Hiring Department SharePoint On-Boarding Tool
Quick Start Guide

SharePoint On-Boarding Overview

Welcome to the SharePoint On-Boarding Tool: [https://sp.ucop.edu/sites/apps/onboarding](https://sp.ucop.edu/sites/apps/onboarding)

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

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 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 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 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