



Onboarding FAQs - Stage 1: Kick Off

Introduction

Welcome to the onboarding FAQs for Claromentis. These FAQs are designed specifically for customers who are currently going through onboarding or about to begin the process. The series will answer the common questions we receive on how onboarding works, what to expect, and how to get the most out of your guided build experience.

Your dedicated Onboarding Account Manager will guide you throughout the process, working closely with you to support your build, answer questions, and help ensure your site is set up for long-term success. These FAQs are designed to act as an additional resource alongside that support, giving you a central place to revisit guidance, best practices, and key information whenever you need it.

This is the *Kick off & Install* section of the Onboarding FAQs. Here, you'll find answers to common questions about the early stages of onboarding, including project kick-off, installation, setup, timelines, and what to expect as you begin your guided build experience.

You'll also note that these questions are separated into 5 sections for each stage of Claromentis onboarding:

1. [Kick Off & Install](#)
2. [Basic Training & Build](#)
3. [Content Creation](#)
4. [Pre-Launch](#)
5. [Go Live](#)

If you're still exploring Claromentis and haven't yet started onboarding, we have a separate FAQ tailored for prospective customers that may be more relevant. **Please email sales@claromentis.com for access.**

1. Kick Off & Install

Why is the onboarding process 8 weeks, is there any way we can speed up this process?

- The 8-week timeline is designed to ensure a comprehensive and smooth onboarding process, but it is more of a guideline. While we aim to adhere to this timeframe, the exact duration can vary depending on factors such as:
 - The complexity of your requirements.
 - The speed at which your team can engage with training and feedback.
 - The volume of content that needs to be created and migrated.
- While we can't always speed up the process drastically, we'll work closely with you to ensure each stage is completed efficiently, and we'll address any roadblocks as quickly as possible.
- That said, it's important not to rush through training and the initial setup, as these steps lay the foundation for everything that follows.
- If there is a specific launch date in mind, we recommend discussing this with your Onboarding Account Manager and they may well be able to adjust the timeline accordingly.

What does the Onboarding Service involve?

- Our onboarding service is designed to guide you step-by-step through setting up a fully functional, launch-ready system.
- The exact parameters of what is included in the onboarding will vary depending on what has been agreed by sales. This will be outlined clearly in the kick off call.
- In general, your onboarding package will include the following:
 - A dedicated Onboarding Account Manager to guide you through the process
 - Agreed onboarding deliverables tailored to your project
 - A standard mobile app (or a customised app as an add on)
 - Agreed Server licenses
 - Access to Claromentis University (training courses for each application)
 - Access to Knowledgebase and resources (a set of user guides which detail each aspect of the intranet)
 - Access to Videos which introduce each application
 - 5 tailored Zoom Onboarding Calls with your dedicated Onboarding Account Manager
 - Ongoing technical support
 - Specific add ons (SSO/User sync modules)
- During your onboarding calls, your Onboarding Account Manager will walk you through setup, provide live demos, and answer your questions in real time.

What does a “Guided Build” actually mean?

- With Claromentis, a guided build is a collaborative onboarding approach where you create your intranet step by step, with hands-on support from our experts.
- Rather than leaving you to figure things out on your own, or, on the other end of the spectrum, building everything for you behind the scenes so you don't have any customisation or administrator understanding, we work with you to guide the setup while you stay in control.
- You'll follow a structured plan, meet regularly with an onboarding specialist, and build key parts of your intranet in stages and following clear easy-to-follow checklists, getting feedback and best practice advice along the way.
- This approach helps you get up and running more efficiently, avoid common pitfalls, and ensure your intranet is tailored to how your organisation actually works. Just as importantly, it means that by the end of onboarding, you'll feel confident managing and evolving the platform independently - rather than relying on frequent external support.
- In short, guided build means you're not doing it alone - but you're also not handing it over. It's a balance of support and ownership designed to set you up for long-term success.

Do you offer templates for intranet design?

- Claromentis doesn't offer fixed, off-the-shelf templates in the traditional sense. Instead, we focus on giving you the flexibility to create an intranet that fits your organisation - supported by plenty of guidance and inspiration.
- During onboarding, you'll have access to a design playground featuring a range of example layouts, page structures, and themes. These aren't rigid templates, but they can be easily replicated and adapted, giving you a strong starting point without limiting how your intranet can evolve.
- This approach means you're not starting from a blank page - you can draw on proven designs and best practices - while still having the freedom to customise everything to your brand, content, and users.
- In short, we provide inspiration and building blocks, rather than fixed templates, so you can create something that works best for you.

