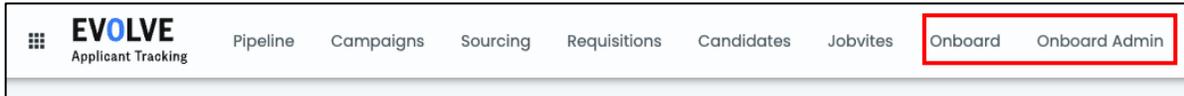


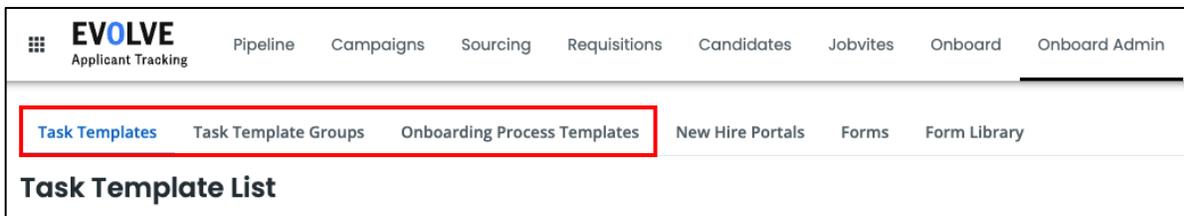
Bulk Onboarding New Hires

Customers who hire in bulk can utilize the Bulk Onboarding feature. This feature allows for the ability to begin the onboarding process for new hires in a bulk format, as opposed to starting the onboarding process for each new hire individually. Users will operate this functionality in two tabs: **Onboard** (Recruiters & Hiring Managers) and **Onboard Admin** (Admins).



The **Onboard** tab is where Orchestrators (Recruiters & Hiring Managers) can turn on the bulk selection in the New Hire list. This enables the Orchestrators to select multiple new hires at once for Bulk Onboarding.

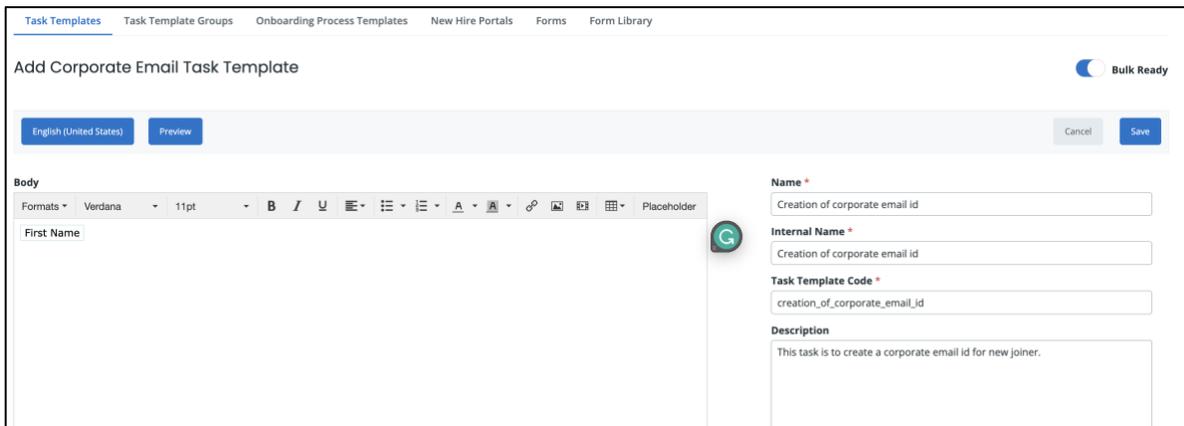
The **Onboard Admin** tab is where the Onboard Admin configures the complete setup to begin the onboarding process. Functions within this tab include **Task Templates**, **Task Template Groups**, and **Onboarding Process Templates**.



Each of these tabs has been modified to allow their specific templates to be bulk enabled, denoted by the **Bulk Ready** toggle in the upper right corner.

Create Onboarding Template with Bulk Hire

To create a new task template, click **+ New Template** in the top right corner of the *Task Templates* tab. Select the necessary information, then click **Create**.



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The Bulk Ready toggle will be available on the upper right screen. By default, the slider is disabled meaning that the template can only be used for individual onboardings until the option is enabled. Toggle on **Bulk Ready**.

