view and track the On-Boarding progress of their new employee.

The HRBP and HR Staff have access to view a full dashboard tracking progress of each Service Providers' task and dates under All Active Requests which is sorted by Department and can be viewed through All or Active by HRBP or HRG.

Service Provider Role:

Each Service Provider will fill out their portion of the SharePoint On-Boarding Tool, including dates and comments per the script. The same items currently tracked and completed on the On-Boarding spreadsheet will be completed in SharePoint.

Hiring Department Role:

The Hiring Department has access to view a full dashboard tracking the progress of each Service Providers' tasks and dates of completion for the new hire.

Your Dashboard will contain:

- Details for Active Positions including Request Number and key dates.
- You can click on the Request Number to view the On-Boarding Details.

The Script Contains:

- A step by step process to complete the On-Boarding Form.

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SharePoint On-Boarding Landing Page

The screenshot shows a web browser window displaying the UCOP On-Boarding Site. The page features a navigation menu on the left with options like 'HRA Dashboard', 'Hiring Dept Dashboard', and 'Svc Provider Dashboard'. The main content area includes a welcome message, a description of the system's purpose, and a list of key documents. A 'Script by Role' table is also visible at the bottom.

Welcome to the UCOP On-Boarding Site

This is the application site for UCOP Local HR On-Boarding. It is a tracking system for position requests for new employees and promotions and transfer of current employees.

The system is used primarily by local HR staff and the service providers associated with on-boarding such as Space, ITS, WMC and Payroll.

Here is a description of the links in the left navigation bar:

- HRA Dashboard:** HRAs (HR Assistants) will use this dashboard to manage those requests assigned to them. (Accessible by HR only).
- Hiring Dept Dashboard:** (FUTURE) to view those requests that are assigned to you as a department contact and/or supervisor. (accessible by all UCOP employees).
- Svc Provider Dashboard:** Used by service providers to update requests they are working on (accessible by HR and service providers only).
- All Active Requests:** A summary list of all active requests. This can be used by other HR staff or HRAs in a backup mode (Accessible by HR only)
- Completed Requests:** This contains all completed requests grouped by department. (Accessible by HR only)
- Script:** a detailed listing of the steps in this application for on-boarding an employee (accessible by all)
- Reference Library:** documents related to the system such as guides and system documentation (accessible by all)

Key Docs

Type	Name	Modified
Document	Quick Start Guide - Svc Provider	8/22/2012 9:43 AM
Document	Operational Level Agreements NEW	8/21/2012 4:39 PM
Document	Hiring Department On-Boarding Checklist NEW	8/21/2012 4:38 PM

Script by Role

Order	Title	System(s) Accessed	Comment	Activity
1	Role : HRA (9)			
2	Role : ITS Computers (1)			
3	Role : ITS Phone (2)			

Welcome to the SharePoint On-Boarding Tool: <https://sp.ucop.edu/sites/apps/>

▶ SharePoint On-Boarding Dashboard Sample

The screenshot shows a SharePoint dashboard titled "Hiring Department On-Boarding Dashboard" displayed in a Windows Internet Explorer browser window. The browser address bar shows the URL: <https://sp.ucoop.edu/sites/apps/onboarding/Web%20Pages/Hiring%20Dept%20Dashboard.aspx>. The browser's Favorites bar shows several "Suggested Sites" and an "Inbox" for "siena.carter@gm...". The dashboard itself has a yellow header with navigation links: "Main", "Departments", "Councils and Initiatives", and "SharePoint 2010 Migration". A user greeting "Welcome Siena Carter" is visible in the top right. Below the header, there are tabs for "SharePoint Applications", "ITS Change Mgmt", and "On-Boarding". The breadcrumb trail reads: "SharePoint Applications > On-Boarding > Dashboards > Hiring Dept Dashboard".

The main content area features a "WELCOME ONBOARD" graphic on the left. To its right is the title "Hiring Department On-Boarding Dashboard". Further right is a "Key Docs" section with a table:

Type	Name	Modified
	Quick Start Guide - Hiring Mgrs	8/23/2012 8:43 AM
	Hiring Dept On-Boarding Checklist	8/23/2012 8:43 AM
	Operational Level Agreements	8/21/2012 4:39 PM

Below the "Key Docs" section is a "Position Info" section with a table:

Request No	Employee Legal Name	HRA	Working Title	Start Dt	Offer Letter Sent Dt	Welcome Email Dt
There are no items to show in this view of the "Position Requests" list. To create a new item, click "New item" above.						

Below the "Position Info" section is a "Key Dates" section with a table:

Request No	Employee Legal Name	Space Ready Dt	AD/Email Create Dt	Computer Ready Dt	Phone Ready Dt	Payroll Appt Dt	Badge Appt Dt	iDoc/Timesheet Sent Dt
There are no items to show in this view of the "Position Requests" list. To create a new item, click "New item" above.								

The browser's status bar at the bottom shows "Done", "Local intranet", and a zoom level of "125%".

