Greenhouse Onboarding Release Notes

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Paired with Greenhouse Recruiting, Greenhouse Onboarding allows you to build a new hire experience that begins the moment you extend an offer, providing a consistent transition from offer letter to integrated team member.

Learn more about Greenhouse Onboarding >

greenhouse

Summer 2019

Summer 2019 Greenhouse Onboarding Product Additions

Bulk Onboarding

Add Task to Calendar

HRIS Integrations

3rd Party Tasks

Manager Permissions

Tokens in Tasks

Assign Dates

Custom Employment Status

Other Criteria

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Bulk Onboarding

By leveraging Bulk Onboarding, HR Teams are now easily able to add a large volume of new hires to the appropriate workflows.

Instead of manually adding new hires one by one, and clicking through the new hire flow thousands of times, HR Teams can:

- Automatically process and convert multiple pending hires to employees at one time

- Kick off Onboarding Plans for multiple hires with a few clicks, automatically assigning the right tasks, documents, fields and Welcome Experience

This feature makes it even easier for ops folks and onboarding specialists to ensure that new hires get a consistent and streamlined onboarding experience, receive the information they need and get ramped up as quickly as possible at scale. By automating the process of putting new hires through the appropriate onboarding in high volume, HR Teams can focus on driving cross-functional relationships, securing stakeholder buy-in on people processes, and building an onboarding culture that engages the new hire.
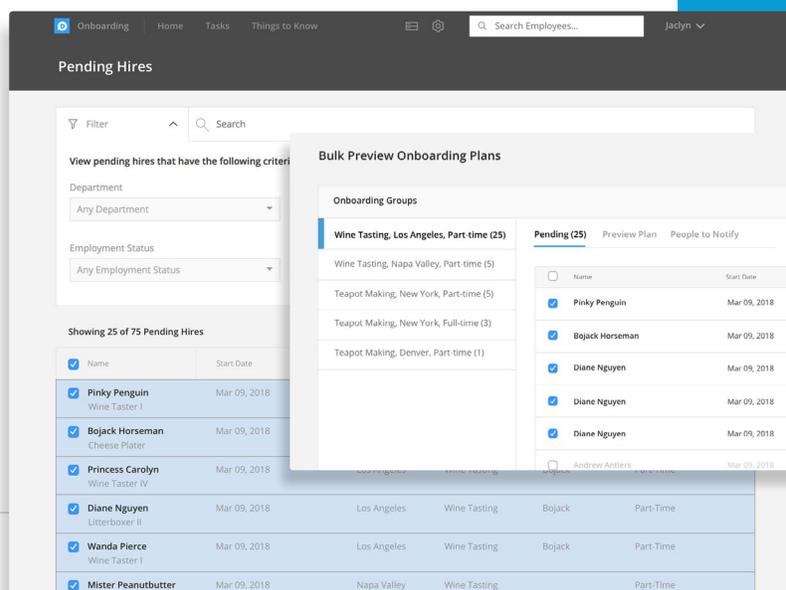
Learn more about Bulk Onboarding ⟩

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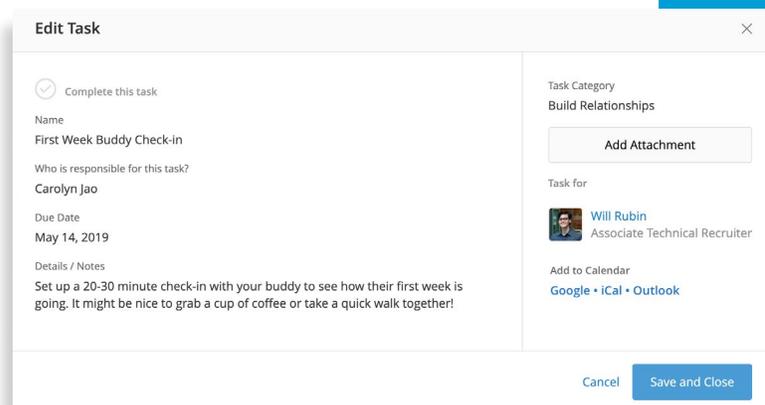
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Add Task to Calendar

With the Add Task to Calendar feature, individuals that are a part of the onboarding process have another way to remind themselves of what they need to do and when they need to do it.

Instead of logging into Greenhouse Onboarding to view the tasks assigned to them, the individual can easily see when tasks are due, along with the task details (e.g. due date, who the task is for, any content within the task) listed in-app, simply by checking their calendar app.

Note that tasks will be added as all day events on the user's calendar.

