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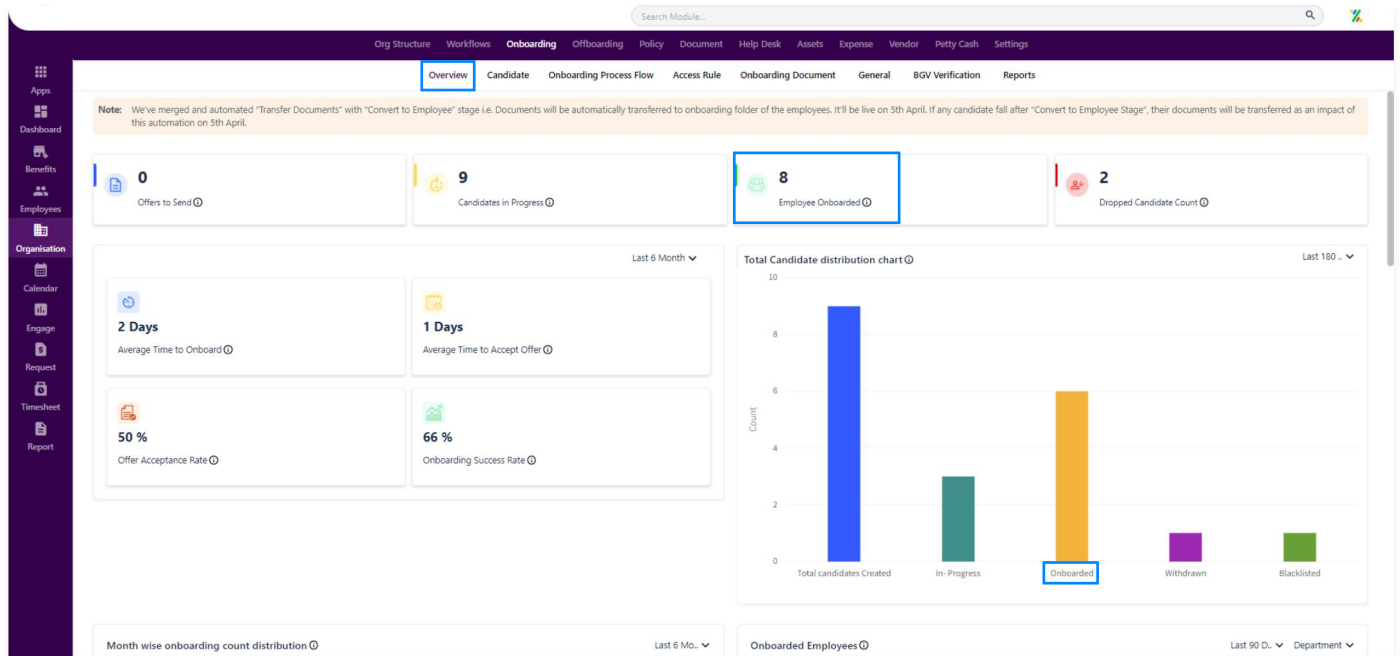
When you open the onboarding module, you can see the following menus:

01 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Total Candidates: It shows the number of onboarded candidates, blacklisted candidates and the candidates withdrawn during the process.
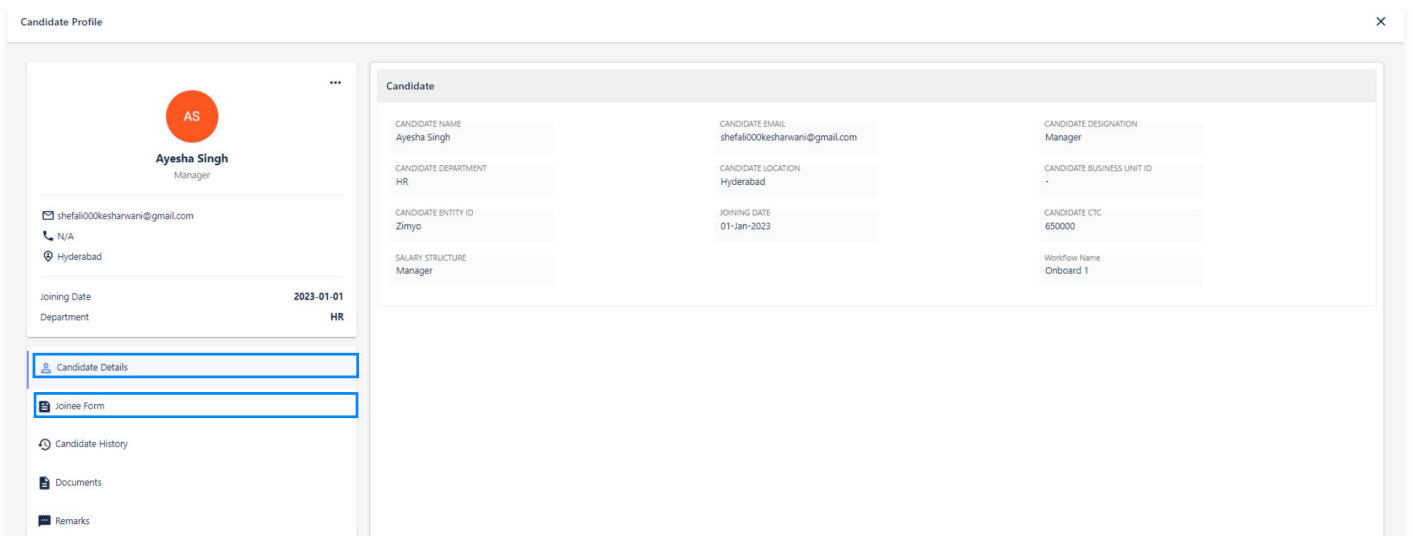
Candidates Stages: It shows the number of candidates at various onboarding stages which we are going to discuss further.

