

# Employee Onboarding with Zimyo.





## **Onboarding:**

Onboarding is a human resources industry term referring to the process of introducing a newly hired employee into an organization. Onboarding is an important part of helping employees understand their new position and job requirements. There are many activities that go into the onboarding process, from the job offer to team training.

In Zimyo HRMS, you can create, configure & record timesheets as per the needs of your organization.

		Search Module Org Structure Workflows <b>Onboarding</b> Offboarding Policy Docume		۹ 🕺
Apps		Overview Candidate Onboarding Process Flow Access Rul	e Onboarding Document General BGV Verification Reports	
ashboard Th Benefits	Note: We've merged and automated 'fransfer Documents' with 'C this automation on 5th April.	onvert to Employee' stage i.e. Documents will be automatically transferred to onboard	ing folder of the employees. It'll be live on 5th April. If any candidate fail after "Convert to Employee Stage"; their document	s will be transferred as an impact of
anployees	Offers to Send ()	Candidates in Progress ⓓ	Employee Chobardod  Dropped Candidate Count  Total Candidate distribution chart	Last 180 🗸
Engage Request	C 2 Days Average Time to Onboard	Days     Average Time to Accept Offer	10 8	
Report	<mark>€</mark> 50 % Offer Acceptance Rate <b>①</b>	66 % Onboarding Success Rate @	e Court	
			2 O Total candidate Created In-Progress Onboarded Withdrawn	Blacklisted
	Month wise onboarding count distribution ()	Last 6 Mo 🛩	rotal candidates Created In-Progress Consourced Withdrawn	Last 90 D. V Department V

When you open the onboarding module, you can see the following menus:

#### <sup>01</sup> Overview:

In the overview menu, the admin can view onboarding analytics dashboard where various important onboarding metrics can be tracked to understand the overall process performance and scope of improvement. The parameters are as listed below:

Onboarded in 180 days: Number of employees onboarded during last 30 or 60 days (as per selected filter).



Offer Letter: It shows the number of offer letters sent, accepted, rejected and pending by the candidates.

**Drop-out Rate:** It shows the percentage of people who dropped-out during the process and were not able to complete the onboarding.

Total Candidates: It shows the number of onboarded candidates, blacklisted candidates and the candidates withdrawn during the process.

Candidates Stages: It shows the number of candidates at various onboarding stages which we are going to discuss further.

### <sup>02</sup> Candidates Onboarding:

In the candidate menu, you can view all the candidates with their basic details like designation, department, location, onboarding stage and their onboarding status as shown below:

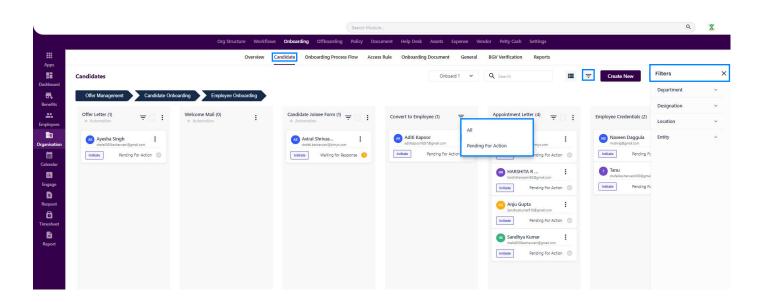
You can view the candidates by filtering as per onboarding workflow type, status, department, designation, location or entity.

> You can search the candidate by their name from the search box.

	Candidate			
AS	CANDIDATE NAME Ayesha Singh	CANDIDATE EMAIL shefali000kesharwani@gmail.com	CANDIDATE DESIGNATION Manager	
Ayesha Singh Manager	CANDIDATE DEPARTMENT HR	CANDIDATE LOCATION Hyderabad	CANDIDATE BUSINESS UNIT ID	
⊴ shefali000kesharwani@gmail.com ▲ N/A	CANDIDATE ENTITY ID Zimyo	JOINING DATE 01-Jan-2023	CANDIDATE CTC 650000	
Hyderabad	SALARY STRUCTURE Manager		Workflow Name Onboard 1	
ining Date 2023-01-01				
epartment HR				
Candidate Details				
Joinee Form				
) Candidate History				
Documents				

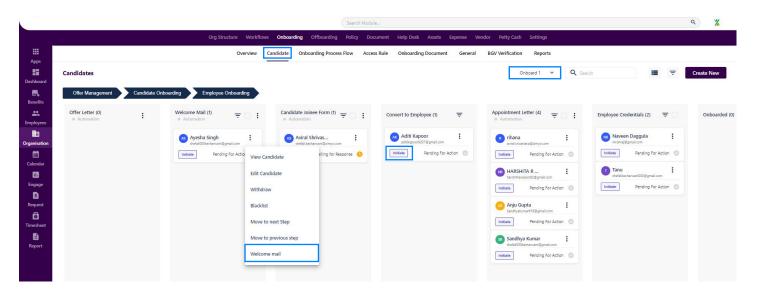


- You can create candidates in bulk, add CTC in bulk or create candidates manually by clicking at the "Create New" button.
- You can choose to view the candidates as per "List view" or "Column view" as shown below.



