



## Getting Started with Allboarder

Get ready to give your new hires the smoothest onboarding experience while saving your team time and increasing productivity for all! **Allboarder** is the perfect solution designed for HR professionals and hiring managers to combine the power of automation and collaboration to have your newest players up and running in record time.

Login [here](#) to get started!

### How does Allboarder enrich the onboarding process?

- We create reusable templates for onboarding tasks, meetings and materials to simplify using them as many times as your team needs.
- We streamline onboarding through automation to help your hiring managers and HR team spend less time on repetitive tasks and save money.
- We empower your new employees to become confident and productive contributors starting on day one.
- We conveniently integrate with popular business platforms like Google Workspace and Microsoft 365 for a seamless scheduling process.

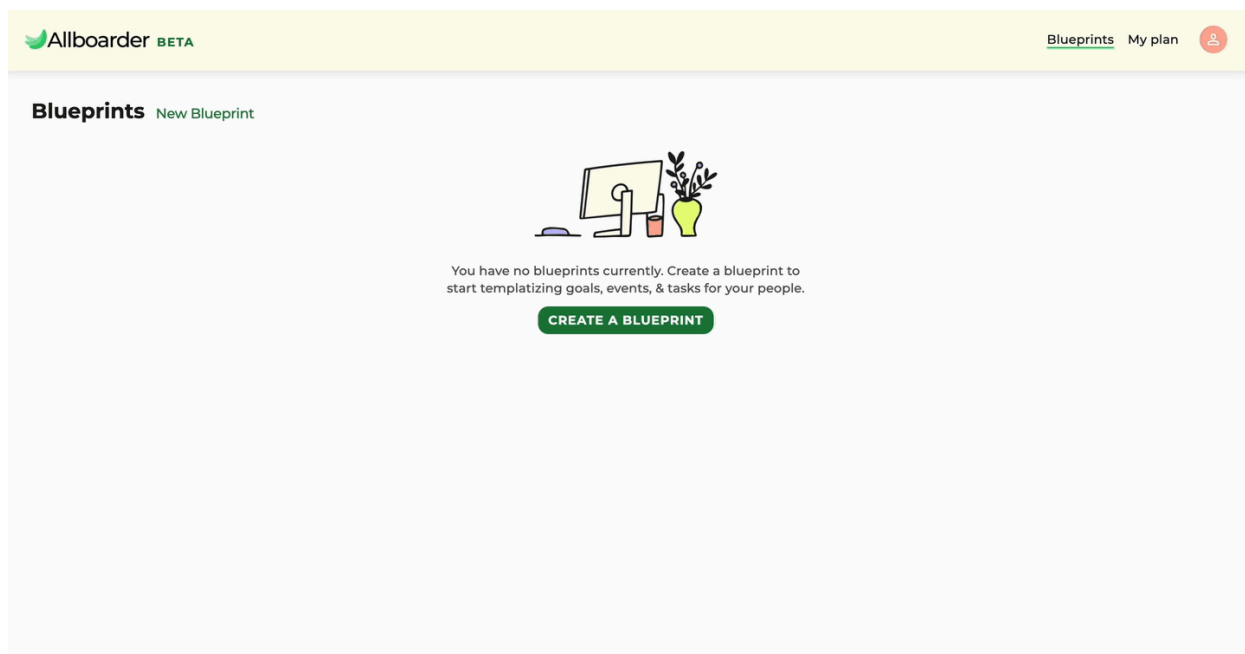
### Setting up your account

By [logging into Allboarder](#) with your Google Workspace or Microsoft 365 account for the first time, you'll be automatically integrated with Allboarder and can immediately get started.

## 1. Create a Blueprint

A **Blueprint** will allow you to templatize your goals, events and tasks for an onboarding, training, or other program. This prevents you from manually creating this same sequence over and over in your calendar and other documents every time you have a new employee or group of employees.

Click **Create a Blueprint** to give it a name and get started.



