Chapter 4

Appendix A: Steps to Create a New Hire Template

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At least one active, configured new hire template is required. You can use the delivered Standard Hire or Quick Hire templates or create your own as follows.

1. Go to **SETUP > Workflow > Activity Configurations > Custom Activities**.
2. Click **Add**.
   Result: Custom Activity Builder launched.
3. Next to **Activity Type**, select New Hire.
4. Select the roles responsible for entering data. For example, Practitioner Only.
5. Next to **Activity Name**, enter the name you want your activity to have such as "Applicant Onboard".
6. Click **Done**.
   Result: Activity Configuration is launched for the template.
7. For **Practitioner, Manager** and **Employee**, select the steps applicable. Then click **Next** .
8. Order the steps as follows. You can order the steps in the sequence you want the activity steps to be completed.
   1. Next to the step, click the radio button.
   2. Hover your cursor over the handle and drag and drop the step where needed.
   3. Click **Next**.
9. Select participants.
   For each step with the **Assign Profiles** action available, select the profiles responsible for entering information, by moving the selected profiles from the **Available** to the **Selected** column. Then click **Done**.
10. Configure **Content**.
    Click the step to configure page content. The configuration is specific to this activity.
11. Click **Next**.
12. Define the Approval & Notification path.
    Select the default approval path for this activity and/or, if needed, define the exception approval paths.
13. Click **Next**.
14. Click the **Save as Active** check box if you'd like this template to be immediately available. Then click **Done**.
15. If you did not save the template as active, you can activate it later by navigating to the **Custom Activities** tab and finding your new **Activity Name**. In the **Action** column, click **Activate**.