How many hours do my team need to dedicate to the onboarding process?

- The time commitment can vary depending on your project, but here's a rough minimum estimate to help you plan:
 - **Onboarding calls:** 5 × 1-hour sessions → 5+ hours
 - **Training (Claromentis University):** Core onboarding curriculum → 2+ hours (Additional training may be needed depending on your setup)
 - **Site build:** Approximately 4–6 hours per week over 8 weeks → 32+ hours
 - **Admin & coordination:** Scheduling, communication, and internal alignment → 1–2 hours per week over 8 weeks → 8+ hours

Estimated total:

□ ~47 hours minimum - (or approximately 1 working day a week over 8 weeks).

- While we aim to adhere to this timeframe, the exact duration can vary depending on factors such as: the complexity of your requirements, the speed at which your team can engage with training and feedback and the volume of content that needs to be created and migrated
- We recommend setting aside consistent time each week to keep momentum, while allowing flexibility for your team's day-to-day workload. If helpful, we can also discuss a plan that fits your schedule during your first onboarding call.

Is training needed for all admins? Is it compulsory?

- Training for admins is highly recommended, but it's ultimately up to you.
- We would say it is essential for system admins, as they'll need to manage user permissions, work with us on support issues and system upgrades, and handle troubleshooting.
- For application administrators, there is the option to complete a more basic version of the training + the application they will be managing.
- If you have a smaller admin team, a few key individuals can undergo the training and then pass on their knowledge to others.

- There are also specific "learning pathways" for different roles - such as HR managers, Internal comms etc, should that suit your needs better!
- Training ensures that admins can effectively manage and maintain the system, which is crucial for minimising disruptions as your team uses the platform.

How many people can access Claromentis University?

- It is accessible to all those who have a Discover Login - so up to 10 from your team.
- That said, if you feel like there would be any individuals who would benefit from the Claromentis University training and there aren't enough logins, please do let us know and we can work out a solution for you.

How many admins do we need?

- Typically, we recommend having between 1 to 5 admins for full system management. This allows for adequate coverage and reduces the risk of bottlenecks if one admin is unavailable.
- On Discover Logins - we have 10 as a limit and this can be a mixture of staff roles (IT/HR/Internal Comms)

How often do you do backups? What happens if we lose our data?

- We perform backups once a day, ensuring that your data is regularly secured and can be restored if necessary. Backups are retained for 30 days following this.
- In the event that you lose data or encounter issues, we can roll back the system to a previous version, but this would be a full system rollback, rather than application specific. This minimises downtime, allowing you to quickly recover and resume operations.
- We also have a trashcan function for certain applications like pages, documents and news etc. so any content accidentally removed in these applications can be restored easily (before 30 days) otherwise it is permanently removed)
- Any admin or end user given the ability to delete in this application should be trained on what deletion means and be able to self-rectify.

Is mass document migration included?

- Mass document migration refers to the process of moving large volumes of documents from your existing system into the new platform.
- If you are hosting on-premise, you will be able to do this yourself, and the relevant knowledgebase article to do this can be found [here](#).
- For SaaS, there is a set of criteria that needs to be matched, and if so, we can do this as part of the onboarding process.
 - The total documents size does not exceed 100GB or the available disc space, whichever is smaller
 - We will not include documents metadata in the migration (i.e. we will use file names and folders as basic structure, but will not include metadata, such as document description, alternative documents names, original creators etc)
 - We will not include any changes to document content (e.g. updating external or internal links included in the documents being migrated)
- If this does not match the requirements, this will be a specific custom request.

When do we switch from email to Discover Projects?

- All communication from the moment you get your own Discover logins following the Kick Off call take place in Discover, it's really important that your chosen Intranet management team engages with us on the platform to resolve any issues or queries they have.
- Email may be used for issues such as billing, call scheduling and questions about the contract, but we prefer for most discussions relating to onboarding to take place in our own system.
- We will also get a notification every time there is a new update to the project dashboard via email.

Why do you use Discover Projects instead of email?

- We do this so that we can ensure everything is tracked and centralised, and we all have visibility.
- In the case of absences other onboarding staff can be given access to the project and see everything at once to answer queries rather than relying on email chains that do not have context.
- We really appreciate that it can be an extra step having to login to Discover rather than just firing an email, but it is much faster in the long run this way - any queries can be dealt with immediately, and the whole team can collaborate.

Click here to access 2. Basic Training & Build
FAQs

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