New Employee Onboarding

Template Set Getting Started Guide

The New Employee Onboarding template set provides a structure to track and manage onboarding, so new employees get up and running quickly.

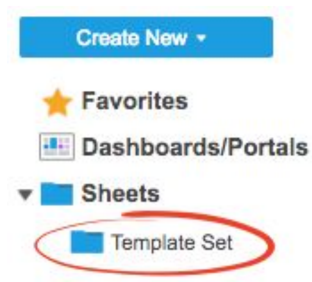
smartsheet.com
Last Updated: August 31, 2019

REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[**New Employee Onboarding Template Set**](#)

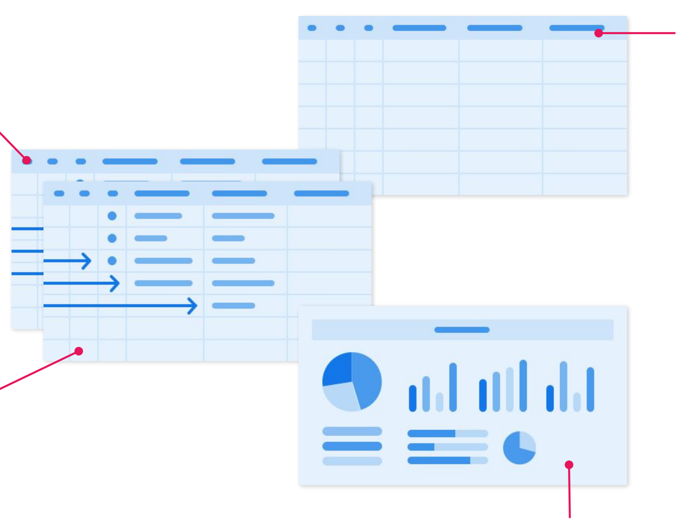


What's Included in the Set

With the New Employee Onboarding template set, you can accelerate employee onboarding and streamline the new hire process.

30-Day Onboarding — Today Tasks Report
This report shows a real-time view of tasks that are due today.

30-Day Employee Onboarding Sheet
Tracks all of the tasks involved in onboarding new employees.s



30-Day Onboarding — Late Items Report
A real-time log of tasks that are past due.

30-Day Employee Onboarding Dashboard
A dashboard that summarizes key information about the new employee onboarding process.

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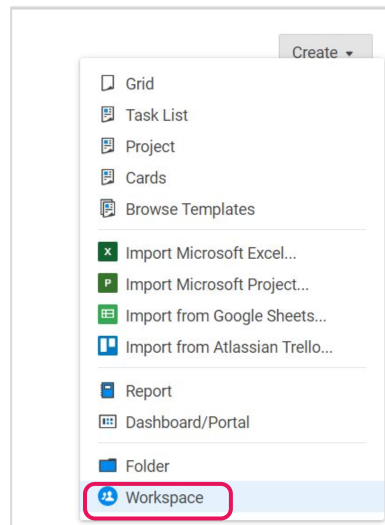
Set Up

Using a [workspace] is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.



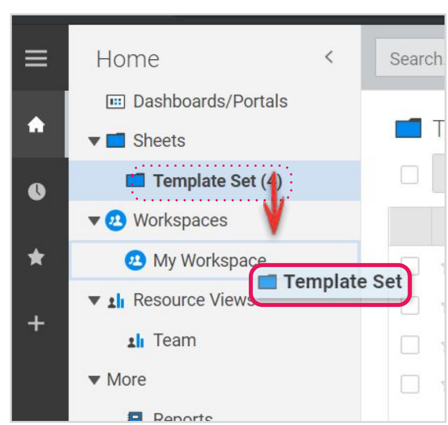
Learn more:

Workspaces Overview, Workspace Sharing, Home Tab

Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.



Learn more:

Manage Items in a Workspace (Add, Move, Remove)

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Customize

Step 3:

Modify the 30-Day Employee Onboarding Sheet

Use the 30-Day Employee Onboarding sheet to collaborate, track, and manage the new employee onboarding process. The sheet will help automate your employee onboarding process timeline from the start date forward.