To start, the Blueprint will have a built-in first section (Section 1) that allows you to:

- Add Goals
- Organize Events day by day
- Create Tasks

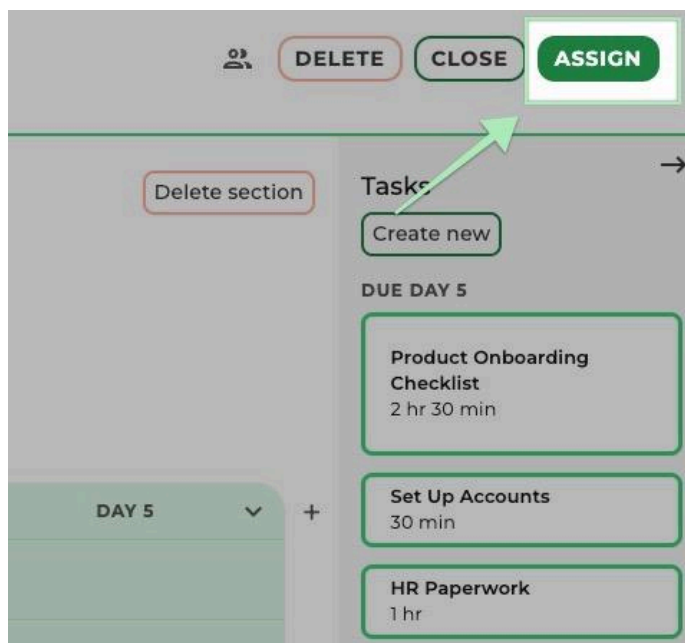
Additional sections with the same structure can be added to the same Blueprint as needed — just click on the **Add section** button at the bottom of the screen.

To exit the Blueprint area, click the **Close** button on the top right of the page.

💡 Learn more:  
[How to use Blueprints](#)

## 2. Assigning to Employee(s)

When you're satisfied with the Goals, Events and Tasks you've entered into your Blueprint, click on the green **Assign** button on the top right of the Blueprint Builder to get started with inviting assignees. When you select a start date and add one or more assignees, your Google or Microsoft calendar will create the sequence of meetings that are in the Blueprint, and invite all of your assignees to those meetings. Allboarder will also send the assignees all of the blueprint tasks, which will show up in their Google or Microsoft tasks. And last but not least, all Blueprint goals, tasks, and events will be added to the employee's "My Plan," in Allboarder.



💡 Learn more:  
[How to Assign a Blueprint](#)

## 3. Manage a Group

By assigning a Blueprint to one or more people, you have created a "group" or cohort that you can manage through Allboarder. You are able to see and manage

the groups/cohorts by clicking on **View by start date** (calendar icon) in the **Actions** menu from your [Blueprint Library](#) next to your Blueprint.



This page will display an overview of cohorts scheduled for upcoming start dates, as well as a history log of past groups who's start dates have passed. You'll be able to add or remove assignees to existing groups (start dates) as well as create new ones. You can also view your employee's **My plan** by clicking on their email within the group.

💡 Learn more:  
[Group Management](#)

#### 4. View an Employee's Plan

[My Plan](#) is the dedicated area where your team (or assignees) can access the Blueprint(s) assigned to them. Sometimes employees are assigned multiple Blueprints during new employee onboarding. Allboarder takes all goals, events and tasks and displays them as one, unified plan, to make it easier for the employee to understand, and for the leadership team to see everything the employee must do at one glance.



## My plan

Today

View past ▾

### Week of Sep 2 - 9, 2024

- Get fully set up within the systems and platforms needed to complete your core job functions.
- Learn the product through our Product Onboarding Checklist process.
- Meet with key stakeholders in our company and get to know your new team!

SEP 2	9-10	Welcome Intro w/ Our CEO
	10-10:30	Meet Jake Taylor, CTO
	11-11:30	Work on Product Onboarding Checklist
	2-3	Customer Success 101
	3:30-4	Meet Mo Randall, CMO

SEP 3	11-11:30	Work on Product Onboarding Checklist
	1-1:30	Meet London Briggs, COO

SEP 4	9:15-9:45	Meet Bob Roberts, CFO
	11-11:30	Work on Product Onboarding Checklist
	1-1:30	Support Huddle

SEP 5	11-11:30	Work on Product Onboarding Checklist
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SEP 6	11-11:30	Work on Product Onboarding Checklist	<input type="radio"/> Set Up Accounts
	1-2	All-Team Meeting	<input type="radio"/> HR Paperwork
	3-4	Onboarding Week Check-in	<input type="radio"/> Product Onboarding Checklist

### Past Due Tasks

- ☐ Product Onboarding Checklist  
due Aug 8, 2024
- ☐ HR Paperwork  
due Aug 8, 2024
- ☐ Set Up Accounts  
due Aug 8, 2024

After receiving an invitation from Allboarder via email and logging in, they will be able to efficiently navigate through their onboarding journey right from our platform.

We encourage you to explore our in-depth articles below to learn how to maximize the use of each feature in Allboarder. Our goal is to simplify the scheduling process of any type of event and task management that's part of your day-to-day, and we're so excited to have you!

## Related Articles:

[How to use Blueprints](#)[How to Assign a Blueprint](#)[Group Management](#)[My Plan](#)