Preboarding Organizational Unit Configurations Starter Guide

Preboarding Organizational Unit (OU) Configurations help simplify the maintenance of Onboarding Workflows. Preboarding OU Workflows are focused on placing a new hire into the OUs they should be in prior to their hire date, minimizing the need to have various Onboarding Workflows configured with this information.

Admin View

The Preboarding OU Configurations can be enabled from the Onboarding Workflows page (Admin > Tools > Onboarding > Onboarding Workflows). Once enabled, a new page, Preboarding Organizational Unit Configurations, will be available on the Onboarding page. Additionally, following enablement, any new and existing Onboarding Workflows will not have the temporary OU section included on the page.

On the Create Preboarding Organizational Unit Configuration page, you’ll enter in a Title, Description, Preboarding OU, and Availability.

The Preboarding OUs are going to be the temporary Organizational Units the new hire will be placed in until their Hire Date. This lets the new hire complete any training and tasks related to their OU prior to their first day.

The Availability section determines which Preboarding OU Configurations will be available to place the new hire in when the Start Onboarding process has begun. For example, if you set up the Availability for the position, Account Manager, when you Start Onboarding, only new hires whose Position is Account Manager will be able to be added to that Preboarding OU Configuration workflow.
Onboarding View

When you’re ready to start the onboarding process for a new hire, the steps are the same as before. Select the Start Onboarding option from the new hire’s Applicant Profile. On the Start Onboarding page, you’ll notice a new section at the bottom, Preboarding Organizational Units. When you click the Select Preboarding OU Configuration button, a flyout appears with the available Preboarding OU Workflows. As a reminder, the Preboarding OU Workflows available are based on the Availability set when creating the Preboarding OU Workflow. For example, if you set the Availability to the Position, Account Manager, and the new hires OU Position is set to Account Manager, you would see that Preboarding OU Workflow.
Once the Preboarding OU Workflow has been added, the Preboarding OU data populates. The OUs shown in this section, will be the OUs the new hire is part of until their actual Hire Date. Upon their Hire Date, the new hire will be moved into their appropriate OUs. These OUs are set at the top of the Start Onboarding page, in the Organizational Units section.

**Permissions**

There is one new permission related to Preboarding OU Configurations.

**Permissions:**
- Preboarding Organizational Units - Manage
  - Grants the ability to access and manage Preboarding OU Configurations.

**Enablement Notes**

The Preboarding Organizational Unit Configurations page will be disabled by default in your Production and Pilot portals, and automatically enabled in your Stage portal. You can self-enable the page from the Onboarding Workflows page. Once enabled, users that have the Onboarding Workflows – Manage permission will automatically get the Preboarding OUs – Manage permission. All temporary OUs set in Onboarding Workflows will be removed. With the October '17 Release, the Preboarding Organizational Unit Configurations page will be automatically enabled in all portals.

**Use Case**

Jessica, a Talent Coordinator at Acme, facilitates the onboarding processes for new hires within the United States. At Acme forms are standard for new hires within the United States, the only difference is whether the new hires work at headquarters or if they are remote. Peter has recently been hired as a Sales Representative working out of headquarters, and Helen has been hired as a Customer Success Manager working remotely. To accommodate for the different forms for each new hire, Jessica has configured the Onboarding Workflows. She has also configured the different Preboarding OUs they’ll be in during Preboarding and set their availability accordingly. As Jessica starts onboarding for each new hire, she selects the Onboarding Workflow and the Preboarding OUs for the new hires based on what is available to them. Moving forward she can keep the Onboarding Workflows she previously created, and add new Preboarding Workflows for the other positions they plan to hire.

**Impacted Areas**

- Onboarding
- Onboarding Workflow
- Start Onboarding