

Working With Records

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Adding and Viewing Records

Adding records to the Appvibe HR Onboarding Tracker is straightforward. Whether you're working at a system level, a project level, or a Jira issue level, the process is designed for simplicity. The Onboarding dashboard facilitates the management of onboarding tasks for new employees efficiently.

To add a record, navigate to the Onboarding dashboard and click the "Create" button. You'll be prompted to enter data for several key fields: Employee Name, Task Type, Due Date, Assigned HR Rep, Completion Status, and Notes. Additionally, you have the flexibility to include tags and any custom fields you have predefined to tailor the onboarding record to your organization's unique needs.

Once you've created a record, it becomes an integral part of the Onboarding dashboard, where you can perform several actions to manage your onboarding data effectively:

1. **Create and Manage Multiple Views**

Select the 'View' dropdown at the top of the dashboard to create new views, manage existing ones, or clear a view. Note that making changes to views requires admin role permissions.

2. **Filter by a Column Value**

Filter data by clicking the column title icon and entering your desired filter criteria. This option is available only for columns where filtering is enabled.

3. **Sort by a Column Value**

Sort records by double-clicking on a column title, which enables forward or reverse sorting, helping you to organize data according to your specifications.

4. **View Activity History**

Access the complete history of user activities that modify data by clicking the three dots at the top right corner of the dashboard and selecting "Activity History."

In summary, the HR Onboarding Tracker streamlines the addition and management of onboarding records. With customizable fields and comprehensive dashboard functionalities, it provides a robust solution for HR teams to oversee employee onboarding efficiently.