Estaff365 Onboarding Checklist

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Account Creation & Setup

- [ ] Create company account in eStaff365
- [ ] Configure organization profile
- [ ] Set up company branding
- [ ] Upload company logo
- [ ] Configure custom fields
- [ ] Set up departments/divisions
- [ ] Create location profiles
- [ ] Configure time zones
- [ ] Set up cost centers
- [ ] Define job categories
- [ ] Create position templates
- [ ] Configure approval workflows

User Administration

- [ ] Create admin user accounts
- [ ] Set up HR user roles
- [ ] Configure manager accounts
- [ ] Define permission levels
- [ ] Set up security groups
- [ ] Configure password policies
- [ ] Enable two-factor authentication
- [ ] Set up single sign-on (SSO)
- [ ] Create user groups
- [ ] Configure access controls
- [ ] Set up audit trails
- [ ] Define data retention policies

System Configuration

- [ ] Configure leave types
- [ ] Set up public holidays
- [ ] Define work schedules
- [ ] Configure overtime rules
- [ ] Set up allowances
- [ ] Define benefit plans
- [ ] Configure payroll settings
- [ ] Set up tax tables

- ☐ Define pay grades
- ☐ Configure currency settings
- ☐ Set up notification rules
- ☐ Enable system integrations

Employee Data Migration

- ☐ Prepare employee data template
- ☐ Clean and validate data
- ☐ Map data fields
- ☐ Import employee records
- ☐ Upload employee photos
- ☐ Import employment history
- ☐ Load leave balances
- ☐ Import salary information
- ☐ Upload documents
- ☐ Verify data accuracy
- ☐ Run validation reports
- ☐ Correct any errors

Module Activation

- ☐ Enable Core HR module
- ☐ Activate Leave Management
- ☐ Set up Time & Attendance
- ☐ Configure Payroll module
- ☐ Enable Performance Management
- ☐ Activate Recruitment module
- ☐ Set up Learning Management
- ☐ Configure Expense Management
- ☐ Enable Employee Self-Service
- ☐ Activate Manager Self-Service
- ☐ Configure Mobile App
- ☐ Enable Analytics Dashboard

Workflow Configuration

- ☐ Set up leave approval workflow
- ☐ Configure expense approval
- ☐ Define onboarding workflow
- ☐ Set up offboarding process
- ☐ Configure performance review cycle
- ☐ Define recruitment workflow
- ☐ Set up document approval
- ☐ Configure timesheet approval
- ☐ Define training request workflow
- ☐ Set up change request process
- ☐ Configure notification workflows

- ☐ Test all workflows

Integration Setup

- ☐ Configure payroll integration
- ☐ Set up accounting system link
- ☐ Connect time clock systems
- ☐ Integrate with Active Directory
- ☐ Set up email integration
- ☐ Configure document management
- ☐ Connect recruitment portals
- ☐ Set up API connections
- ☐ Configure data exports
- ☐ Enable third-party apps
- ☐ Test all integrations
- ☐ Document integration points

Training & Rollout

- ☐ Schedule admin training
- ☐ Train HR team
- ☐ Conduct manager training
- ☐ Create employee guides
- ☐ Develop training materials
- ☐ Record training videos
- ☐ Set up help documentation
- ☐ Configure support channels
- ☐ Plan phased rollout
- ☐ Communicate to employees
- ☐ Conduct pilot testing
- ☐ Gather feedback

Testing & Validation

- ☐ Test user access
- ☐ Verify workflows
- ☐ Test leave applications
- ☐ Process test payroll
- ☐ Verify reports
- ☐ Test mobile app
- ☐ Check notifications
- ☐ Validate integrations
- ☐ Test data security
- ☐ Verify backup systems
- ☐ Conduct UAT
- ☐ Sign off on setup

Go-Live Preparation

- ☐ Finalize data migration
- ☐ Complete all testing
- ☐ Train all users
- ☐ Set go-live date
- ☐ Prepare contingency plan
- ☐ Create support schedule
- ☐ Document known issues
- ☐ Prepare FAQs
- ☐ Set up monitoring
- ☐ Plan post-implementation review
- ☐ Schedule health checks
- ☐ Celebrate successful launch