Creating and Editing Onboarding Templates

FOLLOW THESE STEPS TO SET UP NEW TEMPLATES OR UPDATE EXISTING ONES FOR YOUR ONBOARDING WORKFLOW

Topics

This instructional presentation covers the two topics below. To skip ahead, click the button.

How to create a new template

How to update an existing template

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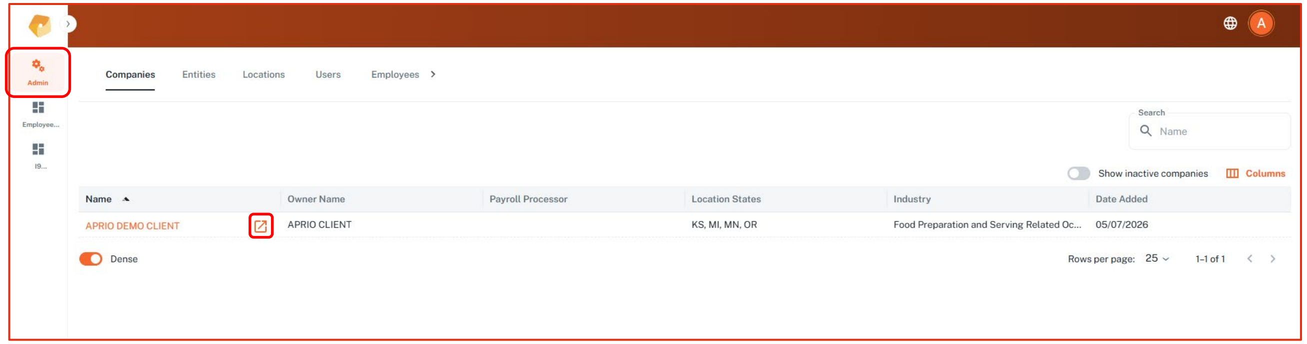
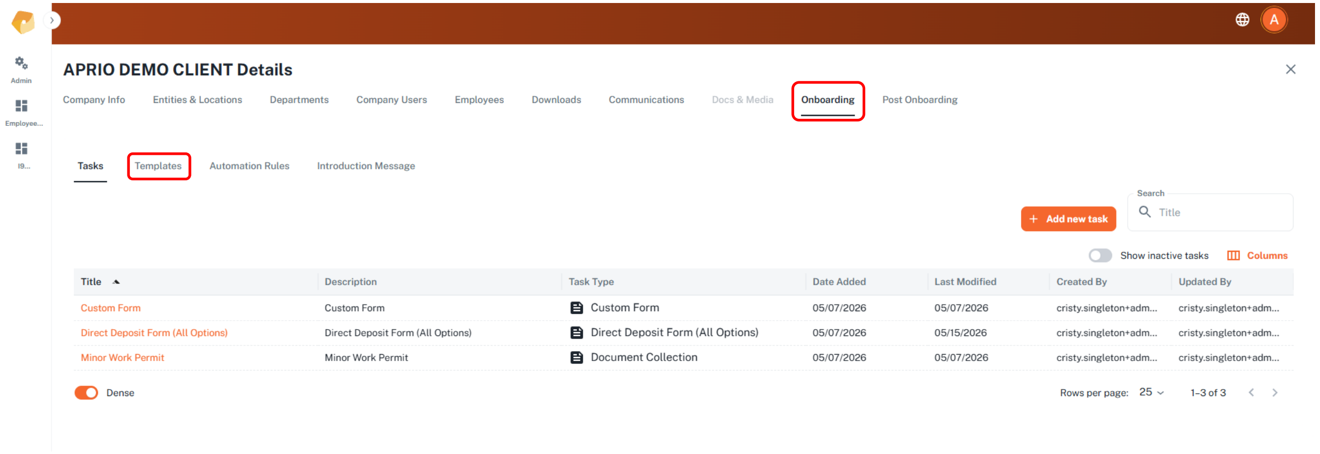
How to create a new template

