30-DAY GUIDE

Onboarding Timeline
Introduction

We have broken down the 30-day onboarding process into 4 weeks. Each week’s milestones build on the previous week’s achievements and ultimately will enable you to have the basics in place to launch (publish your schedule, activate all employees, and go “live” with your Humanity account).

Below we will outline each week’s milestones and why they are important. We have also included information on a few tasks on how long these items typically take to complete. We will get into how to complete these tasks later, this timeline is an overview so you know what to expect in the coming weeks.

Decide on a target launch date

What do we mean by ‘Launch’?

By ‘launch,’ we mean the date that you would like to begin full implementation of Humanity with your staff. It’s okay to have more than one launch date (for example, a “soft” launch with team leaders, then another “hard” launch with all employees once team leaders have been trained, created their schedules, etc.).

Don’t skip determining the Launch Date!

Deciding on a launch date is critical to the onboarding process to keep you on schedule. Start with your launch date and work backward from there to create your company’s onboarding schedule.

It is important to be realistic. Think about significant events for your business, for example: when your pay periods end (it is easier to launch at the beginning of a new pay period) or other special events.

Give your leaders time!

Make sure your managers/supervisors/schedulers have enough time to get comfortable with the platform. Their employees will likely go to them with any questions.

Begin familiarizing yourself with the Humanity platform

Play around the platform and start to learn about the different features and functions.

If you are unsure what a particular feature does, reference the Support & Tutorials Section (click on your profile image on the lower left of the screen and click on ‘Support & Tutorials’, or click here).

Take a look at your account’s Administrative Settings.

The settings page can be accessed by clicking on the gear icon on the navigation bar. Only users with the ‘Manager’ permission-level are able to see/edit settings. If you hover your mouse over any setting, a textbox with an additional description of the setting will appear.

Be sure to save any changes you make by clicking the blue ‘Save Settings’ button on the top of the screen.

Set a training completion date for your managers, supervisors, and staff

Training should be completed for Managers/Supervisor users by week 2-3. It typically takes several hours of exploring, following tutorials, and hands-on experience for a Manager/Supervisor user to be truly comfortable using the platform.

Employees can be extended to week 3, or even post-launch if desired.
Week 1 - Getting Started

This period is all about preparing for the coming weeks. You will be determining what needs to be done to prepare your account (settings, features to be used, etc.), prepare your team leaders, and prepare your staff.

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**Pro-Tip:** Employees typically need less training time than manager/supervisor/scheduler users. An hour is usually plenty, as they utilize substantially less functionality day to day.
Create locations & positions.

To add shifts, assign staff, pretty much do anything within Humanity, you will need to have locations and positions created.

Depending on your company's size and structure, creating locations and positions can take anywhere from a few minutes to a few hours.

Import or manually enter your Staff List.

Importing your staff list will take much less time than manually entering each employee into Humanity. (Please use our template, available for download on our Resources page, to ensure your staff are imported and your data populated properly.)

If you choose to manually add your employees: The minimum which must be input into the system is a first and last name. Any additional staff information will also need to be entered manually as well. Depending on the number of employees you have, this process can take anywhere from a few minutes to many hours, which is why we highly recommend importing!

Regardless of how you add staff to your Humanity account, all staff will need to be assigned positions based on location. You will not be able to assign an employee to a shift without this step completed.

Pro-Tip: If your staff is list well prepared, importing only takes a few minutes!
Permission levels will also need to be set for each employee. The default is the ‘Employee’ level permission, which has limited functionality. Any team leaders, schedulers, etc. will need to have their permission level upgraded.

Create your first schedule!

- Keep your target launch date in mind when doing this!

- You will be creating your schedule but not publishing (that comes later!)

- This process can take a few minutes to several hours, depending on complexity.

🌟 Pro-Tip: It is possible to import a schedule as a .csv or .xls file, download the template from our Resources page. Be sure to use our template.

Train your staff

If you plan to have Managers/Supervisors train their own employees, be sure to give your team leaders ample time to become familiar with their responsibilities within the platform and with how the Humanity works. Typically 1 - 2 focused training sessions are needed, plus time to explore Humanity hands-on.

🌟 Pro-Tip: Humanity features a Training Module where you can create & assign training topics to your staff, track their progress, etc. Click here to learn more about the Training Module.
Later in this guide, we list several tutorials that you can use to train yourself and your staff. All your employees also have access to the **Support & Tutorials Section**, which has hundreds of tutorials and training topics.

### Begin preparing your staff for activation

Check out the Staff Activation Cheat Sheet for a step-by-step guide on how to prepare your staff for launch. To download the Staff Activation Cheat Sheet, visit our [Resource page](#).

⭐ **Pro-Tip:** The Staff Activation Cheat Sheet includes a template email you can send to your employees, explaining what to expect once activation occurs. We highly recommend using this!
Week 4 - Launch

By this time your managers/supervisors should be trained, you should have your first schedule completed, and your staff list entered and ready to be activated. This week will be about tying up loose ends and ultimately going “live” with your account!

Decide on a target launch date

Use the Launch Checklist to make sure you have completed everything needed to launch the Humanity platform with your staff. To download the checklist, visit our Resource page.

Prepare for questions your staff might have post-launch.

Launch! Publish your schedule, activate all staff, begin actively using the platform!

Pro-Tip: Don’t stop here! Start thinking about your next schedule, learn how to approve timesheets, prepare for payroll, etc.
Conclusion

We realize that a 30-day onboarding program will not work for all of our customers. This timeline is meant to be a starting point, which you can tailor to your specific needs. Always start from your target launch date and work backward from there to make sure everything gets completed.

If you need assistance in adjusting the Self-Onboarding Program timeline to your unique situation, feel free to contact us.