Go Live - Checklist

Requirements

- ◯ If the employees were activated through simulation during the onboarding process, deactivate them again (leaving only the admins as active users) (Kenjo tech team)
- ◯ If the notifications blocker is on, turn it off so employees can receive the email invitation to join Kenjo (Kenjo tech team)
- ◯ Properly assigned Profile and permissions and views tested using the created test user
- ◯ Account sample and test data deleted
- ◯ Billing details filled out (invoices are updated according to the number of active employees)
- ◯ All necessary Bank Holidays added for the Calendars in use + Calendars linked to Company and/or Office
- ◯ Employees assigned to the corresponding company, office, division, department, and/or team
- ◯ Manager structure created by filling always out to whom each employee "Reports to"
- ◯ Each employees login email is personal and unique

Branding

- ◯ Logo added in Settings (200x60px - 300dpi)
- ◯ Company email signature added
- ◯ Company structure (Company name, Office name, Divisions, Departments, Teams)
- ◯ Company presentation customized in the Welcome wizard

Go Live - Checklist

- ◯ Decide which home widgets to display (and in which order)
- ◯ Standard Orgchart reviewed or edited (or hidden)

Recommendations

- ◯ Customized invitation email added for the Welcome wizard
- ◯ A written public welcome announcement
- ◯ An Employee Handbook published in Company docs, or attached to an announcement, or attached to a workflow with a welcome email for new joiners
- ◯ Agreed features activated (rest as hidden)
- ◯ All document tags were created (Company docs, Payrolls, Contracts, Doctors certificates or other related Time Off documents, etc.)
- ◯ Documents to share with all employees published in the Company docs section (Company presentation, policies, etc.) + tags were linked
- ◯ Employee docs imported (payroll history, work contracts, etc.) + tags were linked
- ◯ Time Off types created, linked to the corresponding employees, and current balances checked for everyone. Work days need to be defined on Company level or Employee level.
- ◯ Agreed settings for attendance tracking and/or overtime calculations configured, activated for corresponding employees, and tested with the created test user
- ◯ Necessary fields and data for the monthly payroll exports selected, set, and tested
- ◯ Added all necessary Workflows, To Do automations, and Email templates + tested to execute from an employee profile

Go Live - Checklist

Nice to have

- Publish a first Shout out for a colleague (click on anyone's public profile view)
- Publish your Company and Department goals
- Create for yourself all useful own views for each section in Kenjo, and save your own custom reports
- A complete workflow for onboarding and offboarding of employees
- An uploaded profile pictures for every employee together with a biography displayed in their public profile

Once all these steps are done, activate your employees in Employees > Select all employees > ACTIONS > Activate employees. In this way, they will receive the welcome email to activate their account, choose a login password, and start using Kenjo.