A. Enter the *employee's name* in row one of the *Task* column.

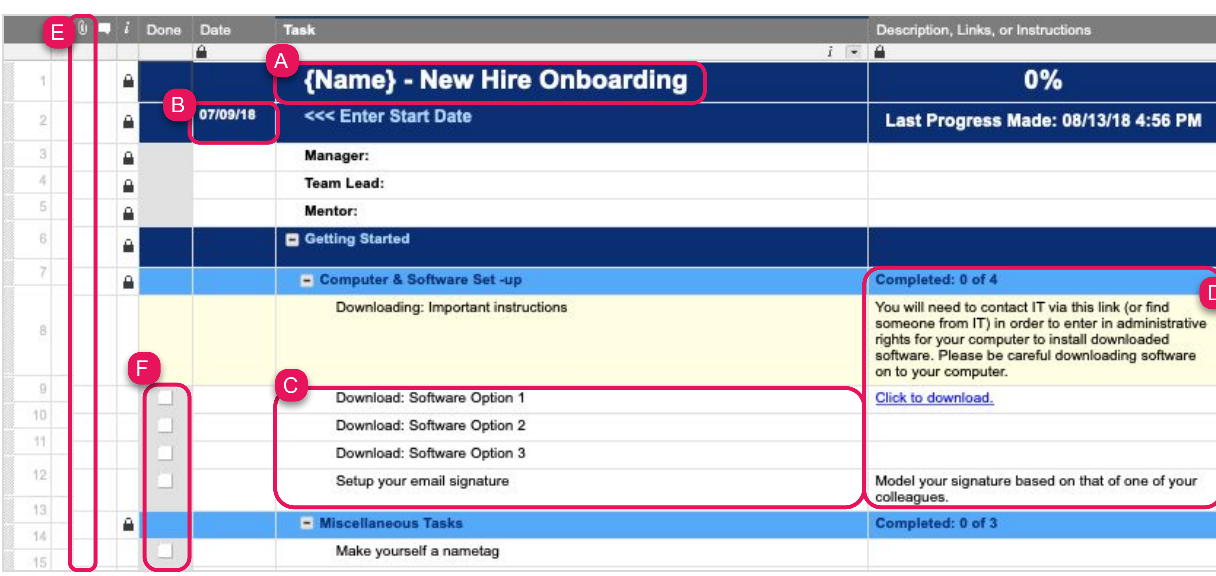
B. Enter the *employee's start date* in row two of the *Date* column. Formulas in the date column will auto-fill dates for the next four weeks.

C. Enter your *task names* in the *Task* column. Hierarchy is used to delineate different resources and tasks for each week. Indent subtasks under tasks by using the *Indent* button on the toolbar, or *Ctrl +]* on the keyboard.

D. Double-click on the *child* rows in the *Description, Links, or Instructions* column and insert text or relevant hyperlinks. There are formulas already embedded in the *parent* (gray) rows. Columns and rows with formulas are locked so that editors cannot change the formulas.

E. Upload attachments for easy sharing of important and relevant documents and files.

F. Track overall progress by using the checkboxes in the Done column.



Learn more:

[Hierarchy: Indent or Outdent Rows], [Parent Rollup Functionality],[Date Columns], [Lock or Unlock Columns and Rows], [Formulas and Functions], [Upload an Attachment]

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Step 4:

Use the Description Column Formulas

There are several different formulas in the parent rows of the Description column whose outputs roll up to the dashboard included in the set. The rows with formulas are locked and can't be changed.

Row one of the Description column has a formula tracking the % complete of all of the onboarding tasks. The specific formula included is:

=COUNTIF(Done:Done, 1) / (COUNTIFS(Done:Done, 0, Task:Task, NOT(ISBLANK(@cell))) + (COUNTIF(Done:Done, 1)))

Row two of the Description column references the Modified system column to track the last date and time that the sheet was updated.

