




Checklist

	Task	Link	Done	Show me	Notes
1	Setup your account	GO	✓		
2	Start date for registrant	GO			All employees need an employment start date but DON'T GET CARRIED AWAY AND CHANGE EVERYTHING – JUST THE START DATE FOR THE EMPLOYEE
3	Licences	GO			Each employee needs a licence; your licences may be added for you by one of our partners.
4	System Functionality	GO			If you want some software areas and not others, this is where you turn them on and off. Some modules need atleast one employee to have a corresponding Functionality Role to manage them (People > employee name > person (dropdown) > Functionality Roles)
5	Countries	GO			Add the countries you operate in and their time zones
6	Calendars	GO			We suggest you add a new calendar starting from the beginning of your leave year.
7	Work Patterns	GO			Each employee will need their work pattern added. They should be named to describe the pattern e.g. the employees name or Monday to Thursday 9-5 1hr lunch
8	Groups	GO			Optional: Remember that managers aren't usually in the dept they manage (e.g. need 'sales manager' and 'sales team' groups) otherwise the manager will approve their own leave. Groups are also added when using People Bulk (step 18)
9	Areas	GO			e.g. by office, by region, by sales areas depending on how you wish to see the reports. Normally the preinstalled Global Area is sufficient
10	Delay emails	GO			By delaying welcome emails you can setup the new starter and their welcome email isn't automatically released until your manually send it. This is useful to check their account before giving them access.
11	Absence Types	GO			If you need any that we haven't included already just let us know
12	Absence Rules	GO			It is best to set the rules as Warnings at first – Mandatory rules will not allow anyone to approve the leave when they fail. Enough remaining entitlement and leave overlap are preinstalled mandatory rules.
13	Annual Increments	GO			The pattern of additional entitlement based on number of years service that should be automatically added at the start of each leave year.
14	Mandatory Leave	GO			A calendar that holds forced absences such as those around the Christmas period
15	Sickness	GO			A finer control of what is required when someone is absent due to sickness
16	Core defaults	GO			Default settings used when adding a new employee. Further default settings for leave found here
17	Edit the registrant	GO			It is time to edit the details of the only person added with the information added above i.e. group, work pattern and calendars.
18	People Bulk	GO			You will have a chance to check the import before committing to it

19	People Individual	GO			If you only want to add a few employees (<15), this is the best method.
20	Managers	GO			Set the group managers by clicking Edit next to each Group and updating the manager of that group.
21	Send Welcome emails	GO			As soon as the welcome emails are sent the site should be considered live