

Tasks Report

TEMPLATE - Ninja Onboarding — AIS Templates



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For the hire of a new AIS team member and a future Kninja

User Names/Passwords

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
AIS Cloud New User Request to Cory			Andrea H.	Juliet A.		0%	(Not started)
Set up Address via NetAccess NetHost			Admin A.	Juliet A.		0%	(Not started)
Set up user access in Teamwork			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">• Add new user to TW Chat AIS Group			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">• Add new user to Monthly Recurring Bookkeeping Template in Teamwork			Andrea H.	Juliet A.		0%	(Not started)
Network Login - Put in Request to Binarium - Provide Email Address & Name			Admin A.	Juliet A.		0%	(Not started)
Add to Receipt Bank Profile - Access to Existing Clients			Andrea H.	Juliet A.		0%	(Not started)
Add to QBO - Access to Existing Clients			Andrea H.	Juliet A.		0%	(Not started)
Add to HubDoc - Access to Existing Clients			Andrea H.	Juliet A.		0%	(Not started)
Add to QBDT Databases - As needed			Andrea H.	Juliet A.		0%	(Not started)
Add Email to Printer			Admin A.	Juliet A.		0%	(Not started)

Workstation Set Up

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
Assign Desk and Workstation			Andrea H.	Juliet A.		0%	(Not started)
Assign Telephone Extension			Andrea H.	Juliet A.		0%	(Not started)
Confirm Cloud Access & Connection			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">Transaction Pro Uploader			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">QuickBooks – current and prior year versions			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">Sage 50 - current and prior year versions			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none">Set up Outlook/Email on Cloud - including Signature			Andrea H.	Juliet A.		0%	(Not started)

HR Activities

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
Employee Contract			Andrea H.	Juliet A.		0%	(Not started)
Position Contract			Andrea H.	Juliet A.		0%	(Not started)
Complete Employee Information Sheet			Andrea H.	Juliet A.		0%	(Not started)
Determine if business cards are required			Andrea H.	Juliet A.		0%	(Not started)
Review Vacation Policy & Approval Process for Vacation			Andrea H.	Juliet A.		0%	(Not started)

Review Sick Day Policy			Andrea H.	Juliet A.		0%	(Not started)
Review Payroll and Payday Schedule			Andrea H.	Juliet A.		0%	(Not started)
Sync TSheets for new Employee Name to Populate			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> Set up as employee in AIS QBO 			Laurie B.	Juliet A.		0%	(Not started)
Set up employee contact information in Teamwork			Laurie B.	Juliet A.		0%	(Not started)
Add Birthday to Teamwork Birthdays/Anniversaries Project Add as All Day, Recurring Annually			Laurie B.	Juliet A.		0%	(Not started)

Payroll Set Up

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
Set up Payroll File			Laurie B.	Juliet A.		0%	(Not started)
Complete Federal and Provincial TD1 Forms			Laurie B.	Juliet A.		0%	(Not started)
Complete Emergency Contact Form (ICE)			Laurie B.	Juliet A.		0%	(Not started)
File Signed Employee and Position Contracts			Laurie B.	Juliet A.		0%	(Not started)
Obtain Voided Cheque for Payroll Direct Deposit			Laurie B.	Juliet A.		0%	(Not started)

1st Day Orientation

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
Tour of office including fire extinguisher, first aid kit, office supplies, washrooms - Introduction to other Ninjas			Admin A.	Juliet A.		0%	(Not started)

Provide Copy of AIS Life Manual			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Print Manual for Ninja Binder 			Admin A.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight "Let the Games Begin" 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Culture 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Vision 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Working from Home Policy and Parameters 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Hours/Summer Hours 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Importance of Communication 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Review Lunch Time/Min Staff Requirement 			Andrea H.	Juliet A.		0%	(Not started)
Provide Copy of Bookkeeping the AIS Way - QBO/QBDT Version			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Print Manual for Ninja Binder 			Admin A.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Consistency 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Response Time 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Weekly Accounting Meeting 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight Weekly QBO Training 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Outline Hall of Famer Clients 			Andrea H.	Juliet A.		0%	(Not started)
<ul style="list-style-type: none"> • Highlight HST/Payroll Review Process 			Andrea H.	Juliet A.		0%	(Not started)
Provide Logins and Passwords			Andrea H.	Andrea H.		0%	(Not started)
<ul style="list-style-type: none"> • Computer Login Password 			Andrea H.	Andrea H.		0%	(Not started)
<ul style="list-style-type: none"> • Cloud Login & Password 			Andrea H.	Andrea H.		0%	(Not started)

• QBD Login & Password			Andrea H.	Andrea H.		0%	(Not started)
• QBO Login & Password			Andrea H.	Andrea H.		0%	(Not started)
• TSheets Login & Password			Andrea H.	Andrea H.		0%	(Not started)
• Teamwork Login & Password			Andrea H.	Andrea H.		0%	(Not started)
• Receipt Bank Login & Password			Andrea H.	Juliet A.		0%	(Not started)
• HubDoc Login & Password			Andrea H.	Juliet A.		0%	(Not started)
Telephone System			Admin A.	Juliet A.		0%	(Not started)
• Telephone Functions Training			Lead B. Admin A.	Juliet A.		0%	(Not started)
• Provide Telephone Answering Script			Lead B. Admin A.	Juliet A.		0%	(Not started)
• Voicemail Template Script			Lead B. Admin A.	Juliet A.		0%	(Not started)