How to create a new template

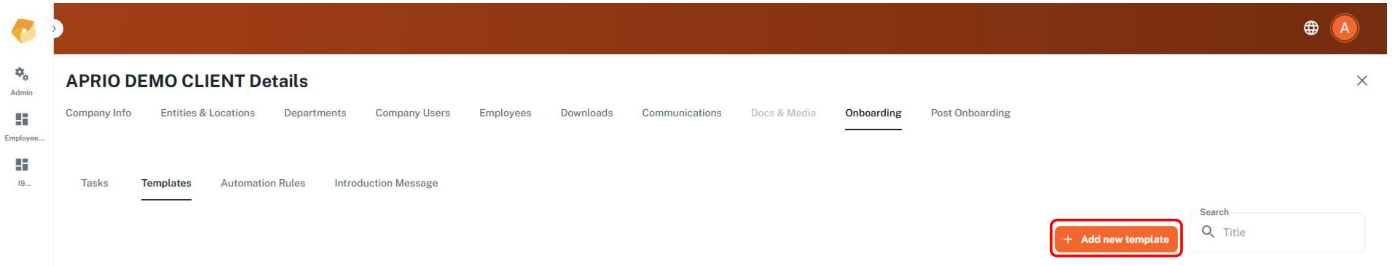
In the **Admin** section, open the Company Details by selecting the open icon next to your company name.



Select the **Onboarding** tab, and then select the **Templates** sub-tab.



Select the **+Add New Template** option.