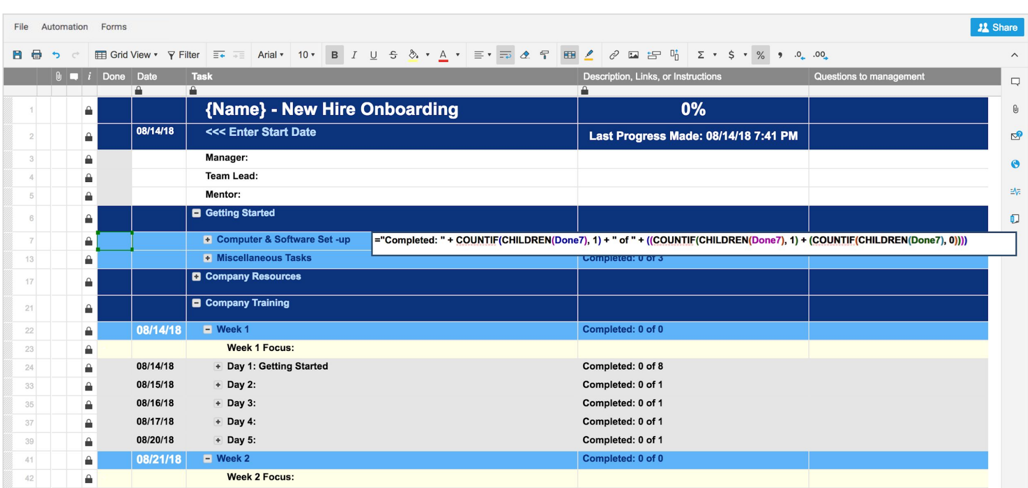
="Last Progress Made: " + MAX(Modified:Modified)

The light blue parent rows calculate the total number of completed tasks per week.

="Completed: " + COUNTIF(CHILDREN(Done22), 1) + " of " + ((COUNTIF(CHILDREN(Done22), 1) + (COUNTIF(CHILDREN(Done22), 0))))

The gray parent rows calculate the total number of completed tasks per day.

="Completed: " + COUNTIF(CHILDREN(Done24), 1) + " of " + ((COUNTIF(CHILDREN(Done24), 1) + (COUNTIF(CHILDREN(Done24), 0))))



Learn more:

[Formulas and Functions]

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Step 5:

Sheet Bonus: View or Edit Your Project Summary Data

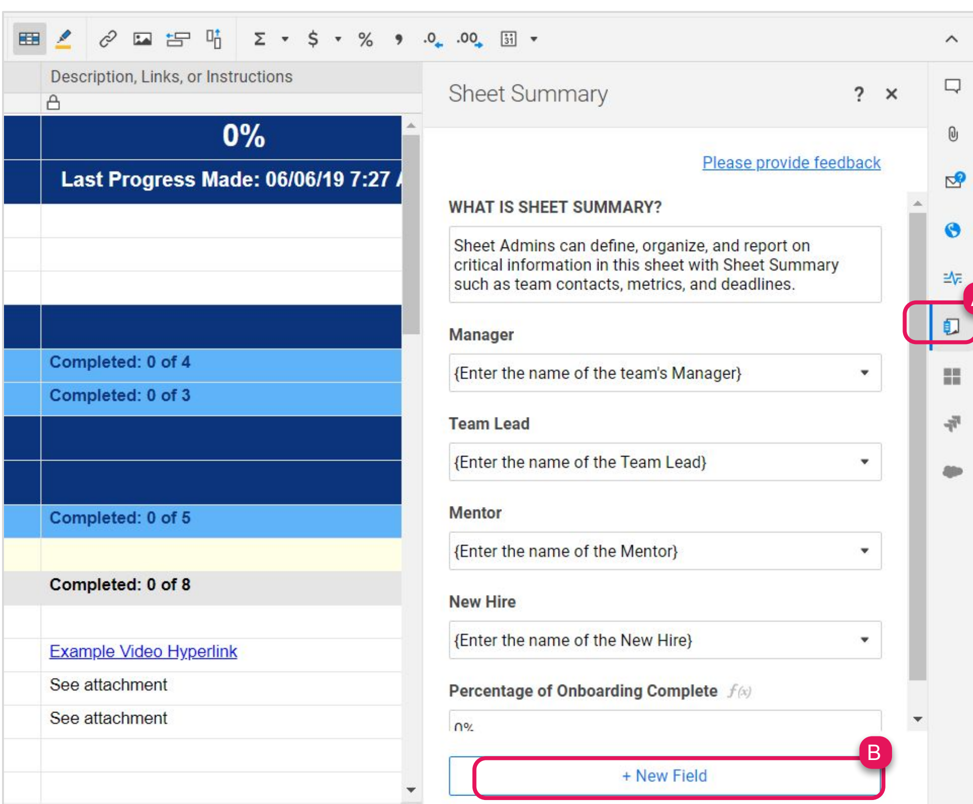
For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The 30 Day Employee Onboarding sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of team contact information and percentage of the onboarding that has been completed. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

A. Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.