SharePoint On-Boarding Dashboard High Level Overview

- Dashboards displays differently based on Role.
- Hiring Dept Dashboard will include the position information and key task completion dates.
- You can click on the Request No. to view further Details of the request.
- When the On-Boarding Request Details are updated provided by a Service Provider, it will display on the Dashboard.
- Once all On-Boarding tasks have been completed, the HRA will close out the request and it will be moved to the "Completed Requests" Dashboard (not viewable by Hiring Department).

SharePoint On-Boarding Request Sample

University of California Office of the President

Main Departments Councils and Initiatives

Welcome Dede Bruno (Contractor)

SharePoint Applications ITS Change Mgmt Portal Onboarding Site Actions

SharePoint Applications > Onboarding > Position Requests > New Item

Position Requests: New Item

OK Cancel

Attach File Spelling... * indicates a required field

*****HR*****

Request No * 20120199
number from CATS system

Onboarding FAU(s) M-721721-69085-01
Enter one or more Onboarding FAUs associated with this onboarding request.

HRBP * Siena Carter
The HR Business Partner assigned to this request.

HRA * Dede Bruno (Contractor)
HR Assistant assigned to this request

HRG * Kimberly King
HR Generalist assigned to this request

Department Name * Information Technology Svcs

Dept Contact * Hank Moreira

Supervisor Patrick Rogers

Payroll Title * PA3

Working Title * Programmer Analyst

Salary Grade * T4

Appt Type * Staff - Career

Position Opened Dt 6/6/2012

*****SPACE*****

Building Location * Franklin

Done Local intranet 100%

SharePoint On-Boarding Form High Level Overview

When the On-Boarding Form is updated with date information, it will display in the Request details.

SharePoint On-Boarding Script Overview

SharePoint Applications > Onboarding > Script

Order	Title	Role	System(s) Accessed	Comment
Activity : 1: Creation (2)				
01	Click the "New" button in the Position Selector Web Part	HRA	HR Dashboard	When the "new" button is clicked, the Onboarding Form will appear for the HRA.
02	Input at least the required columns and click the "OK" button to save	HRA	HR Dashboard	Most data is currently manually input from the CATS System. Input at least the required columns indicated by a red asterisk. Note: Onboarding FAU(s) may need to be obtained from the Department Contact.
Activity : 2: Space (3)				
03	Receive SharePoint alert that the position request has been created. Click the link to the request in the email alert.	Space	Outlook	Alert sent within 5 minutes
04	Edit the request and input dept contact date and space requirements into the appropriate columns and click the "OK" button	Space	Svc Provider Dashboard	Space contacts Dept rep separately to obtain space requirements.
05	Edit the request and input space number and Space Ready Dt	Space	Svc Provider Dashboard	This may be combined with previous step if no work is required for the space. Space Ready Dt should be input as soon as the space is ready.
Activity : 3: Hiree/Onboarding - HR (5)				
06	Edit the request and input Hiree Information	HRA	HR Dashboard	After hiree has been identified; dates will be entered at different times as information is known/becomes available.
07	Edit the request and input Computer information	HRA	HR Dashboard	Complete Svc Now Request
08	Edit the request and input Office Phone Information	HRA	HR Dashboard	Complete Svc Now Request
09	Edit the request and input Badge information	HRA	HR Dashboard	Complete iRequest
10	Edit the request and input Payroll information related to the appointment	HRA	HR Dashboard	Payroll dates may be entered at different times dependent on when tasks are started/have ended.
Activity : 4: Onboarding - Svc Providers (4)				
11	ITS Computers receives alert and inputs completion dates when ready	ITS Computers	Svc Provider Dashboard; Outlook	Alert sent within 5 minutes of the Computer Svcs Request Date being saved.
12	Edit the request and input the phone information.	ITS Phone	Svc Provider Dashboard	
13	Edit the request and input the badge appointment information.	WMC	Svc Provider Dashboard	
14	Edit the request and input Payroll completion dates	Payroll	Svc Provider Dashboard	
Activity : 5: Cell Phone (2)				
15	Edit the request and input Cell Phone Information	HRA	HR Dashboard	Infrequently used
16	Edit the request and input Cell Phone Completion Dates	ITS Phone	Svc Provider Dashboard	Infrequently used
Activity : 6: Close (1)				
17	Close out the request by updating the Status column to "Complete".	HRA	HR Dashboard	This step removes the request from the Active area of the Dashboards and sends an alert to mailroom.

SharePoint On-Boarding Script High Level Information:

- The SharePoint On-Boarding Script provides a step by step guide to completing the SharePoint On-Boarding Process.
- The SharePoint On-Boarding Script only contains On-Boarding activities that are tracked in SharePoint. Please note that some On-Boarding activities and processes occur outside of the SharePoint Tool.
- The SharePoint On-Boarding Script:
 - Lists tasks by Activity
 - Displays the system used for the task
 - Displays the role responsible for completing the task
- The SharePoint On-Boarding Script is crisp, concise and syncs with the key tasks and dates that are being tracked in the SharePoint predecessor, the HR On-Boarding Spreadsheet.



The New SharePoint On-Boarding Process is crisp, concise, and