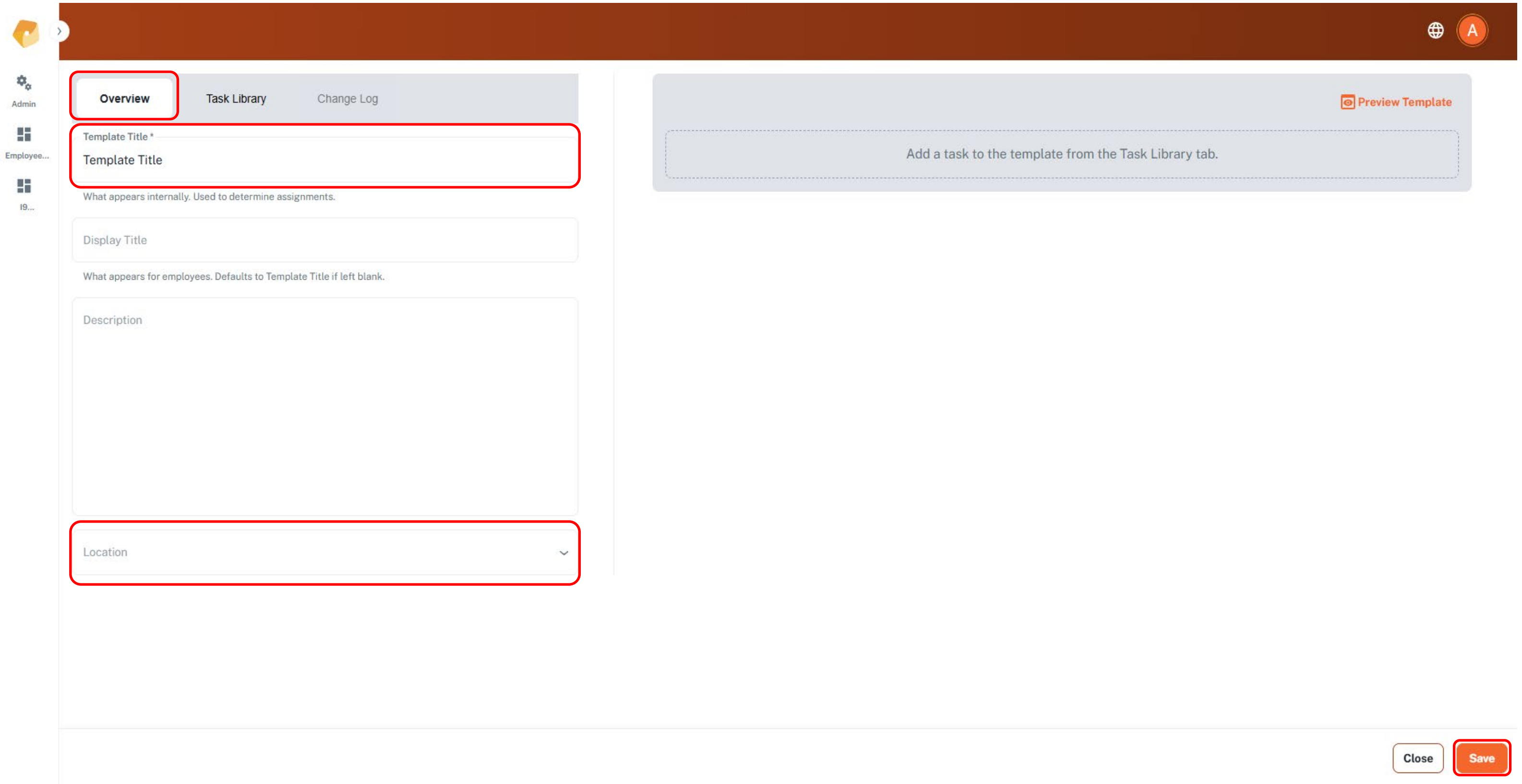


How to create a new template

On the Overview tab, enter a Template Title. The Display Title and Description fields are optional.

Use the Location dropdown to choose whether the template will be available at all locations or only specific ones. This step is required before assigning the template to employees.

Click Save when finished to create your new template.