By creating the ability for the individual assigned a task to add the task to their calendar (Google, iCal, Outlook), we are allowing them to work the way they want to.

Edit Task ✕

◯ Complete this task

Name
First Week Buddy Check-in

Who is responsible for this task?
Carolyn Jao

Due Date
May 14, 2019

Details / Notes
Set up a 20-30 minute check-in with your buddy to see how their first week is going. It might be nice to grab a cup of coffee or take a quick walk together!

Task Category
Build Relationships

Add Attachment

Task for

Will Rubin
Associate Technical Recruiter

Add to Calendar
Google • iCal • Outlook

Cancel   **Save and Close**

Giving the task owner another way to remind themselves of the task that they are responsible for outside of Greenhouse Onboarding helps improve chances that the task will not only be completed, but completed on time. This results in a better experience for both the person assigned the task and for the new hire being onboarded.

Learn more about Add Task to Calendar ⟩
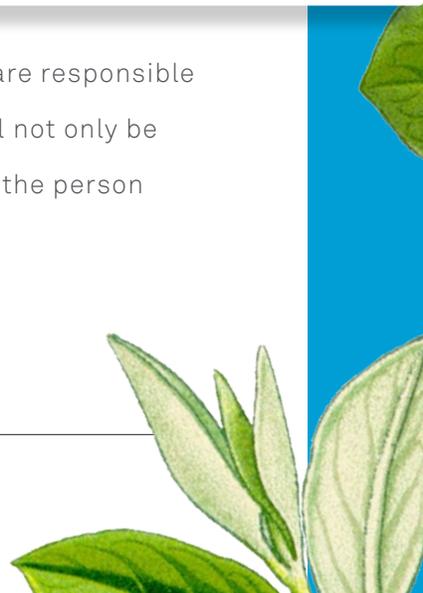
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HRIS Integrations

Greenhouse Onboarding customers using either **Namely** or **BambooHR** as their HRIS to manage benefits, payroll and time off are now able to automate the flow of data from GHO into Namely or Bamboo.

By syncing over information with a click of a button, they save valuable time and remove the need for manual work.

Picture this: you've carefully crafted the perfect onboarding experience for your new hires, from friendly pre-boarding touchpoints to their first crucial days on site. In that process, you've asked the new hire to fill out some key information prior to their first day. Enabled with these HRIS integrations, you're now able to automate the flow of data from Greenhouse Onboarding into your system of record, giving you a head start on completing your new hire's profile, and reducing the amount of manual work required.
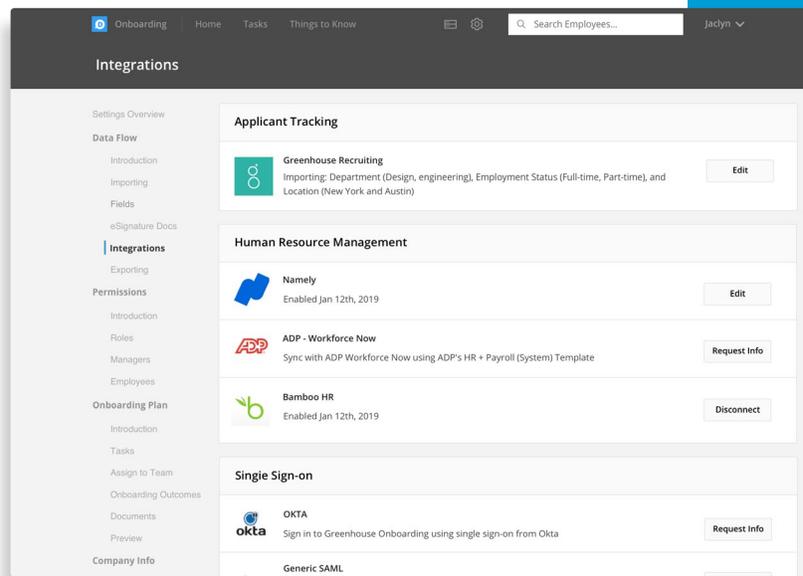
Learn more about the Namely Integration ⊙

*Learn more about the Bamboo Integration* ⊙

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3rd Party Tasks

Using Greenhouse Onboarding's 3rd Party Task System, any onboarding stakeholder teams (e.g. IT, Facility Teams, People Support) that use an external ticketing system are now able to continue to use the systems they already know and love in conjunction with Greenhouse Onboarding.

