

Checklist

	Task	Link	Done	Show me	Notes
1	Setup your account	GO	<input checked="" type="checkbox"/>		
2	Start date for registrant	GO	<input type="checkbox"/>		All employees need an employment start date but DON'T GET CARRIED AWAY AND CHANGE EVERYTHING – JUST THE START DATE
3	Licences	GO	<input type="checkbox"/>		Each employee needs a licence; your licences may be added for you by one of our partners.
4	System Functionality	GO	<input type="checkbox"/>		If you want some software areas and not others, this is where you turn them on and off
5	Countries	GO	<input type="checkbox"/>		Add the countries you operate in and their time zones
6	Calendars	GO	<input type="checkbox"/>		We suggest you add a new calendar starting from the 1 st Jan
7	Work Patterns	GO	<input type="checkbox"/>		
8	Groups	GO	<input type="checkbox"/>		Remember that managers can't be in the dept they manage (e.g. need 'sales manager' and 'sales team')
9	Areas	GO	<input type="checkbox"/>		e.g. by office, by region, by sales areas depending on how you wish to see the reports
10	Delay emails	GO	<input type="checkbox"/>		By delaying welcome emails you can always setup the new starter before the email account is setup
11	Absence Types	GO	<input type="checkbox"/>		If you need any that we haven't included already just let us know
12	Absence Rules	GO	<input type="checkbox"/>		It is best to set the rules as Warnings at first
13	Annual Increments	GO	<input type="checkbox"/>		Additional entitlement based on number of years service
14	Mandatory Leave	GO	<input type="checkbox"/>		A calendar that holds forced absences such as those around the Christmas period
15	Sickness	GO	<input type="checkbox"/>		A finer control of what is required and when, when someone is absent
16	Core defaults	GO	<input type="checkbox"/>		
17	Edit the registrant	GO	<input type="checkbox"/>		It is time to edit the details of the only person added.
18	People Bulk	GO	<input type="checkbox"/>		You do get a chance to check the import before committing to it
19	People Individual	GO	<input type="checkbox"/>		If you only want to add a few employees (<15), this is the best method.
20	Managers	GO	<input type="checkbox"/>		Set the group managers
21	Send Welcome emails	GO	<input type="checkbox"/>		As soon as the welcome emails are sent the site should be considered live