Enabling the Bulk Ready status brings certain field validations into the individual templates. This prevents the orchestrator from getting blocked from continuing the onboarding process.

The following fields are updated for the Bulk Ready task template:

- **Default Assignee** - Required
- **Due Date** – Required
- **Inclusion Criteria** – Set to *Always include*, cannot be changed
- **Define Dependencies** – Set to *Independent task*, cannot be changed

Enter the relevant details. Click **Save**.

The new Template can be found in the List on the template tab. A new column, *Bulk Ready* is added on the list page, which indicates **Yes** for the Bulk Ready template, and **No** for the Individual template.

Internal Name	Bulk Ready	Type	Due Date	Default Assignee	Groups/Processes	Status	Updated	Author
1 New hire document uplo...	Yes	Document Upload Task	Start Date	New...	0/0	Active	08/10/2023	Nidhi Admin
2022 Alberta Personal Tax...	No	Form Task	No due date selected	No as...	0/0	Active	09/13/2022	Nidhi Admin
2023 Alberta Personal Tax...	No	Form Task	No due date selected	No as...	0/0	Active	04/17/2023	Nidhi Admin

Bulk Ready Task Template Group

Similar to the Bulk Ready Task template, the Bulk Ready Task template group can be created by clicking **+ New Task Group Template** from the list page.

By default, this would open with *Bulk Ready* disabled. First, enable the Bulk Ready toggle to start creating the Bulk Ready template group.

IT group task
Created: 08/10/2023 by Nidhi Admin Updated: 08/10/2023 by Nidhi Admin

Active
Current status

Bulk Ready

English (United States) [Cancel] [Save]

Task Template Name	Description	Status	Actions
Policy review task		Active	[Add] [Remove]

Groups (0) [Add Group]

Name *
IT group task

Description
This group task template is for activities related to IT support during onboarding.

When a user clicks **Add Task** and **Add Group**, the list of only Bulk Ready templates will display. This ensures that there is a clear match between bulk-to-bulk and individual-to-individual templates.

Enter the relevant details. Click **Save**.

The new Template group can be found on the list page. A new column, *Bulk Ready*, is added, which indicates **Yes** for the Bulk Ready template group, and **No** for the Individual template group.

Name	Bulk Ready	Tasks	Groups	Used in Groups	Used in Process Templates	Author	Status	Updated
Admin Task - German	No	3	-	-	1	Nidhi Admin	Active	09/07/2022
Complete Document upload	Yes	1	-	-	-	Nidhi Admin	Active	08/10/2023
IT group task	Yes	1	-	-	-	Nidhi Admin	Active	08/10/2023
IT task group	No	1	-	-	1	Nidhi Admin	Active	08/10/2022

Bulk Ready Process Template

The Bulk Ready Process Template can be created by clicking **+ New Onboarding Process Template** from the list page.

By default, the page would open with *Bulk Ready* disabled. First, enable the Bulk Ready toggle to start creating the Bulk Ready Process template.

If the New Hire Corporate Account checkbox is selected, it will display the list of only Bulk Ready Corp email tasks.

Orchestrator is a required field during bulk creation.

When a user clicks **Add Group** and **Add Task**, it fetches the list of only Bulk Ready templates.

Enter the relevant details. Click **Save**.

New Onboarding Process Template

English United States | Preview / Order | Cancel | Save

Bulk Ready

Task Group Name	Description	Status	Actions
Complete Document upload		Active	🔒 🗑️

Task templates (3)

Task Template Name	Description	Status	Actions
Bulk Corp email task	This template is for bulk processing.	Active	🔒
1 New hire document upload		Active	🔒 🗑️
Policy review task		Active	🔒 🗑️

Name *
Seasonal hiring process

Description
This process template is for seasonal hires.

956 characters left

Corporate account
 New Hire will have a corporate account

Bulk Corp email task ✕

Portal *
Select Portal

Status *
Active

Orchestrator
Nidhi Admin

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Once all of the settings for the onboarding templates are configured and set up, the orchestrator will begin the bulk onboarding experience by navigating to the **New Hires** tab within *Onboard* where a list of new hires will be displayed. By default, new hires are sorted into one of three statuses for individual onboarding: *New*, *Draft*, or *Abandoned*.