02 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.

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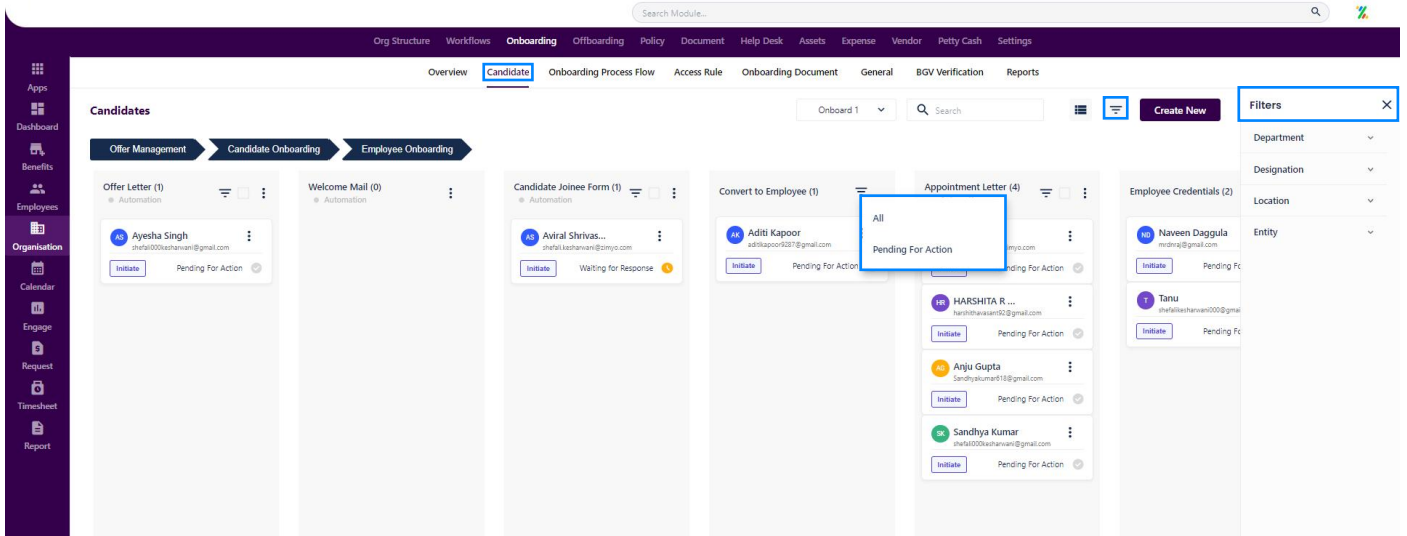
By clicking at the three dots at the right corner, various actions can be performed at every stage of the onboarding process, as described below:

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

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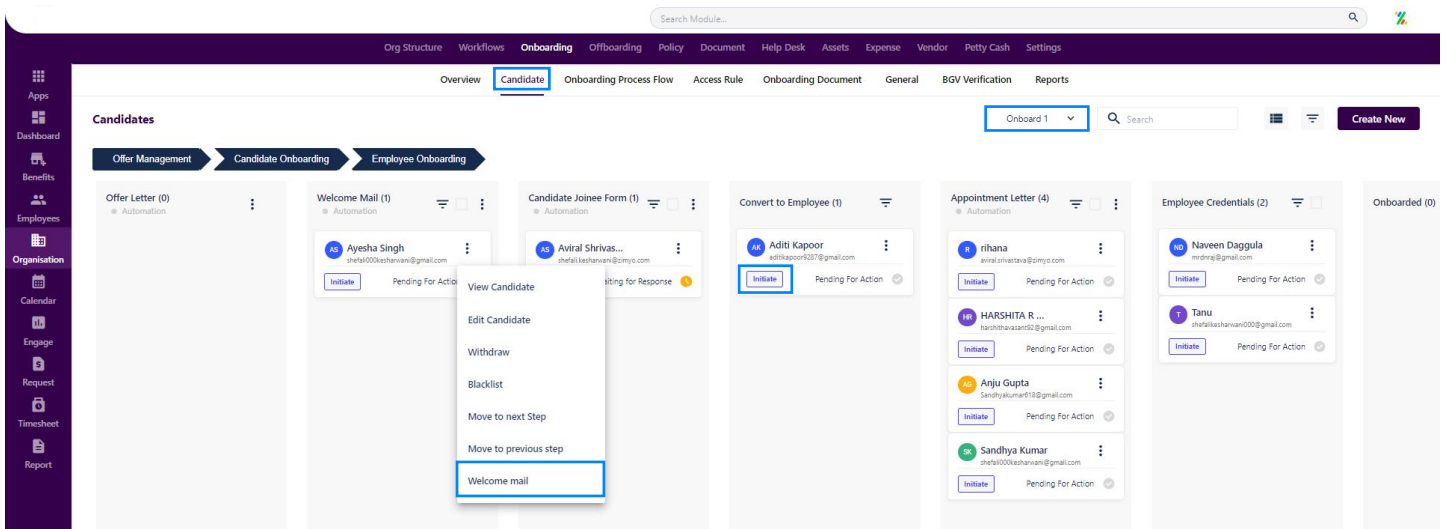
View Candidate: Here, you can view the candidate's history and timeline throughout the onboarding process with details like stages and time of action.

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.

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

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.

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

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.