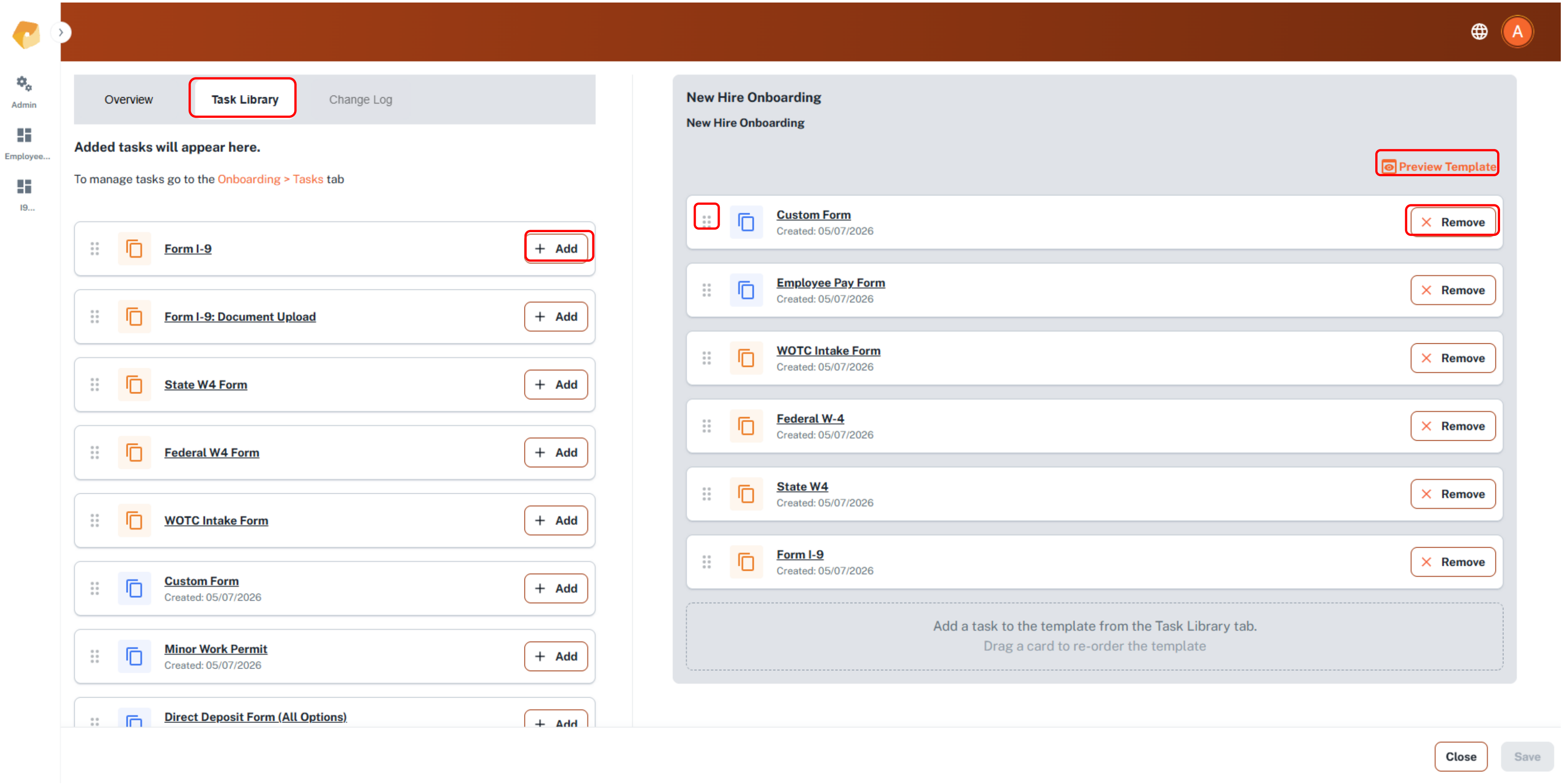


How to create a new template

Navigate to the Task Library tab and select + Add next to any task to include it in the template.

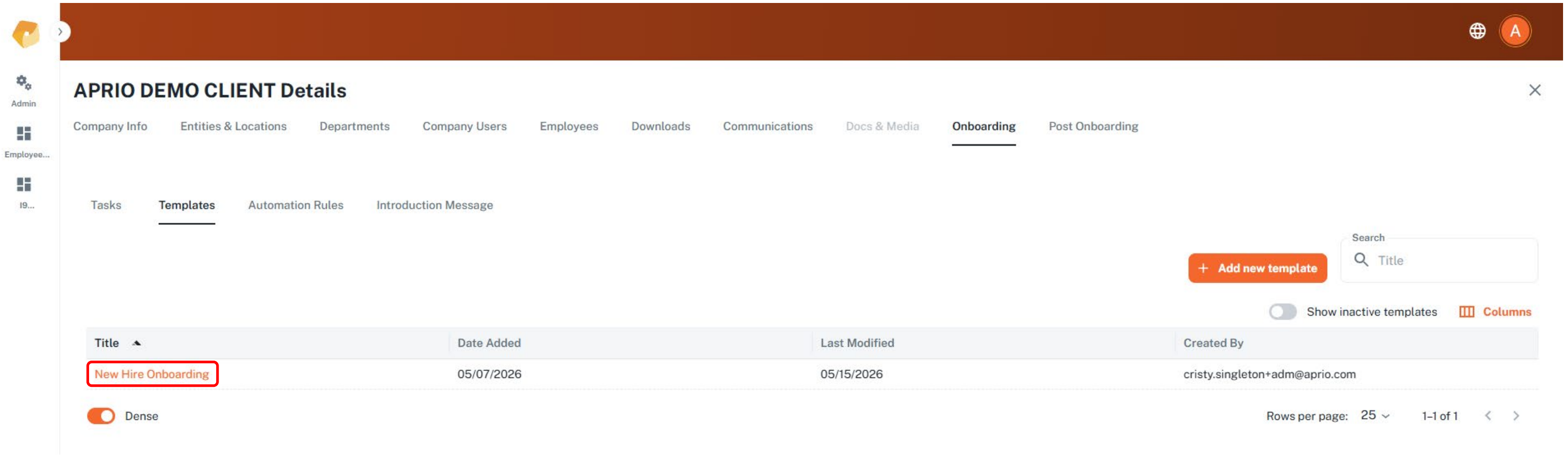
Use the drag handle icon to reorder tasks as needed — task order is flexible for new hires. To remove a task, select x Remove next to it.

Select the Preview Template to review the onboarding process before finalizing. When ready, click Save to complete your template setup.