B. To add fields, click +New Field.

C. Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.

D. To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.



Learn more:

Define Your Work with Sheet Summary, Maximize Your Sheet Summary Usage, Create a Portfolio View with a Summary Report

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Step 6:

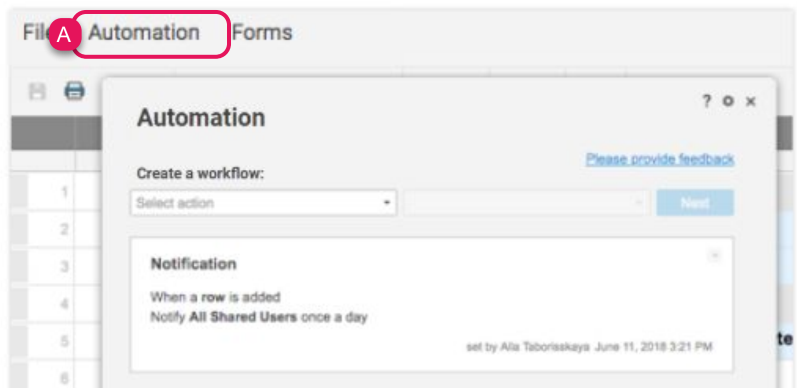
Set Manager Alerts

An automated alert workflow is an efficient way to keep track of the changes in your sheet. We've setup an alert on this sheet to notify the manager once a day when employee questions are logged in the Questions to Management column.

A. To edit the alert workflow, click on *Automation* and select *Manage Workflows* in the dropdown menu.

B. Then double-click on the workflow and change the value in the *Send an alert To* field from *All Shared Users* to *Shared user or email*.

C. Enter the email address of the manager you would like to receive the notification. An alert will be generated and automatically sent once a day whenever the employee enters information in the *Questions to Management* column.



Learn more:

[Save Time and Work Faster With Automated Workflows]

Step 7:

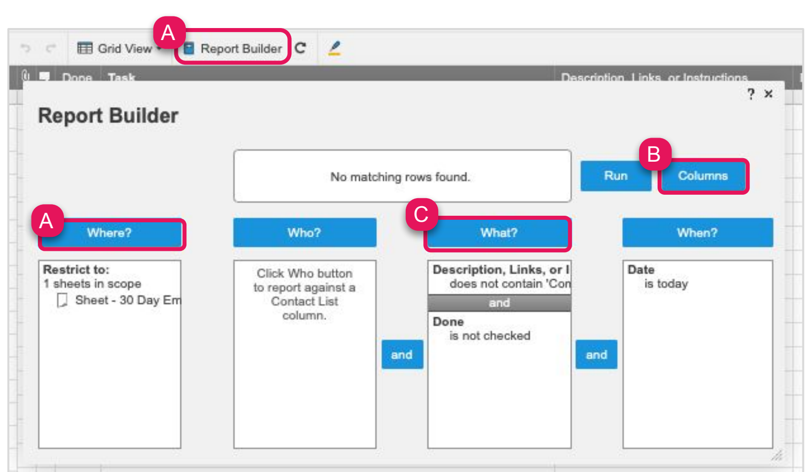
Use Today's Tasks Report

The Today's Tasks Report provides a real-time display of tasks due today.

A. Open the report, click on the *Report Builder,* and ensure the *Employee Onboarding sheet* is selected in the *Where?* field.

B. Using the *Columns* button, select all of the columns you would like to display in the report, including the *Date* column.