Teams can now:

- Create tasks in an external third party system by assigning Greenhouse Onboarding tasks to a specific email used by the ticketing system (e.g. itsupport@)

- Use Tokens in Tasks to make relevant information available to the users completing the task, avoiding having to hunt down new hire information across multiple systems (e.g. first name, last name, department, manager, location)

Onboarding stakeholder teams are empowered to continue to use existing workflows in third party task systems like JIRA, Asana, Trello, Zendesk and ServiceNow, while working with GHO tasks. By ensuring GHO tasks work seamlessly with other systems, onboarding stakeholders have visibility on what needs to be done and are more easily able to complete the tasks assigned to them.
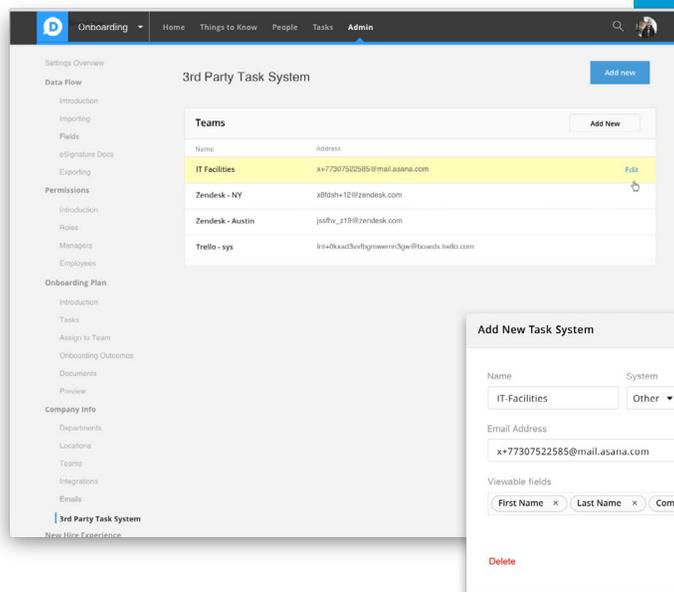
Learn more about 3rd Party Tasks ⟩
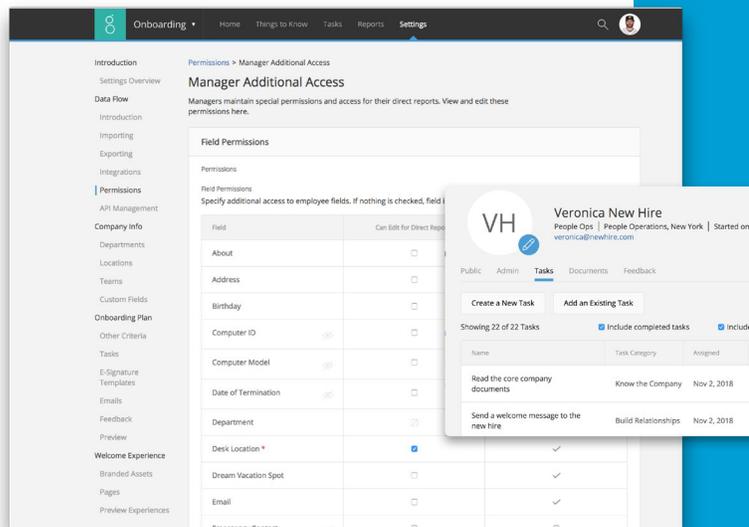
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Manager Permissions

The launch of Greenhouse Onboarding Permissions allows hiring managers to easily create, manage and adjust onboarding workflows for all their new hires.

Instead of having to ask the Greenhouse Onboarding Admin every time changes need to be made to new hires workflows (not scaleable or efficient), hiring managers are now enabled with:

- Ability to view, edit, and complete tasks that have been assigned for their new hires onboarding

- Ability to view E-signature documents

This feature empowers hiring managers to set their new hires up for success from the day the offer letter is signed. By expanding permissions and allowing the hiring manager more ownership and visibility over the tasks assigned to all those involved with onboarding their new hire, they're able to more effectively follow up if tasks are not completed, adjust workflows as necessary and add tasks that are relevant for their department or the role.