By clicking at the three dots at the right corner, various actions can be performed at every stage of the onboarding process, as described below:

Welcome Email: Welcome email will be sent to the candidate when he finally joins the organization.





View Candidate: Here, you can view the candidate's history and timeline throughout the onboarding process with details like stages and time of action.

Edit Candidate: Click here to edit candidate details.

Withdraw Candidate: Click here to move candidate to withdrawn at any stage of the onboarding process.

Blacklist: Click here to move the candidate to blacklisted at any stage of the onboarding process.

Add Joinee CTC: Candidates CTC details will be added.

Joinee CTC		Candidate Gun	jan bhola 🛛 🗙
Employee CTC	Monthly CTC	Monthly Gross Salary25000	
Salary Structure General (without PT)	Monthly Deduction	Monthly Net Payable25000	
Applicable From *	Earning	Show on offe	r letter
Enforce ESIC V	0	BASIC	
	Other25000		
	Deduction	Show on offe	r letter
Compute	PF	Employee ESI Cancel	Save

**CTC Approval:** Candidate will be moved to Approved CTC after the CTC is Added by the respective person.



CTC Approval				Candidate Shwetha sriram test
Candidate Details				
Candidate Name	Designation	Department	Location	Candidate CTC
Shwetha srira	ASM	Human Resou	ICICI Delhi	690000
				Show Details ~
				Show Details
CTC Details				
	- Monthly CTC	- Monthly Gross Salar	y	
	57500 ·	55940		
ſ	- Monthly Deduction	- Monthly Net Payable	2	
	1760	54180		
E	Earning			Reject Approve
	HRA	RASIC		

Move to Next Step: Click here to move the candidate to the next onboarding stage.

Move to Previous Stage: Click here to move the candidate to the previous onboarding stage.

Send Offer Letter: Offer letter will be sent to the candidate if shortlisted. After Acceptance of the offer letter will move to next stage of the onboarding process.

Zimyo Consulting Private Limited <noreply@zimyo.com></noreply@zimyo.com>					<b>e</b> D
to me +				9:14 AM (8 hours ago) 🦙	*
	Dear Leena Ab	obas,			
	You were excellent during the impressed with you. We belie to take this position to new he offer you the position of Interr	ve that you have all the eights. For that reason, v	qualities required ve would like to		
	1	Salary Annexure			
	EARNING	Monthly	Yearly		
	HRA	15000	180000		
	BASIC	13000	156000		
	Other	27940	335280		
	Gross	55940	671280		
	DEDUCTION	Monthly	Yearly		
	PF	1560	18720		
	PT.	200	2400		
	Net Payable	54180	650160		
	COMPLIANCES	Monthly	Yearly		
	EPF	1560	18720		
	Total	1560	18720		
	Total	57500	690000		



Send Joinee Form: Joinee form will be sent to the candidate, where he/she can fill the required details.

🗱 Zimyo Candidate Portal			Portal			AS Aviral Shrivastava
( Documents	oinee Form					
Personal Details	Personal Details					
Current Address	Payroll Type	~	Contract End Date		Country Code	~
Bank Details						
Emergency Details	Esi number		- Full Name *		Father Name	
Qualification Details			Profile Picture			
B Work Experience	Mother Name		Choose File No file chosen		Gender	~
Remarks	Date Of Birth		Marital Status	~	Date Of Marriage	
	Nationality	~	PF UAN		20-Dec-2022	
	Blood Group	~	Notice Days		Date Of Gratuity	
						Proceed

Verify Candidate Details: Admin need to verify the filled details of candidate and send for reconsideration if required.

**BGV Aadhar:** Admin need to verify the Aadhar card no. via the portal and OTP will be shared on the registered mobile no. and need to map and verify the same.

Aadhar Verify						Candidate Abcdef	×
	Candidate Name Abcdef	Designation Manager	Department Finance	Location Delhi	Candidate CTC 789098		
	Aadhar Number284786990495				Generate OTP		
	Enter OTP				Verify		
	You will get your OTP shortly						



#### Acknowledgement: A Candidate can submit acknowledgment via the mail.

Zimyo Consulting Private Limited <noreply@zimyo.com> to me +</noreply@zimyo.com>					9:14 AM (8 hours ago) 👾 🍬
	We are offering yo to deductions and and the positions. are required to signed pr possible so that w opproval of your ar of this after and your releasing. We will lit that date.	ect	ngi ac required by thi MPCL ality agreement auch let us know as soon i rocedure after the clate your considera from date of offer of this position open <u>Veany</u> 180000 190000 205200 <b>¢1280</b>	e low you	

**Convert to Employee:** At the last stage of the Candidate onboarding process, click here to convert the candidate to Employee.