C. In the *What* field, the report filters the *Description* that does *not contain Completed* and *Done is not checked.*



Learn more:

[Report Builder]

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Step 8:

Use Late Items Report

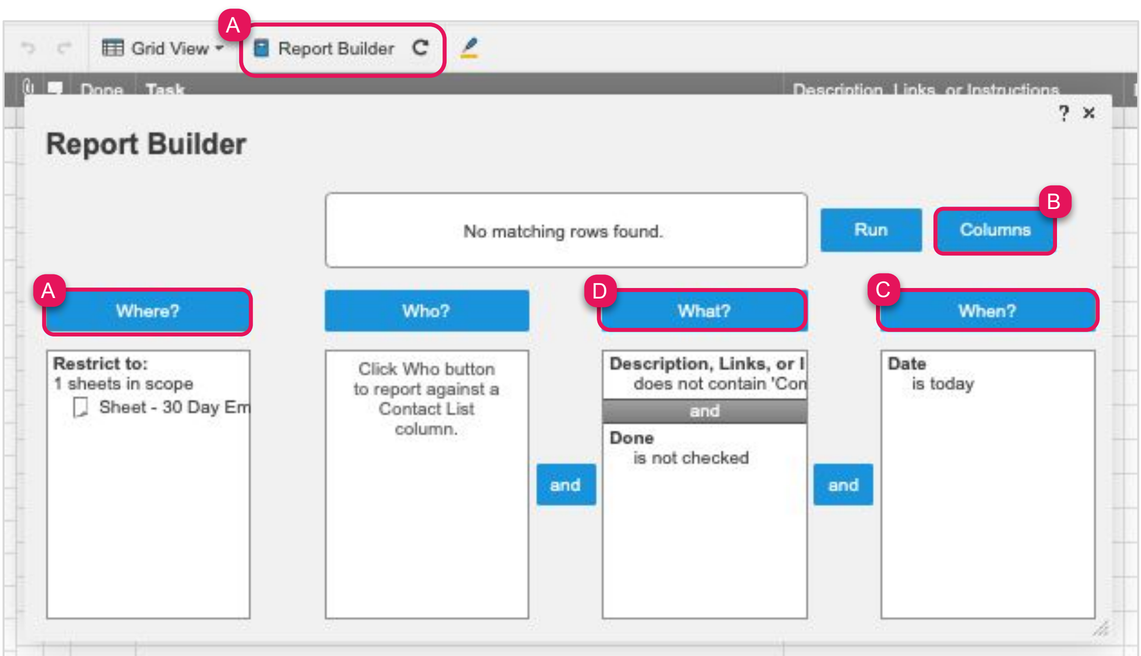
The Late Items Report provides a real-time display of past due tasks.

A. Open the report, click on the *Report Builder,* and ensure the *Employee Onboarding sheet* is selected in the *Where?* field.

B. Using the *Columns* button, select all of the columns you would like to display in the report, including the *Date* column.

C. In the *When?* field, the report filters if the *date is in the past*.

D. In the *What?* field, the report filters by the *Description* column *does not contain "Completed', Done is not checked,* and *Task does not contain* <<<.



Learn more:

[Report Builder]

Step 9:

Setup the Employee Onboarding Dashboard

The Employee Onboarding Dashboard provides easy access to essential resources and summarizes key information such as important dates, onboarding progress, and tasks that are due. Dashboards consist of different widgets that pull in live information from other sheets and reports.