Learn more about Manager Permissions ›
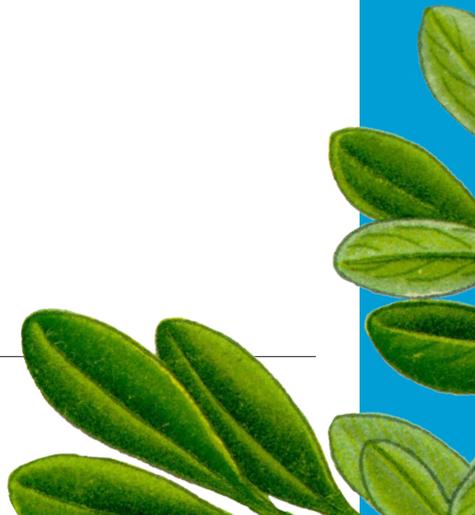
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Tokens in Tasks

Instead of manually looking up a new hire's manager, department, and location in order to complete a task, use tokens to pull custom field values for a new hire into a task so that all the information you need is in one place. For example, use the "Department" token to show the new hire's department in the body of the task.
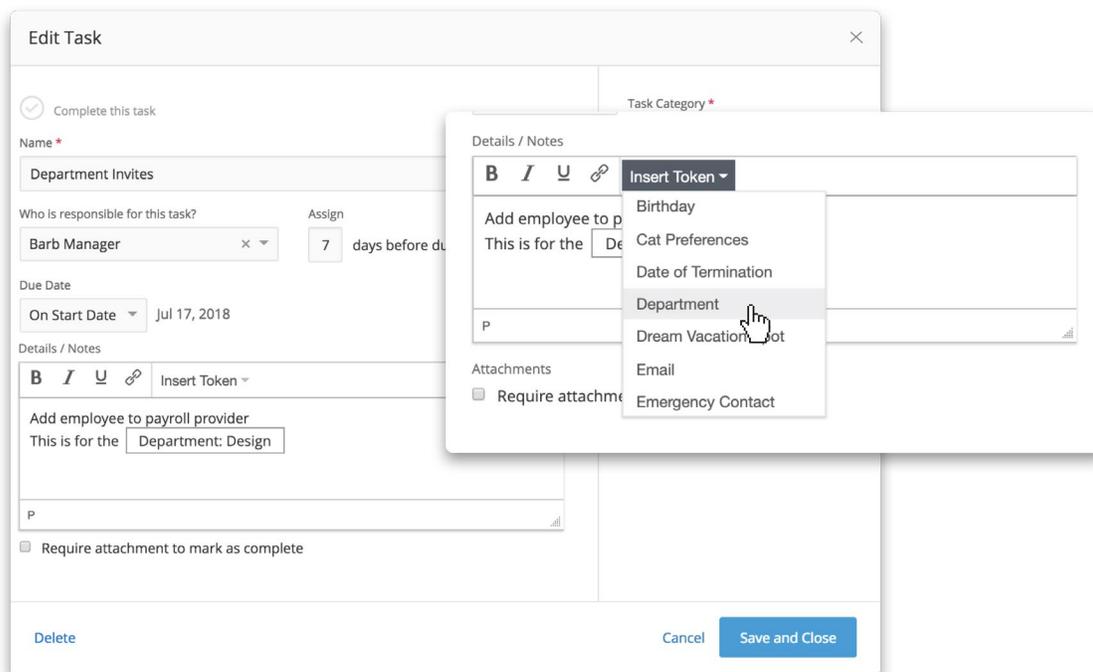
Anyone who can edit a task can add a token for a custom field into the body of the task.

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Assign Dates

Onboarding Plans are centered around a new hire's start date, but previously, not all pieces of the Greenhouse Onboarding Plan could be assigned relative to the new hire's start date. By adding assign dates on E-signature requests, and new hire emails, you can engage with your new hire on the schedule you want, and make sure they are only seeing specific content, like an i9, when it's relevant.

Edit E-Signature Template ✕

Step 3 of 3
Add to Onboarding Plan `ON` ⬤

Assign Date *

| Custom ⌄ | 1 | Day | Before ⌄ | Start Date |

Applies to new hires whose

Department matches   ✕ Finance ⌄

Location matches   Any Location ⌄

Employment Status
matches   ✕ Temporary ⌄

Other Criteria matches   Any Other Criteria ⌄

Cancel   **Save**

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Custom Employment Status

Accurately representing your workforce is essential when building out custom Onboarding Plans. Employment Status today is a set list that includes full time, part time, intern, contractor and temporary.