			Search Module				٩
Convert to Employee							×
	Candidate Name	Designation	Department	Location	Joining (	Date	
d	Aditi Kapoor	Manager	Admin	Delhi	2023-03	-31	
	<ol> <li>Personal Detail</li> </ol>						
	Personal Details						
on							
	Payroll Type		~	Contract End Date			
	Country Code		~	Esi number			
	Full Name*			Father Name			
	Mother Name			Choose File No file chosen			
				Choose rise No file chosen			
	Gender		~	Date of birth			
						Cancel	Proceed

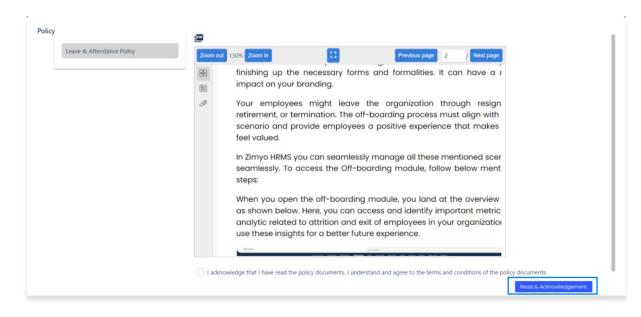
Employee Onboarding: Now the candidate become part of the organization, an employee needs to take further action as per the requirement.

Employee Credential: Share login details with employee to login on the portal.



Order Management Candidate     Other Management     Candidate     Onboarded (0)           Vitthdrawn        Other Management        Candidate           Other Management           Candidate                 Candidate                       Candidate                          Candidate   Candidate	۹ 🎇
Appropried of a clair	
Sector     Offer Management     Condition     Proportionent Letter (4)     Improve     Improve </th <th></th>	
Rest     Important           Important	Create New
mployee	
geniation in the damage gene is and in the d	
Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar and Right Calordar       Image: Calordar and Right Calordar     Image: Calordar and Right Calordar     Image: Calordar       Image: Calordar and Right Calordar     Image: Calordar     Image: Calordar       Image: Calordar and Right Calordar     Image: Calordar     Image: Calordar       Image: Calordar And Right Calordar<	
Image: Constraint of the constr	
Image: Amount of the previous step       Request       Image: Amount of the previous step	
Image: Starting For Action     Move to previous step	
Instance Pending for Action O Wolfe to previous step	
E Soddya Kurar : Employe credentais	
Instate Pending For Action	

Onboarding Kit: Whenever an employee will login on the portal very first time, the system will ask for the acknowledgment on the company's policies.



Request Asset: Required assets will be requested on behalf of the candidate.

"New Request" allow user to a request asset.

Assets Details *		
Location*		•
Category *		,
Type *		
Required On		
Details		
Reason		
	Cancel Submit	



Send Appointment Letter: Appointment letter will be sent to the candidate if offer letter is accepted.

	Search Module	٩	%
Send Appointment Letter		Candidate Rihana	
pps	Entry Name		
board	Zimyo Appointment Letter V		
bard			
fits	File Edit View Insert Format Tools Table Help		
n nyces	S → Paragraph ∨ B I A ∨ E E E E E E E ∨ E ∨ E E Z ② E ∨ ↔ 𝔅 Ω 𝔅		
]	{{company_name}}		
ation	STRICTLY PRIVATE AND CONFIDENTIAL		
dar	Name : abc {{DATE_OF_BIRTH}}		
ge	Dear Mr/Mrs/Ms Raju Kumar Tiwari		
est	We take this opportunity to congratulate you and express our appreciation for your valuable contribution in achieving company objectives. We are confident that you will continue the good work in the same spirit of commitment and sincerity and grow with our organization.		
heet	Your performance review for the period till 30th September,18, finds your performance as "Good". Please be advised that your annual fixed salary has been revised with effect from 1st November,18.		
) ort	×		
	div>div>p 213 words ⊿		
	() Attach		
	Cancel Preview Appointment Letter Send Appointment Letter		

Onboarding Workflow: You can create new onboarding workflows by clicking at the "Create New" button.

