Appvibe HR Onboarding Tracker

Overview of Features

Key Features

The Appvibe HR Onboarding Tracker is designed to streamline the employee onboarding process by integrating directly with Jira. By organizing tasks and documents, it ensures that everyone involved in onboarding stays informed and ready for action. This app links specific onboarding tasks to Jira issues, providing a centralized platform for tracking progress, managing workloads, and optimizing team efficiency during the onboarding phase.

Harnessing customer feedback is crucial for refining onboarding tasks. It provides insights that help align processes with employee needs, ensuring a smoother transition for new hires. With valuable feedback, HR teams can adapt and enhance their onboarding strategies, catering specifically to the requirements of new employees. This iterative process leads to more satisfied and productive team members.

- **Feedback Submission**: Capture feedback seamlessly through Jira issues and dedicated forms, ensuring that every comment is recorded and accessible.
- **Organized Views**: Use tags, filters, and saved views to sort and prioritize feedback efficiently, allowing teams to focus on the most pressing issues first.
- **Direct Jira Integration**: Easily link customer feedback to Jira issues, ensuring actionable follow-ups and a cohesive workflow.
- **Customizable Layout**: Add, remove, or rearrange columns to suit your team's feedback tracking needs, providing flexibility and clarity in managing information.
- **Activity History**: Maintain a clear log of actions and updates made to each feedback record, enhancing accountability and transparency.

In conclusion, Appvibe HR Onboarding Tracker empowers HR and project teams by combining feedback management with robust issue tracking via Jira. This integration facilitates a more organized, responsive, and efficient onboarding experience, ultimately benefiting the entire organization.

Getting Started

Installation

HR Onboarding Tracker is a Jira app designed to streamline the onboarding process of new employees. Follow the steps below to install and activate it within your Jira environment.

Step 1:

Log in to Jira with Admin privileges.

Step 2:

Open the Atlassian Marketplace by clicking on Apps → Explore more apps in Jira.

Step 3:

Search for **Appvibe HR Onboarding Tracker** using the search bar.

Step 4:

Install the App by clicking Get app or Try it free. Confirm the installation and grant the required permissions.

Once installed, navigate to Manage Apps in the Admin section to ensure HR Onboarding Tracker is enabled. You can then access it by clicking on the link located under the Apps section in the left menu.

By following these steps, you can swiftly integrate HR Onboarding Tracker into your Jira setup to enhance your employee onboarding process.

Configuration

Setup and Customization

Configure and Set Up Appvibe HR Onboarding Tracker

To configure and set up the Appvibe HR Onboarding Tracker, navigate to **Manage Apps** in your Jira instance. Locate the Appvibe HR Onboarding Tracker app, then click on the **Configuration** button. This action will redirect you to the configuration page, where you can adjust Roles and Permissions, review System Fields, set up Custom Fields, and configure Conditional Formatting.

Roles and Permissions

The Appvibe HR Onboarding Tracker app offers three distinct user roles:

1. **Admin**: This super role provides access to all features, including configuration and setup.
2. **Editor**: Allows users full access to update and view HR Onboarding Tracker data.
3. **Viewer**: Grants users viewing rights but restricts them from updating HR Onboarding Tracker data.

Administrators can assign these roles to any Jira groups from this configuration page. By default, Jira Administrators have access to the HR Onboarding Tracker configuration screens.

System Fields

The app comes with predefined fields essential for tracking onboarding tasks. These fields include:

- Employee Name
- Task Type
- Due Date
- Assigned HR Rep
- Completion Status
- Notes
- Tags

These fields serve as the fundamental components required for operating the HR Onboarding Tracker.

Custom Fields

To define additional fields tailored to your needs, use the Custom Fields setup. Click on the **Add Field** button to create a new field, specifying the following options:

- **Field Key**: A unique identifier for the field.
- **Field Label**: Descriptive label for the field key.
- **Field Type**: Choose the data type (Text, Number, Date, Select, Multi-Select).
- **Required**: Flag to indicate if the field must be filled.
- **Sortable**: Flag to determine if the field is sortable.
- **Filterable**: Flag to enable filtering by this field.

Conditional Formatting

Conditional Formatting allows you to apply special formatting to data when specific conditions are met. Set up conditions based on field values, and if these conditions are satisfied, you can adjust labels and highlight colors accordingly.

Summary

In summary, the Appvibe HR Onboarding Tracker provides comprehensive tools for setting roles, defining essential fields, creating custom fields, and applying conditional formatting. These configurable elements ensure adaptability to your organization's specific HR onboarding processes. For any organization using Jira, this app streamlines onboarding

Working With Records

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.

FAQ

FAQ

What is the object and purpose of this app?

The purpose of the app is for Onboarding Task. It is designed to keep track of onboarding tasks and documents for new employees, linking them to specific Jira tasks.

What types of feedback can the app track?

The app supports tracking Onboarding Employee Name, Task Type, Due Date, Assigned HR Rep, Completion Status, and Notes. You can also add custom fields for other related fields that you wish to track.

How do I install the app?

You can install the app from the Atlassian Marketplace. Navigate to the Apps section in Jira. Search for the app name HR Onboarding Tracker. Click Install and follow the prompts.

How do I get support for the app?

Support is available via our support page at https://appvibe.com/support.

Support

Appvibe Support

Overview: We are here to help you. The Appvibe HR Onboarding Tracker app makes it easy to manage and access onboarding within Jira. The app allows a business to keep track of onboarding tasks and documents for new employees, linking them to specific Jira tasks.

Support Contact: If you need further assistance or want to suggest additional features, you can reach us on our Support Page at https://www.appvibe.com/support