**Acknowledgement:** A Candidate can submit acknowledgment via the mail.
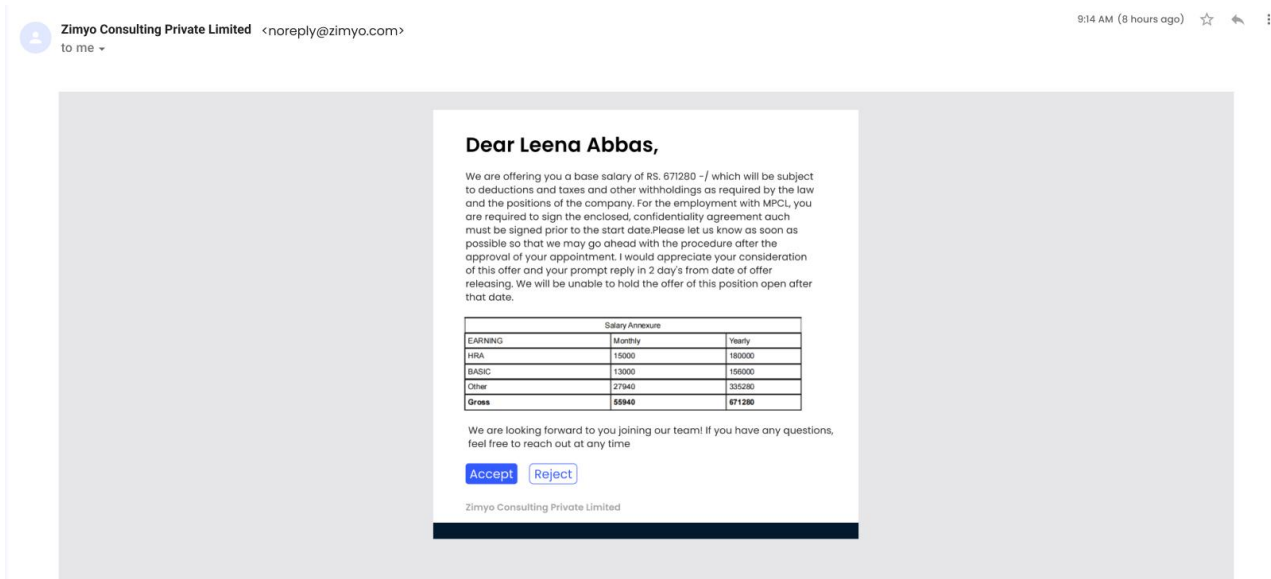
Convert to Employee: At the last stage of the Candidate onboarding process, click here to convert the candidate to Employee.
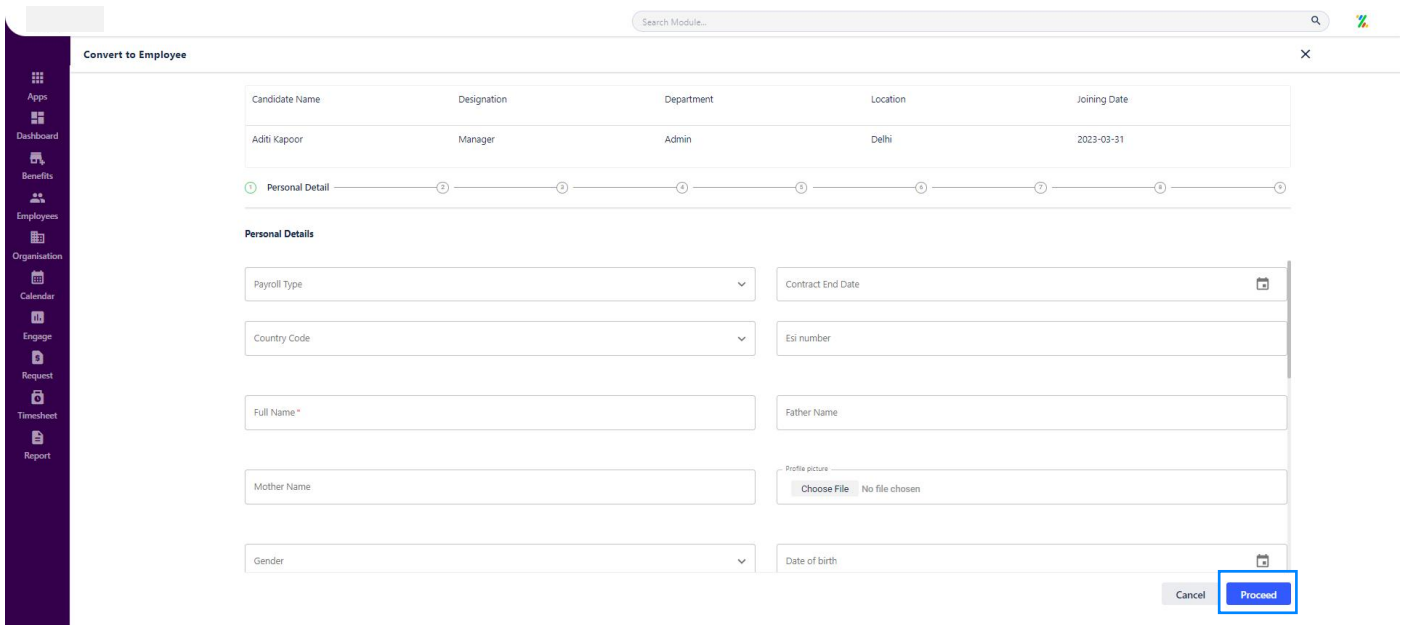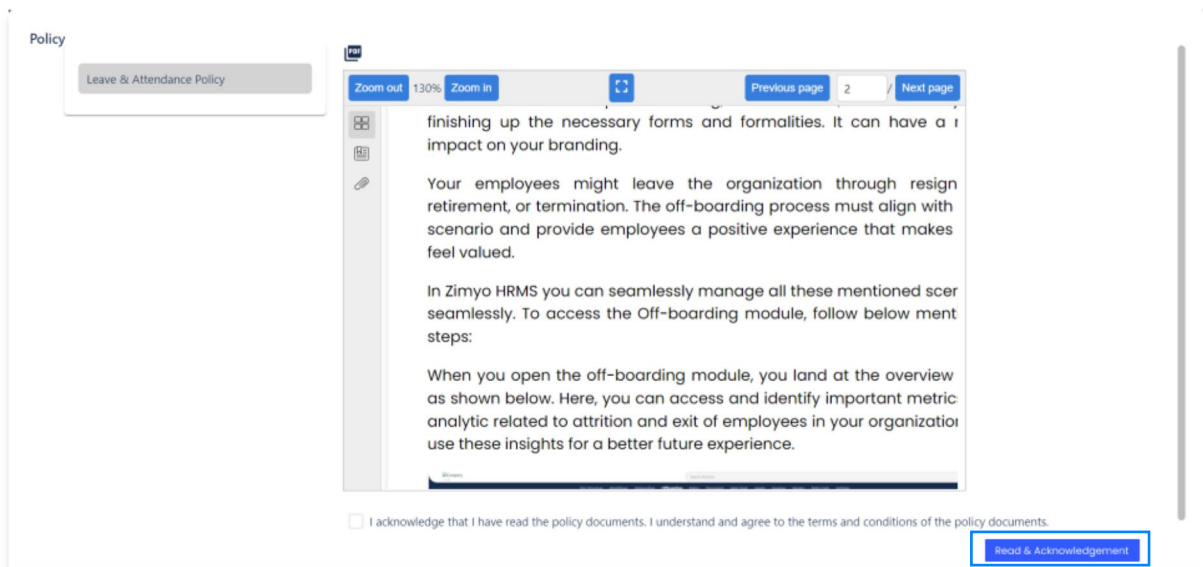

Employee Onboarding: Now the candidate become part of the organization, an employee needs to take further action as per the requirement.