	e.	Search Module		۹ 🕺
		Org Structure Workflows Onboarding Offboarding Policy Docume	nt Help Desk Assets Expense Vendor Petty Cash Settings	
Apps		Overview Candidate Onboarding Process Flow Access Ru	ale Onboarding Document General BGV Verification Reports	
Dashboard	Onboarding Process Flow *Onboarding Process Flow* is a way to organ	nize the steps involved in the process where new hires are integrated into the organization.		Active V Create New
<b>Benefits</b>	Name	Total Count	Status	
Benefits	Onboard 1	15	Active	configure Workflow
Employees	Test	<u>Å</u>	Active      Active	configure worknow
Organisation	Test	1	Inactive     Active	:
Calendar				
Calendar				
Engage				
5 Request				
Timesheet				
E				
Report				

You can configure the workflows by clicking at the 3 dots, a new pop-up will appear as shown below where you can add, prioritise the properties as per your organization needs. You can change the status as active or inactive from the drop down at the top right corner. You can also create an onboarding kit for the employees from here, which may include images, documents and videos. Once you are done with all the configuration, click on "Save" button.



foult Workflow fer Management Candidate Onboarding Emplo	oyee Onboarding Onboarding Kit	
Welcome Mail	Mandatory O	Candidate Onboarding
Candidate Joinee Form	Mandatory 💿 💶	Candidate Orboarding is the process of welcoming candidate, collecting information(through a candidate portal) and background screening before converting to employee. The portal expires if the
Verify Candidate Details	Mandatory O	candidate is withdrawn/blacklisted or onboarding is completed.
Aadhaar Verification	🗌 Mandatory 💿 🦲	
Management Approval	🗌 Mandatory 💿 💶	Process How
Convert To Employee	Mandatory 💿 🥌	Welcome Mall O → Candidate Joinee Form O → Verify Candidate Details O →
		Audhaar Verification ()
		Aachaar Werlfcation ()

Access Rule: You can create a new access rule here and configure the existing ones. In any access rule, you can select the steps/actions that you want to include in the onboarding process and you can map the access rule with users in the Users section in next steps.

	New Access Rule				Status	• Active 👻	×
Apps Dashboard		Name*					
Benefits		Pre Onboarding					
Employees		Welcome Mail	Ctc Approval	✓ Offer Letter			
Organisation		Candidate Joinee Form	Verify Candidate Details	Aadhaar Verification			
tein Calendar		Convert To Employee	V Add Candidate Ctc	Management Approval			
Engage		Letter Of Intent Loi					
5		Onboarded					
Request		Background Verification	Employee Credentials	Request Assets			
Timesheet		Transfer Documents		Appointment Letter			
Report							
				Cancel Sav	e		

**Documents:** You can preview and edit document templates from here which will be required during the onboarding process. For eg. Offer Letter, Appointment Letter etc.



		Sea	h Module Q	7.
HII Apps Bis Doubboard Cryployees Employees Employees Cognination Calendar Engage Engage Engage Engage Engage Engage Engage Engage	Templere Name *-         Offer Letter         Header Type         Focter Type         Select bety *-         Zimyo         Digital Signature Required         Subject		File       Edit       View       Inset       Format       Tools       Table       Help         S       Imaggraph       B       I       Imaggraph       Imagg	
			Cancel	Create

**Users:** Here, you can assign access rules created in above section to the sub admin users who'll have access to onboarding module. The users can only perform the steps you defined in the access rule.

	(	Search Module		۹ 🕺
		Org Structure Workflows <b>Onboarding</b> Offboarding Policy Document Help Desk Assets Expense Vendor Petty Cash Settings		
## Apps		Overview Candidate Onboarding Process Flow Access Rule Onboarding Document General BGV Verification Reports		
Dashboard	Access Rule		Active	✓ Create New
₩.	Name	User Status		
Benefits	Test	Shefali • Active 🕶		
Employees	Test	Ayushi Dixit • Active -		Configure Access Rule
Crganisation Crganisation Calendar Cale				Add/Update User

General: Here, you can configure few other settings, like, You can set joining days limit for candidates, sent CC mail to RM or custom for appointment letter & offer letter & reminder to candidates for Joining form.



	Org Structure Workflows <b>Onboarding</b> Offboarding Policy Document Help Desk Assets Expense Vendor Petty Cash Settings	
## Apps	Overview Candidate Onboarding Process Flow Access Rule Onboarding Document General BGV Verification Reports	
55	General	
Dashboard	Configure general onboarding settings here.	
Benefits	Candidate can be created if the joining date lies within last 0 days as of current date	
Employees	- Appointment Yetur maller CC option*	
Organisation	RM	•
Calendar		
	Offer letter mailer CC option*	•
Engage S Request	Send reminder to candidate for joinee form submission after Days of sending the joinee form.	
Timesheet		
B	Joinee form will expire after In Hours Working hours of sending if it is not submitted.	
Report		
		Save

**BGV Verification:** You can search, view, update and download the background verification status and report from here. Background verification can include aadhar BGV, criminal BGV, education BGV or work BGV etc.

**Reports:** You can download and view Candidate Report and Onboarded Employee Report from here as per the entered details.