Version 1

SharePoint On-Boarding Tool

Hiring Department SharePoint On-Boarding Tool Quick Start Guide

SharePoint On-Boarding Overview

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

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

> Link to SharePoint On-Boarding Tool

- > On-Boarding Tool Purpose
- > On-Boarding Tool Roles
- > Landing Page Information
- > Dashboard Information
- > Script Information

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.

Inside this issue:					
Landing Page	2				
Dashboard	3				
Request Details	4				
Script	5				

SharePoint On-Boarding Landing Page

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HRA Dashboard	SharePoint Applications > On-Boarding		
Hiring Dept Dashboard	Welcome to the UCOP On-Boarding Site	Key Docs	
Svc Provider Dashboard	3025-0299	Type Name	Modified
All Active Requests	This is the application site for UCOP Local HR On-Boarding. It is a tracking system for	Quick Start Guide - Svc Provider	8/22/2012 9:43 AM
Completed Requests	employees.	Operational Level	8/21/2012 4:39 PM
Lists	The system is used primarily by local UD staff and the service providers associated	Hiring Department On-Boarding	8/21/2012 4:38 PM
Reference Library	with on-boarding such as Space, ITS, WMC and Payroll.	Checklist I NEW	
 Script 			
 SharePoint Changes 	Here is a description of the links in the left navigation bar:		
Metrics List	HRA Dashboard: HRAs (HR Assistants) will use this dashboard to manage those requests assigned to them. (Accessible by HR only).		
Recycle Bin	 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: occuments related to the system such as guides and system documentation (accessible by all) 		
	Script by Role •		
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Welcome to the SharePoint On-Boarding Tool: <u>https://sp.ucop.edu/sites/apps/</u>

SharePoint On-Boarding Dashboard Sample

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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 Dn-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

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	HRA *	Dede Bruno (Contractor) HR Assistant assigned to this request	8,/ 11	
	HRG *	Kimberly King HR Generalist assigned to this request	۵/ 🗓	
	Department Name *	Information Technology Svcs		
	Dept Contact *	Hank Moreira	8 ₁ / 🛄	
	Supervisor	Patrick Rogers	8 ₁ 🗓	
	Payroll Title *	PA3		
	Working Title *	Programmer Analyst		
	Salary Grade *	T4		
	Appt Type *	Staff - Career		
	Position Opened Dt	6/6/2012		

	Building Location *	Franklin 💌		

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

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Activity : 6: Close (1) If Close out the request by updating the Status column to HRA HR Dashboard This step removes the request from the Active area of the Dashboards and sends an alert to mailroom.		16	Edit the requ	est and input Cell Phone Completion Dates	ITS Phone	Svc Provider Dashboard	Infrequently used
17 Close out the request by updating the Status column to HRA HR Dashboard This step removes the request from the Active area of the Dashboards and sends an alert to mailroom.			y : 6: Close (1)				
		17	Close out the "Complete".	request by updating the Status column to	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 Share-Point. Please note that some On-Boarding activities and processes occur outside of the SharePoint
- 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.

Tool.



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