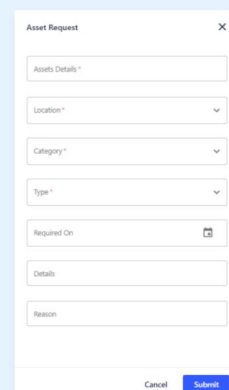**Employee Credential:** Share login details with employee to login on the portal.
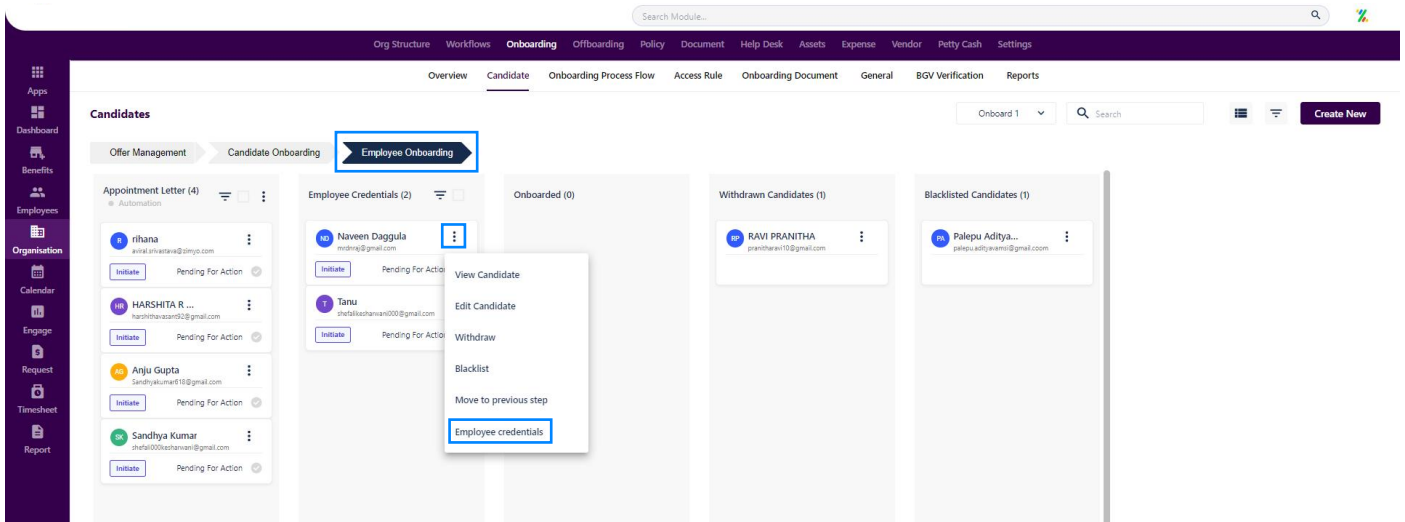
Onboarding Kit: Whenever an employee will login on the portal very first time, the system will ask for the acknowledgment on the company's policies.
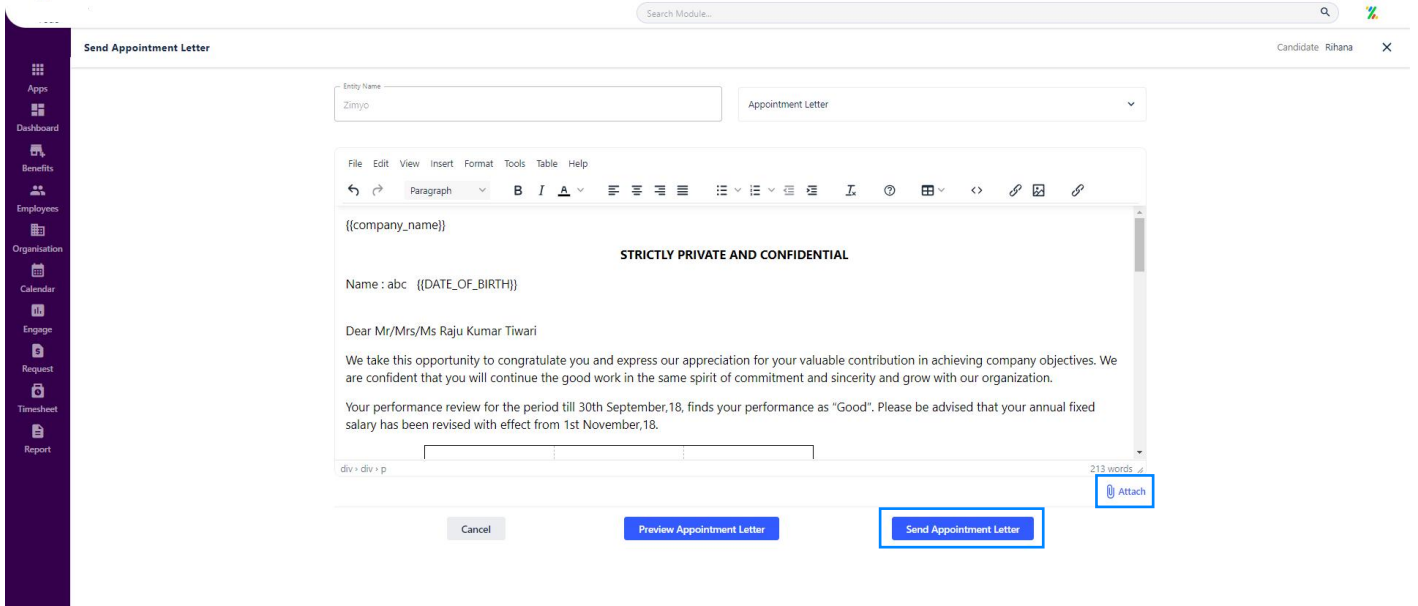

