Human Resources Cloud

Set up an onboarding journey

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1 Set up an onboarding journey

Overview of onboarding journey setup

Use journeys to set up onboarding activities for new hires. Journeys help you assign tasks, define responsibilities, and track progress throughout the onboarding process.

For example, you can use journeys to help new hires:

- Confirm personal information
- Get their IDs and equipment
- Complete orientation activities

Set up your onboarding journeys

New hires typically complete some tasks on their first day and others during their first month. Creating separate journeys for each stage helps reduce information overload and track progress effectively.

Create the first-day journey

1. Ensure that you're familiar with *journey actors*.
2. Go to **My Client Groups > Journeys Setup > Journey Templates**.
3. Create an onboarding journey template and complete the relevant fields.
4. Save the template as a draft and add tasks.

   Review these task settings:
   - **Sequence**: Order that tasks appear in the journey, not the order that tasks need to be completed. To enforce a completion sequence, use the Preceding Task field on the Advanced tab.
   - **Mandatory or Optional**: Based on this selection, the completion criteria of the journey are determined. The Completion Criteria field on the Overview tab determines whether journey completion is based on:
     - Completion of only mandatory tasks
     - Completion of mandatory and optional tasks
     - Completion of mandatory tasks; optional tasks expire after a grace period
   - **Dynamic Notes Source**: Source used to generate dynamic task notes, such as a BI Report or Agent. For example, dynamic notes can display employee-specific information, such as an employee's name or equity amount. Dynamic notes appear together with any configured static notes.
   - **Performer**: Person responsible for completing the task. Different journey tasks can have different performers. For example, for tasks such as scheduling orientation sessions, you can use the Area of Responsibility performer type to identify the HR specialist supporting the new hire.
   - **Owner**: Primary contact for the task. The owner gets task notifications and acts as the fallback performer if the assigned performer isn't available. In onboarding journeys, the owner is often the worker's line manager.

   - **Task Type**: How and where the task is performed. For more information, see *What are the task types in journeys?*
   - **When does the task expire?**: Expiration alerts aren't enabled by default. To enable them, go to the Notification and Reminders tab and select the When task is completed notification override for both the owner and performer.
   - **Comments and attachments**: When you enable attachments, files uploaded by new hires, such as educational certificates and degrees, are automatically stored as document records.

5. Activate the journey.

   After you activate the first-day journey, create a first-month journey by following the same process.

Test the onboarding journey setup

After you create the onboarding journeys, test them by automatically or manually assigning them to a test hire from the Journeys page.

For example, you can automatically assign a journey after the hiring action is complete, or manually assign it. For information about automatic journey assignment, see *How are journeys assigned?* This task focuses on manual assignment.

1. Assign the journeys to a test hire.
   a. Go to **My Client Groups > Journeys**.
   b. On the **Explore** tab, search for and select the first-day journey.
   c. Complete the relevant fields.
   d. Select **Assign**.
   e. Repeat these steps for the first-month journey.
2. Validate the journeys as the test hire.
   a. Sign in as the test hire.
   b. Go to **Me > Journeys**. The My Journeys tab displays open journeys by default.
   c. Open the first-day journey. The journey tasks are displayed in the sequence set during the setup.
   d. Review and complete each task. Select **Done** after completing a task.
   e. Repeat the process for the first-month journey.

      The first-month journey becomes available 30 days after the first-day journey.
3. Validate performer tasks.
   a. Sign in as the task performer.
   b. Go to **My Client Groups > Journeys**. The Organization Journeys tab displays assigned journeys by default.
   c. Search for and select the test hire's assigned journey.
   d. Review and complete any performer tasks. Select **Done** after completing a task.

      Task performers can also review the test hire's tasks to verify progress and complete dependent tasks when required.