Fube

GUIDE

# How to set up employee onboarding in Fube



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> Someone's first week always looks the same: you have to register them with the mutual insurer, hand over their laptop, get the contract signed, show them round the warehouse and have someone explain the working hours. Everyone knows it by heart and even so **something always gets missed**, because nobody has it written down.

Fube's onboarding solves exactly that: you write the list of steps with their deadlines **once** and, every time you add a new person, the list appears under their name without you having to do anything.

## Before you start

You need permission for the HR area (onboarding is an administrative area) and you need to be clear about what happens behind the scenes, because this is what confuses people most:

> **When you add an employee, templates are not chosen: all active ones are applied.** When you add an employee, Fube creates **one list for each active template** in your company. There is no selection by job title, role or workplace. If you have three active templates, that person wakes up with three lists.

What you can do is **assign** any other template to them **manually** from their record, as explained in step 6. Between the two, you can cover everything, and that is what step 1 is about.

## Step 1 — Decide how many templates you will have active

Since all active templates are applied to everyone, there are two sensible ways to use them:

**A single active template, the usual one.** This is the default option and the one that works for most companies: a list with the steps common to any new starter. Everyone gets the same one, which is what you want.

**Several active templates that are combined on purpose.** This makes sense when each one covers a different block (one for *Documentation*, another for *Equipment*, another for *Training*) and you want them all to be applied every time. Here the combination is not a side effect: it is by design.

What **does not** work is having a *Sales* template, a *Warehouse operative* template and an *Intern* template active, thinking that each person will get their own. They will get all three. If you need lists by profile, leave only the common one active, **deactivate the profile ones** and assign each person theirs from their record (step 6). A deactivated template is not applied automatically, but it can be assigned manually.

## Step 2 — Create the template

Go to **Team > Documents > Onboarding templates** and click **Create onboarding template**.

There are only three things to decide: the **name** (which is what you will see in each employee's list, so give it a recognisable one: *Standard onboarding*), a **description** for your own team, and the **Active** toggle.

That toggle is what counts. **A deactivated template is not applied to anyone**, but it is kept intact with all its tasks: it is the way to save a list you only use now and again.

## Step 3 — Write the tasks, with their deadline and order

Tasks are found in **Team > Documents > Template tasks**. Click **Create template task**, choose which template it belongs to and fill in:

- **Title** — the action, in the imperative and specific: *Hand over laptop and login details*.
- **Description** — details of who does it and how, if needed.
- **Days until due date** — how many days after the start date that task is due.
- **Order** — its position in the list.

**The days until the due date are counted from the employee's start date, not from the day you enter them in Fube.** This is a difference that matters: if on 20 September you register someone who started on the 1st, their 'day 0' tasks are already overdue when they are created, which is exactly what you want to see.

They are calendar days, but **a deadline never falls on a day that person does not work**: if it lands on a weekend (according to their schedule) or a company holiday, it moves to the next working day. A task due one day after a Friday start is due on Monday, not Saturday. Days and order cannot be negative either.

And if **the employee's record has no start date**, deadlines are counted from the day you add them in Fube. For them to count from their actual start, always fill in the start date, as explained in the guide to **adding an employee**.

## Step 4 — Add the person and the list appears automatically

There is nothing to do here: adding the employee is what triggers the creation. As soon as you save their record, Fube generates their list (or lists) with all the tasks from each active template, their deadlines already calculated and all marked as pending.

If you change a template later on, **lists already created are not affected**. They are an independent copy from the moment the employee was added, which is correct: a March onboarding should not be rewritten because you added a step in June.

## Step 5 — Complete each person's tasks as you go

Each employee's list is opened from their record, in the **Onboarding** tab. There you will see:

- A **progress** bar with the count (*4 of 9 tasks completed*) and its percentage.
- Each task with its title, its description and its **Due on** date when it has a deadline.
- A **Complete task** button on each one: it marks it as done, crosses it out and updates the progress.

When none are left pending, the **Onboarding completed** badge appears. It is a checklist, not an approval workflow: nobody has to sign anything, just tick things off. And it works both ways: if a task becomes pending again, or a new one is added to the list, the list is no longer completed.

## Step 6 — Assign or remove a plan manually

On the same **Onboarding** tab of the record you'll find the **Assign plan** button. Choose the template —active or not— and Fube creates the checklist in that person's name with all its tasks, just as it does when they are added. It's useful for giving each profile its own template, for anyone who was already on board when you created the template, or for a plan that isn't about onboarding, such as a change of role.

Two details:

- **Deadlines are counted from the start date if it hasn't arrived yet; otherwise, from today.** Someone who has been with you for a year won't see every task overdue on day one.
- **The same template can't be assigned twice** to the same person: Fube warns you that they already have it.

To remove a checklist, click **Remove** on its card and confirm. That checklist is deleted, along with its tasks and whatever had been completed; the template stays as it is. Assigning requires permission to create onboarding, and removing requires permission to delete it.

## Edge cases and common mistakes

- **You created the template after adding the person.** Their checklist isn't created automatically: that happens at the moment they are added. Assign it from their record with **Assign plan** (step 6).
- **Three checklists appear when you expected one.** You have three active templates. Deactivate the ones you don't want applied to everyone.
- **The deadlines don't match the onboarding.** That person's record was missing the start date, so deadlines were counted from the day you added them in Fube. Adjust the deadline of those tasks manually and fill in the start date for next time.

- **You want to reorder a specific person's checklist.** The order comes from the *Order* field of the template's tasks and can't be reordered per employee. If the order matters a lot, fix it in the template and it will apply to future onboardings.
- **The template is active but has no tasks.** An empty checklist will still be created in the employee's name. Add the tasks to the template before the first new starter.

## Frequently asked questions

### Can I have different templates for each role?

Yes, but they aren't chosen when adding someone: every **active** template is applied to each new person. For role-specific ones, leave them deactivated and assign each person theirs from their record (step 6).

### Are the documents I collect during onboarding stored here?

No. The signed contract, the modelo 145 or the copy of the DNI go into the person's document file. You'll find this in the guide on how to **file your employees' documents**.

### Can the employee see their own onboarding checklist?

The checklist is an HR tracking tool: it's viewed from the employee's record, in the administrative area. What the person does see in their space are their clock-ins, their schedules, their absences and their documents, as explained in the guide to the **employee portal**.

### Is anyone notified when a task is due?

There are no automatic reminders for onboarding tasks. The deadline is there so that, when you open the checklist, you can see at a glance what is overdue.

### Can I delete a template I no longer use?

You can, and the checklists already created from it stay as they were, with their name and tasks. Even so, it's usually better to **deactivate it**: it stops being applied to new starters, you keep its tasks in case you need it again, and you can still assign it manually.

## Write it once and stop having to remember

Half an hour setting up the template pays for itself on the first onboarding where you don't forget anything. And if you take away only one idea from this guide, make it this one: **every active template is applied to every new starter**, so keep only the common one active and assign each profile's templates manually.

You'll find the whole module under **employees**, within **Fube's Time tracking and HR**. And if you haven't set it up yet, **create your free account** and have the checklist ready before your next new starter.

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