Request Asset: Required assets will be requested on behalf of the candidate.
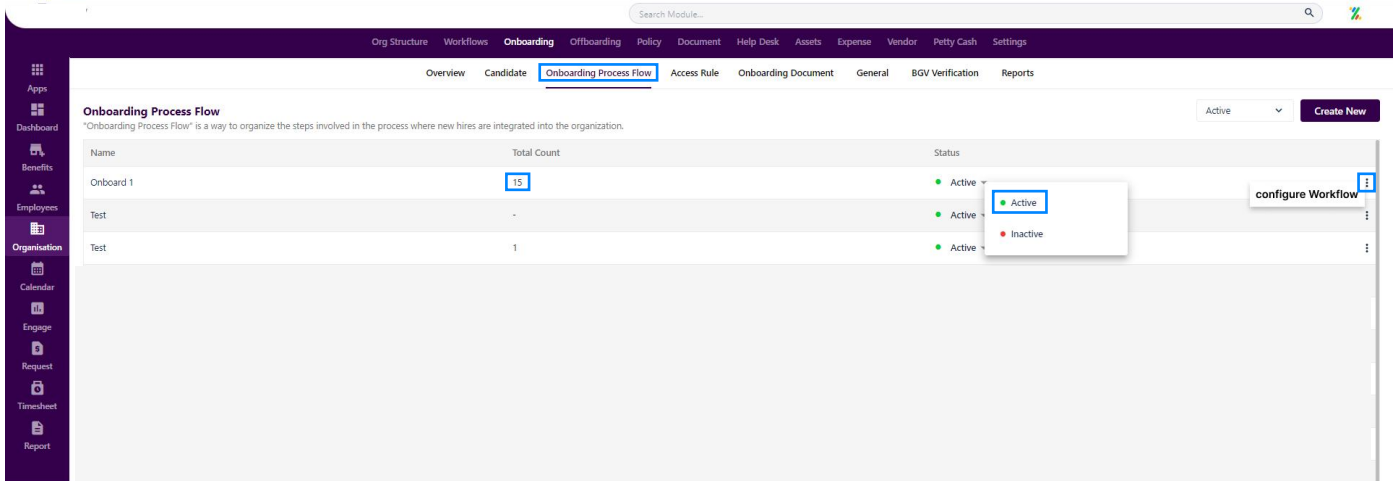
**"New Request"** allow user to a request asset.