Customizing Employment Status will give you more flexibility on how your new hires are represented, and better accuracy when building out custom onboarding plans for your new hires. With Custom Employment Status, you'll be able to be more specific and provide more details, like differentiating between hourly and salaried contractors and full-time employees.
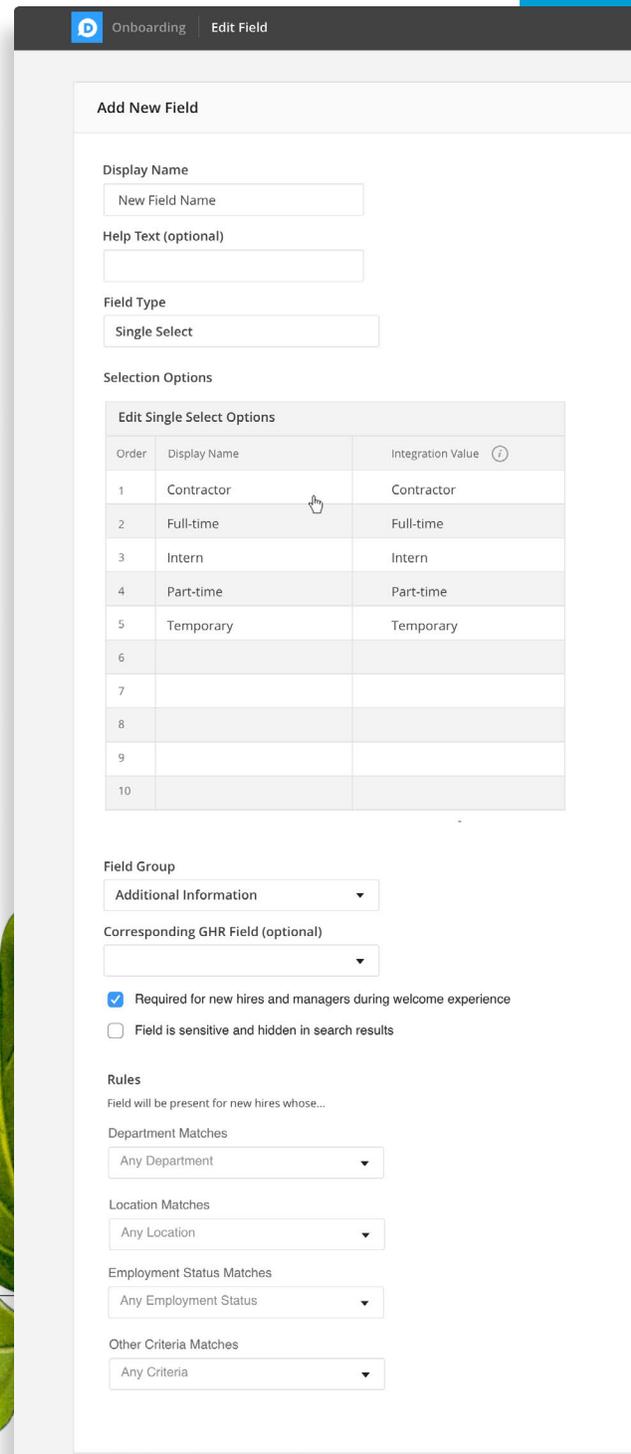
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Onboarding **Edit Field**

Add New Field

Display Name

New Field Name

Help Text (optional)

Field Type

Single Select

Selection Options

Edit Single Select Options

Order	Display Name	Integration Value ⓘ
1	Contractor	Contractor
2	Full-time	Full-time
3	Intern	Intern
4	Part-time	Part-time
5	Temporary	Temporary
6		
7		
8		
9		
10		

Field Group

Additional Information ▼

Corresponding GHR Field (optional)

▼

☑ Required for new hires and managers during welcome experience

☐ Field is sensitive and hidden in search results

Rules

Field will be present for new hires whose...

Department Matches

Any Department ▼

Location Matches

Any Location ▼

Employment Status Matches

Any Employment Status ▼

Other Criteria Matches

Any Criteria ▼

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Other Criteria

A core part of the Onboarding Criteria, Other Criteria is the data that drives automation in Greenhouse Onboarding. As it stands today, Other Criteria cannot be received from Greenhouse Recruiting, requiring HR teams to manually edit new hire records before processing them.

We'll be opening up Other Criteria so that any field can be considered Other Criteria. This will allow Greenhouse Onboarding users to gain value from Greenhouse Recruiting, and make Onboarding Plans more powerful by letting you be more specific about your onboarding plans.

Food Allergies

Display Name *

Food Allergies

Help Text

Field Type *

Short Textbox 🔒

Field Group *

Additional Information ▾

Corresponding GHR Field (optional)

Select... ▾

☐ Required for new hires and managers during welcome experi
☐ Field is sensitive and hidden in search results
☑ Available for Onboarding Criteria

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We Value Your Feedback

We are always looking to work with companies to gain feedback to guide our roadmap and future releases. To get more involved in the Greenhouse development process:

- Subscribe or "Follow" **Greenhouse Release Notes** in the Help Center ⊙
- Join the **Greenhouse Ivy League** advocacy program ⊙