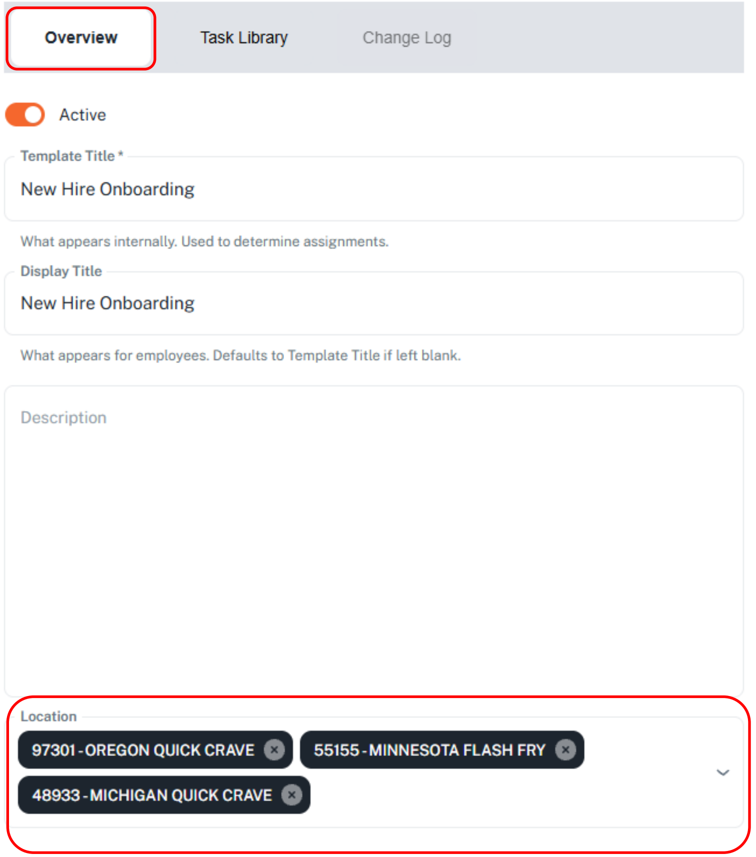


How to create a new template

Your new template will appear in the Templates tab after it has been saved.



To confirm that it is available to add to new hires, make sure the template has been assigned to the same location where the new hire was added. This can be completed in the Overview tab.



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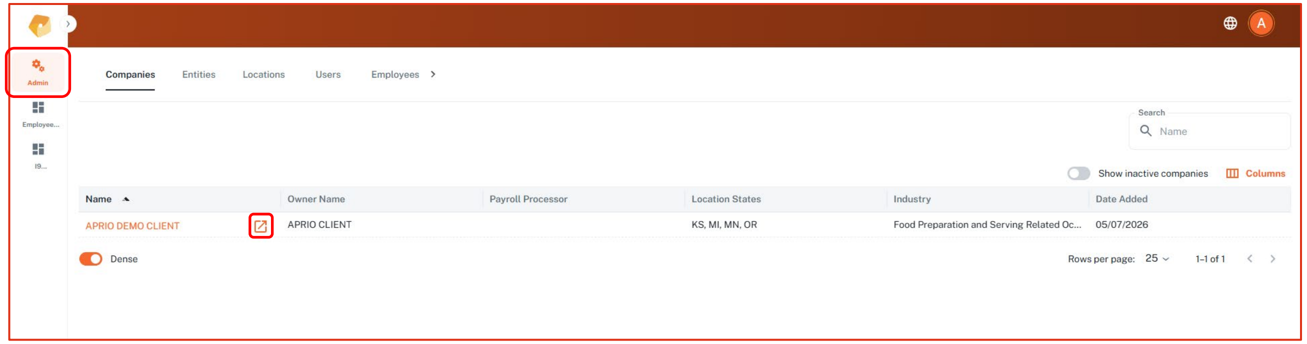
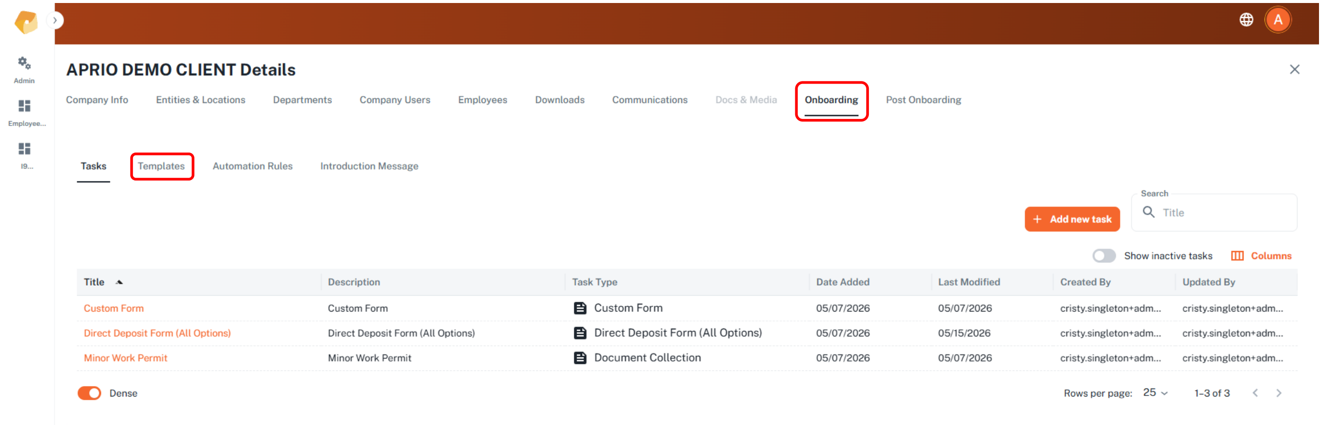
How to edit an existing template