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


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


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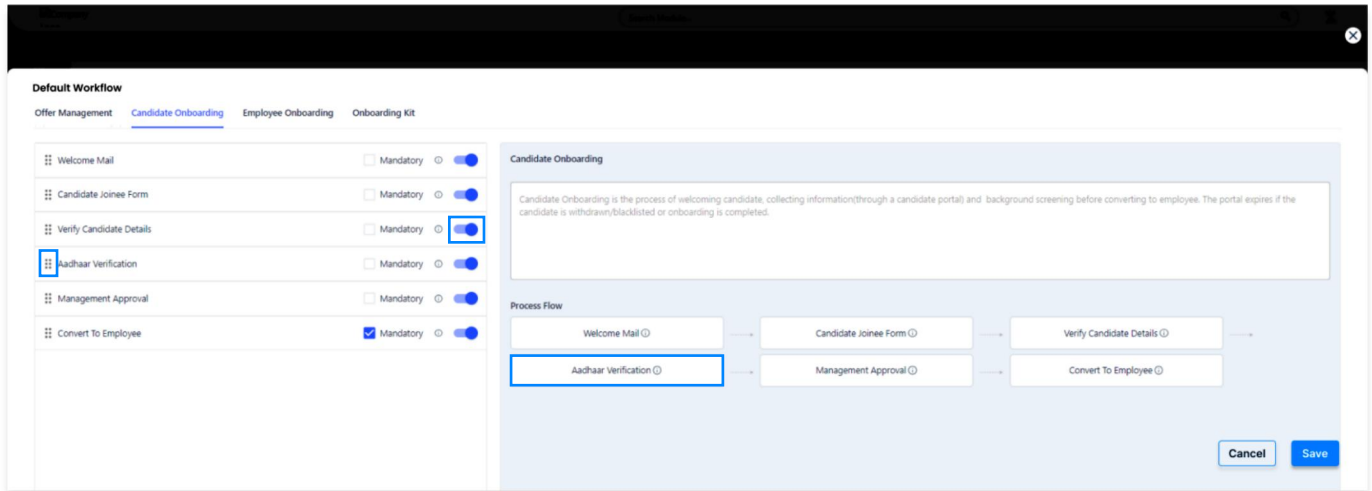
Access Rule: You can create a new access rule here and configure the existing ones. In any access rule, you can select the steps/actions that you want to include in the onboarding process and you can map the access rule with users in the Users section in next steps.
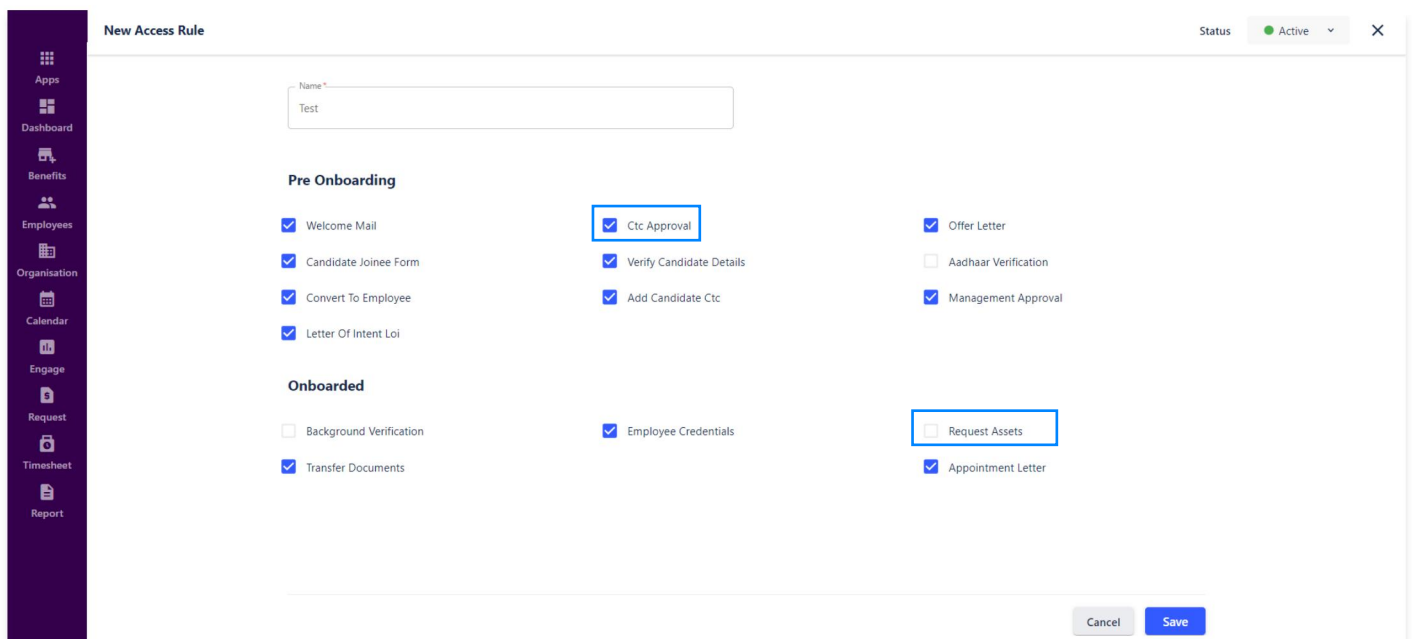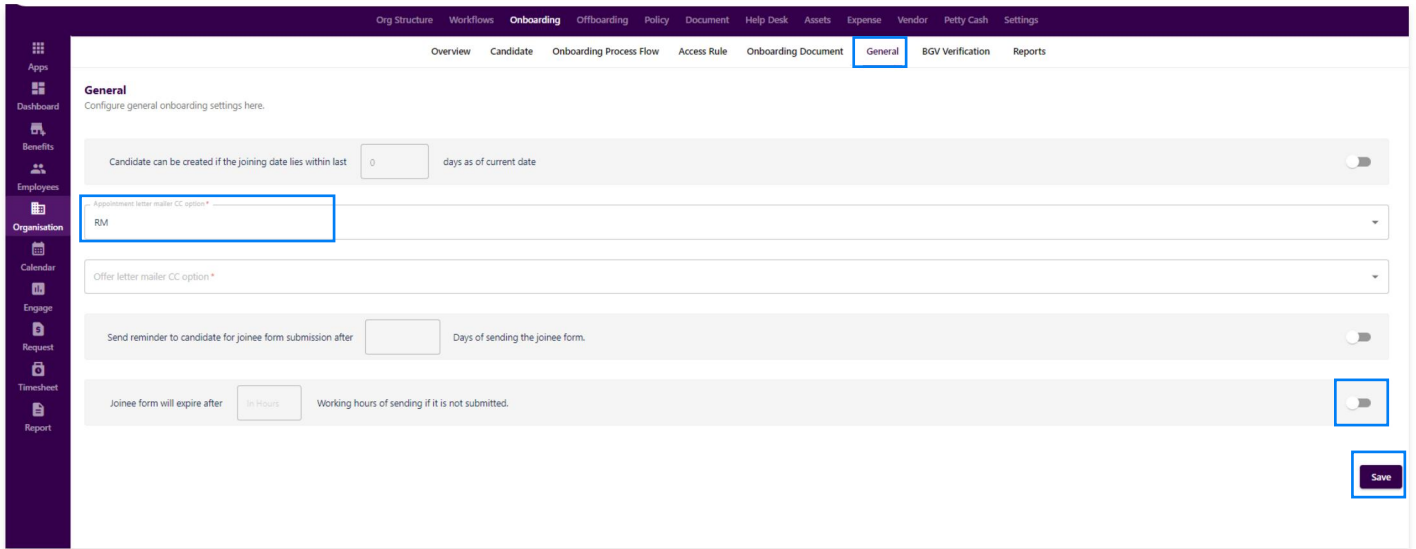