When the Bulk Ready toggle is enabled:

- The individual start buttons next to each new hire name become inactive
- The New Hire list is filtered and only displays records in *New* or *Abandoned* statuses
- When no record is selected, **Start Bulk Onboarding** will remain disabled

The screenshot shows the 'New Hire List' interface. On the left, there are filters for Search Content, Workflow Status (New, Draft, In Process, Completed, Abandoned), Location, and Subsidiary. The main table lists five new hires. The 'Bulk Ready' toggle is disabled, and the 'Start Bulk Onboarding' button is inactive.

New Hire Name	Job Title	City/State	Created	Start Date	Preferred Language	Actions
Bridget Little	General Application	New Jersey New Jersey	07/12/2023	-	New	Start
Collin Nicholas	HR Manager	-	07/12/2023	-	New	Start
James W	Cloud engineer	-	02/07/2023	07/01/2023	Abandoned	Start
Jim Davis	Director Product Marke...	Maynard Massachusetts	07/12/2023	07/31/2023	New	Start
Sai Test	Analyst	san mateo California	07/12/2023	07/31/2023	New	Start

Select at least one record (or multiple/all) to enable **Start Bulk Onboarding**.

The screenshot shows the 'New Hire List' interface with the 'Bulk Ready' toggle enabled. The 'Start Bulk Onboarding' button is now active. The table rows are selected with checkboxes.

New Hire Name	Job Title	City/State	Created	Start Date	Preferred Language	Actions
<input checked="" type="checkbox"/> Bridget Little	General Application	New Jersey New Jersey	07/12/2023	-	New	Start
<input checked="" type="checkbox"/> Collin Nicholas	HR Manager	-	07/12/2023	-	New	Start
<input checked="" type="checkbox"/> James W	Cloud engineer	-	02/07/2023	07/01/2023	Abandoned	Start
<input checked="" type="checkbox"/> Jim Davis	Director Product Marke...	Maynard Massachusetts	07/12/2023	07/31/2023	New	Start
<input checked="" type="checkbox"/> Sai Test	Analyst	san mateo California	07/12/2023	07/31/2023	New	Start

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If the Orchestrator wants to select more New Hire records on the next page(s), click the arrows to move between pages and select the desired records. Once the selection is done, click **Start Bulk Onboarding**.

Next, the *Bulk Ready Process Template* popup will display a list of Bulk Ready process template(s). The orchestrator can choose the desired process template and enter the start date. This Process Template and the Start Date will become applicable for each of the selected New Hires.

Click **Next**.

Name	Description	Language
Seasonal Hires...	-	English (United States)

The next screen contains a tabular format of the information gathered for each new hire, as well as their Hiring Manager, Recruiter, Job Title, and Hire Date. The table also has five columns along the top that inform the user of the Onboard Process Template, the Orchestrator, the Watchers, the Start Date, and the Onboarding Completion date.

Certain information along the top of the table can be changed by clicking the column title where the Orchestrator and Watchers can all be edited; however, the Start and Completion Dates are non-flexible. Scrolling down the screen presents the list of tasks assigned to the New Hires as part of the Process Template. Due to this being a Bulk Onboarding Process, none of the blocks are present as the information required for them has already been filled out.

After the Orchestrator is completely satisfied with the setup on the Onboarding process, click **Bulk Onboard Now**. This will move each selected New Hire to the *All Onboardings* tab.

An email notification will be sent to all assignees. This will continue to work in the existing way without any changes.

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[Jobvites](#)
Search

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[New Hires](#)
[Watched Onboardings](#)
[Watched Tasks](#)
[My Tasks](#)
[My Portals](#)

Bulk Onboarding

OB process
 Seasonal Hires process

Orchestrator
 Nidhi Admin

Watchers
 Hiring Manager

Start date: 08/21/2023
 Completes Onboarding: 08/21/2023

New Hire Name	Supervisor	Recruiter	Job Title	Hire date
Bridgely Little	Collin Nicholas		General Application	-
Collin Nicholas	Samuel HM	Arun Kumar	HR Manager	-
James W			Cloud engineer	-
Jim Davis	Jason Yu		Director Product Marketing	07/20/2023
Sai Test	Henry HM		Analyst	07/06/2023

List of tasks
 Due 08/21/2023

Task name
 Bulk Corp email task