How to edit an existing template

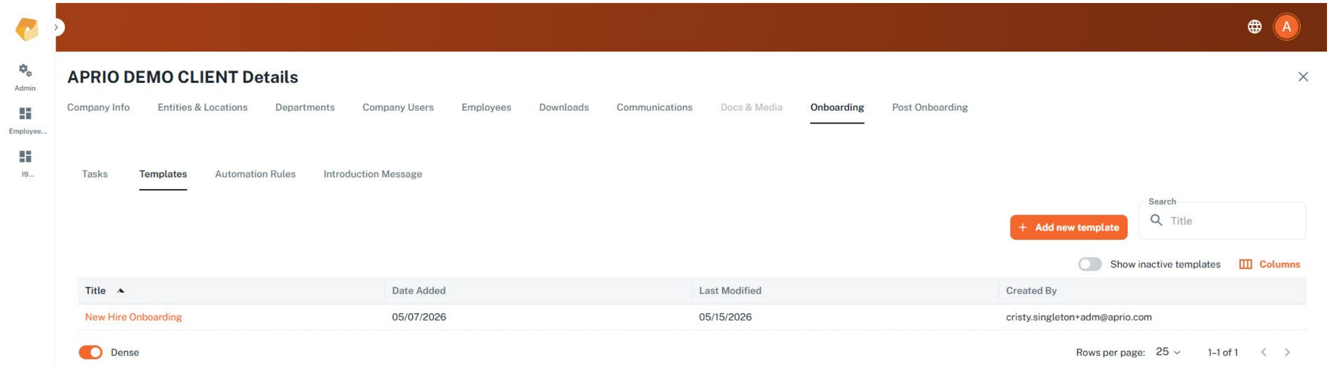
In the Admin section, open the Company Details by selecting the open icon next to your company name.



Select the Onboarding tab, and then select the Templates sub-tab.

