

Chapter 4

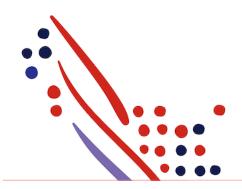
Appendix A: Steps to Create a New Hire Template

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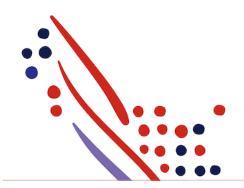
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At least one active, configured new hire template is required. You can use the delivered Standard Hire or Quick Hire templates or create your own as follows.

- 1. Go to SETUP > Workflow > Activity Configurations > Custom Activities.
- 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**.