A. Click *Edit* in the upper left corner to begin customizing. Then hover over any widget and select the *pencil icon*.

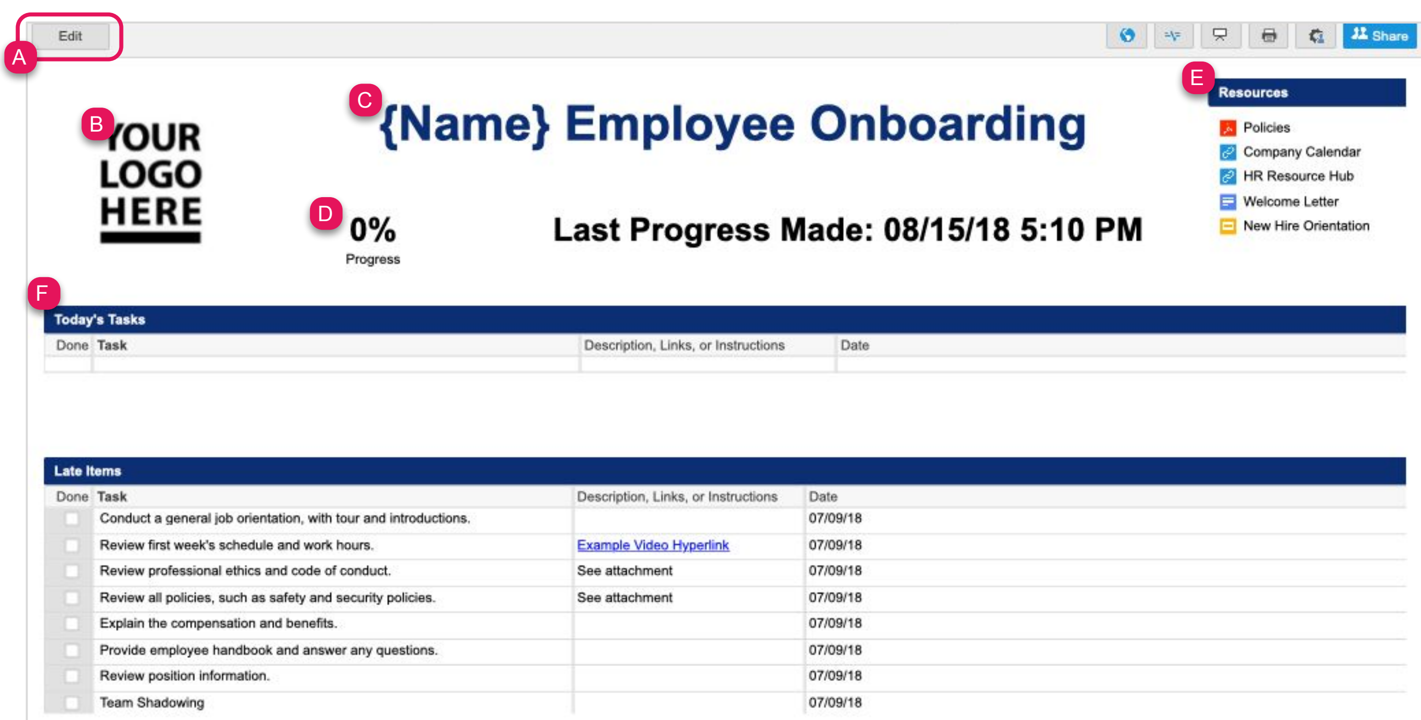
B. Replace the logo placeholder with your own logo in the *Image* widget.

C. Add the employee name to the *Title* widget.

D. The % Progress and Last Progress Made are *Metric* widgets that pull in live data from the Employee Onboarding sheet.

E. Resources is a *Shortcut* widget with links to documents, resources, and other Smartsheet items.

F. Today's Tasks and Late Items are both *Report* widgets, which display the reports included in this template set in your dashboard.



Learn more:

[Make Changes to an Existing Dashboard](), [Viewing and Sharing a Dashboard](), [Widget Types for Smartsheet Dashboards]()

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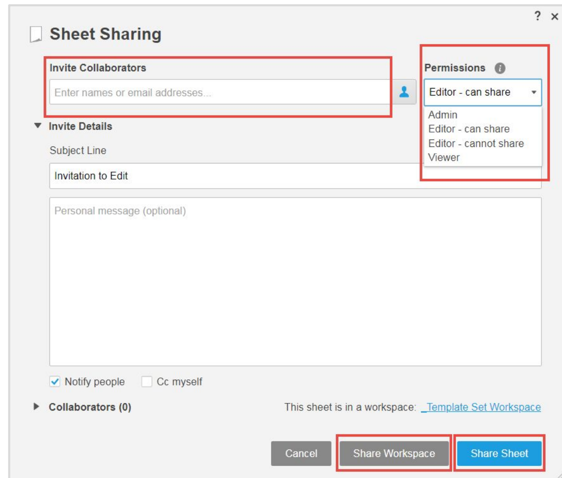
Step 10:

Share Your New Employee Onboarding Template Set

Sharing is the best way to collaborate with others involved in your grant application process. You can share your entire workspace with members of your department, or you simply share individual items within the workspace. For more information on sharing and permission levels, check out this infographic.



Learn more:

Workspace Sharing

FEEDBACK: Let us know what you think of the New Employee Onboarding Template Set! Share your feedback here.