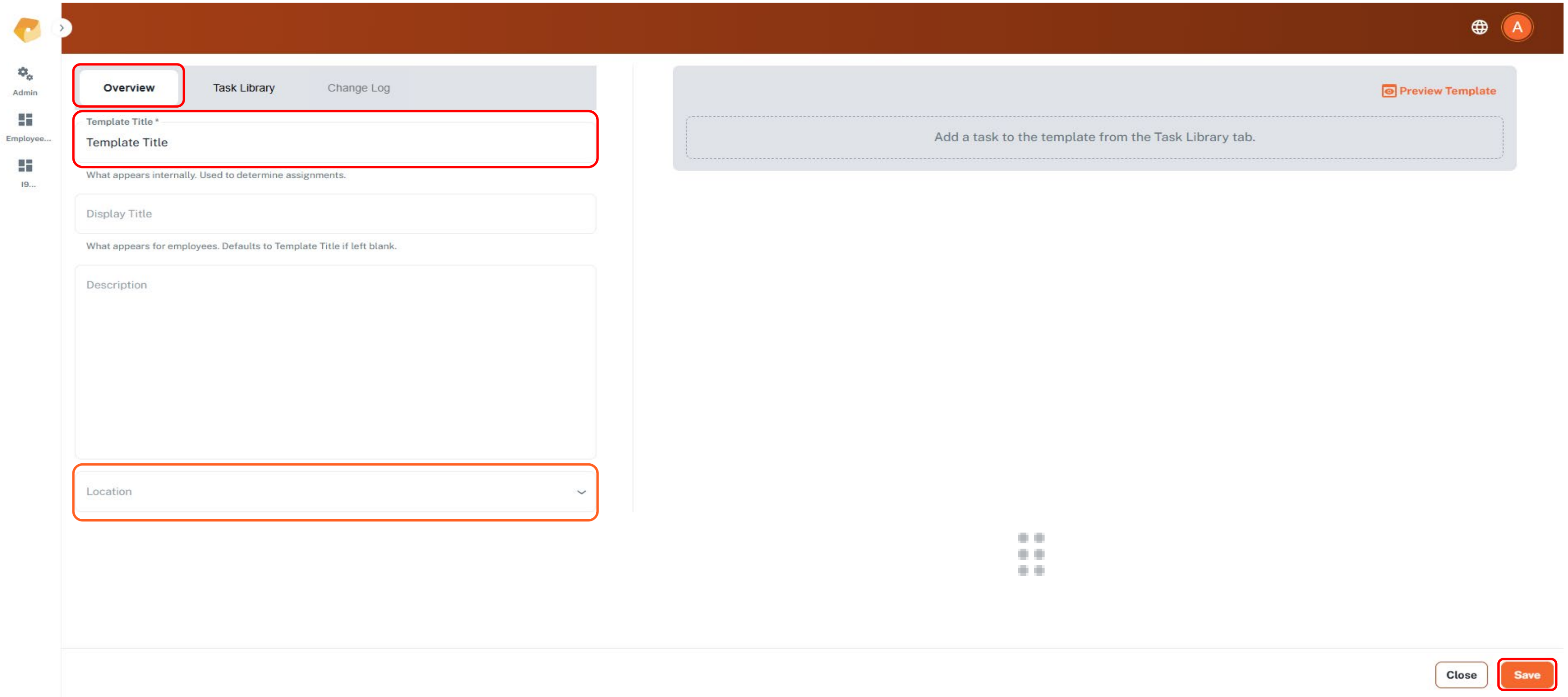


Select the name of the template you would like to ec



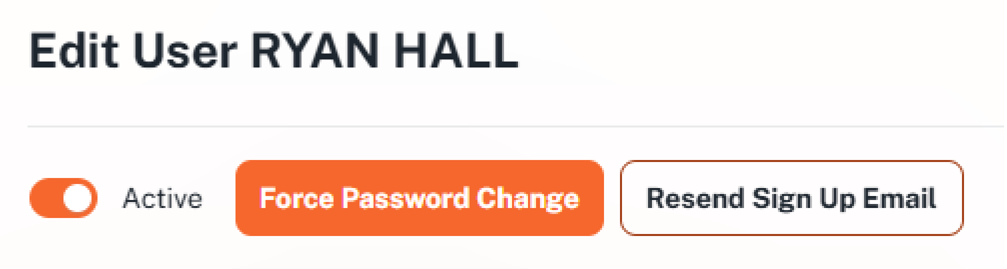
How to edit an existing template

On the Overview tab, update the Template Title, Display Title, or Description as needed, or use the Location dropdown to update where the template is available. Once all updates have been made to this section, click Save to apply your changes.



How to manage users in Aprio Connect

To deactivate the user, turn off the **Active** toggle. To force a password change on the next login, select **Force Password Change**. To resend the user's sign-up email with their credentials, select **Resend Sign Up Email**.



To add more locations or departments, or change roles and permissions, select **Add Role**. To remove the role, location, or department, select the trashcan icon. Click **Save Changes** once finished.

Roles and Permissions

+ Add Role

Role	Entity	Location	Department	Actions
Location Manager	APRIO ENTITY	KANSAS FLASH FRY	TEAM MEMBER	
Location Manager	APRIO ENTITY	MINNESOTA FLASH FRY	TEAM MEMBER	
Location Manager	APRIO ENTITY	MICHIGAN QUICK CRAVE	TEAM MEMBER	
Location Manager	APRIO ENTITY	OREGON QUICK CRAVE	TEAM MEMBER	