Office Procedures

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
Distribute new telephone extension list			Admin A.	Juliet A.		0%	(Not started)
How to use Copier/Printer			Admin A.	Juliet A.		0%	(Not started)

Training

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
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Tour of Teamwork Projects			.	Juliet A.		0%	(Not started)
• General Tour of Program			.	Juliet A.		0%	(Not started)
• Detailed Overview of Projects			.	Juliet A.		0%	(Not started)
• How to Add People/Companies			.	Juliet A.		0%	(Not started)
• How to Add/Modify Tasks			.	Juliet A.		0%	(Not started)
• How to Create Subtasks			.	Juliet A.		0%	(Not started)
• How to Create Dependent Tasks			.	Juliet A.		0%	(Not started)
• How to Make Tasks Recurring			.	Juliet A.		0%	(Not started)
• How to BCC Emails into TW Projects and Reasons Why			.	Juliet A.		0%	(Not started)
• Tour of Ultimate AIS Manual and How to Add Content			.	Juliet A.		0%	(Not started)
Tour of Teamwork Calendar			.	Juliet A.		0%	(Not started)
• Information to be stored on Calendar			.	Juliet A.		0%	(Not started)
• How to Add Events/Meetings on Calendar			.	Juliet A.		0%	(Not started)
Tour of TSheets			.	Juliet A.		0%	(Not started)
• How to Clock In/Out			.	Juliet A.		0%	(Not started)
• How to Choose Client/Jobs and Service Items			.	Juliet A.		0%	(Not started)
• Reasons for Descriptions			.	Juliet A.		0%	(Not started)
• How to use the Manual TSheet - eg: Stat Day			.	Andrea H.		0%	(Not started)
Tour of Teamwork Chat			.	Juliet A.		0%	(Not started)
• How/When to Join in a Group Conversation			.	Andrea H.		0%	(Not started)

• How to Start a Conversation			.	Juliet A.		0%	(Not started)
• How to Start a Private Conversation with Multiple People			.	Juliet A.		0%	(Not started)
• How to Delete a Conversation			.	Andrea H.		0%	(Not started)
Tour of AIS Cloud			.	Juliet A.		0%	(Not started)
• How to Login			.	Juliet A.		0%	(Not started)
• Folder Structure			.	Juliet A.		0%	(Not started)
• What is done on the Cloud, and what is done Locally			.	Juliet A.		0%	(Not started)
• Forms & Templates			.	Andrea H.		0%	(Not started)
Outlook Training - Organization of Clients/Folders/Categories			Andrea H.	Juliet A.		0%	(Not started)
AIS Facebook Profile			Admin A.	Juliet A.		0%	(Not started)
• Join QB-HQ Group			Admin A.	Juliet A.		0%	(Not started)
• Join QBO in Quinte Group			Admin A.	Juliet A.		0%	(Not started)
• Join TSheets Group			Admin A.	Juliet A.		0%	(Not started)
• Join HubDoc Group			Admin A.	Juliet A.		0%	(Not started)
• Like AIS Solutions FaceBook Page			Admin A.	Juliet A.		0%	(Not started)
• Like Steve Loates Consulting Facebook Page			Admin A.	Juliet A.		0%	(Not started)
• Like Kninja Knetwork Facebook Page			Admin A.	Juliet A.		0%	(Not started)
NEBS			.	Juliet A.		0%	(Not started)
• Shadow NEBS Payroll Processing			.	Juliet A.		0%	(Not started)
• Advise of NEBS Deadlines			.	Juliet A.		0%	(Not started)

	• Completion of NEBS New Client Application			.	Juliet A.		0%	(Not started)
Wagepoint				.	Juliet A.		0%	(Not started)
	• Shadow Wagepoint Payroll Processing			.	Juliet A.		0%	(Not started)
	• Advise of Wagepoint Deadlines			.	Juliet A.		0%	(Not started)
	• Completion of Wagepoint New Client Application			.	Juliet A.		0%	(Not started)
Plooto				.	Juliet A.		0%	(Not started)
	• Shadow Plooto AP Processing			.	Juliet A.		0%	(Not started)
	• Shadow Plooto AR Processing			.	Juliet A.		0%	(Not started)
Receipt Bank				.	Juliet A.		0%	(Not started)
	• Shadow Receipt Bank Review			.	Juliet A.		0%	(Not started)
	• Shadow Receipt Bank Set Up			.	Juliet A.		0%	(Not started)
	• Shadow Expense Report Creation			.	Juliet A.		0%	(Not started)
HubDoc				.	Juliet A.		0%	(Not started)
	• Shadow HubDoc sync with QBO			.	Juliet A.		0%	(Not started)
	• Shadow Set up of HubDoc Account Connection			.	Juliet A.		0%	(Not started)
Accessing QBO out of our Cloud vs in our Cloud				.	Andrea H.		0%	(Not started)

2 Week Follow Up Activities

Active Tasks

Task	Start Date	Due Date	Responsible	Assigned By	Priority	Progress	Status
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AIS Website Profile			.	Andrea H.		0%	(Not started)
Boardroom Presentation Set up			.	Juliet A.		0%	(Not started)
Provide Office Opening and Closing Procedures			Andrea H.	Juliet A.		0%	(Not started)
Is office key Required?			Juliet A.	Juliet A.		0%	(Not started)

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