Documents: You can preview and edit document templates from here which will be required during the onboarding process. For eg. Offer Letter, Appointment Letter etc.
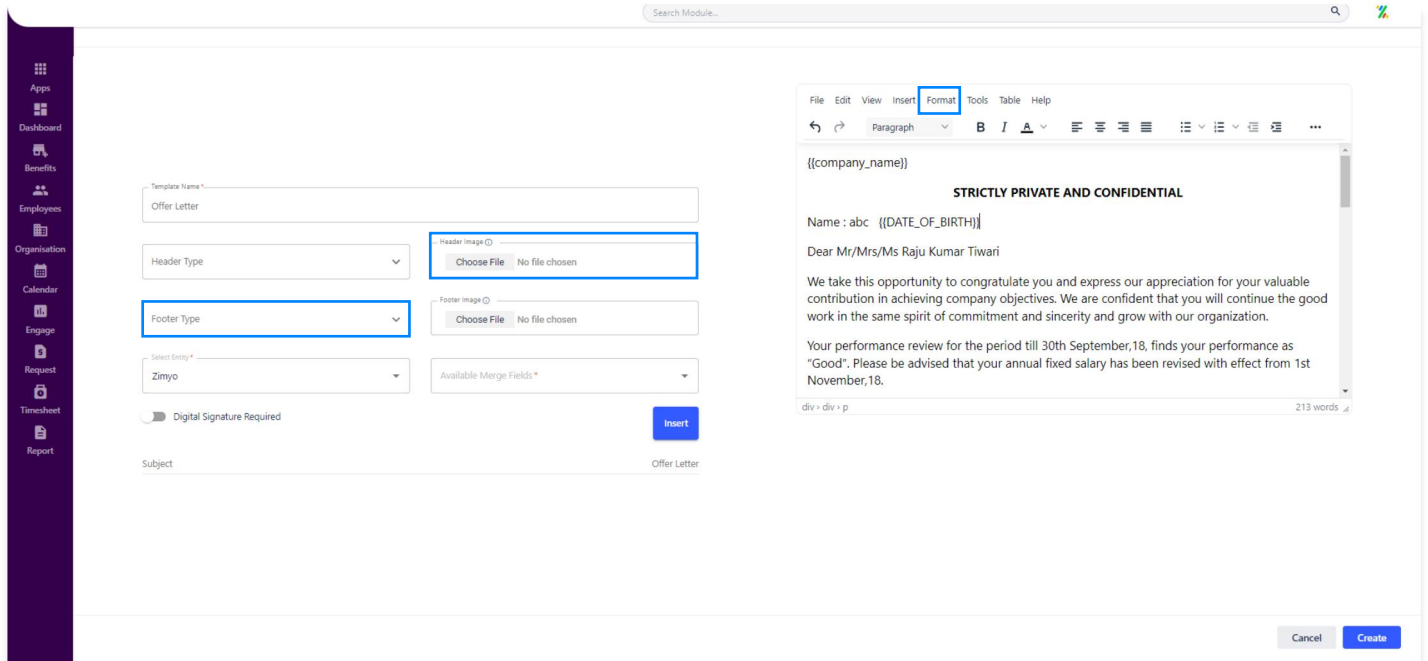
Users: Here, you can assign access rules created in above section to the sub admin users who'll have access to onboarding module. The users can only perform the steps you defined in the access rule.
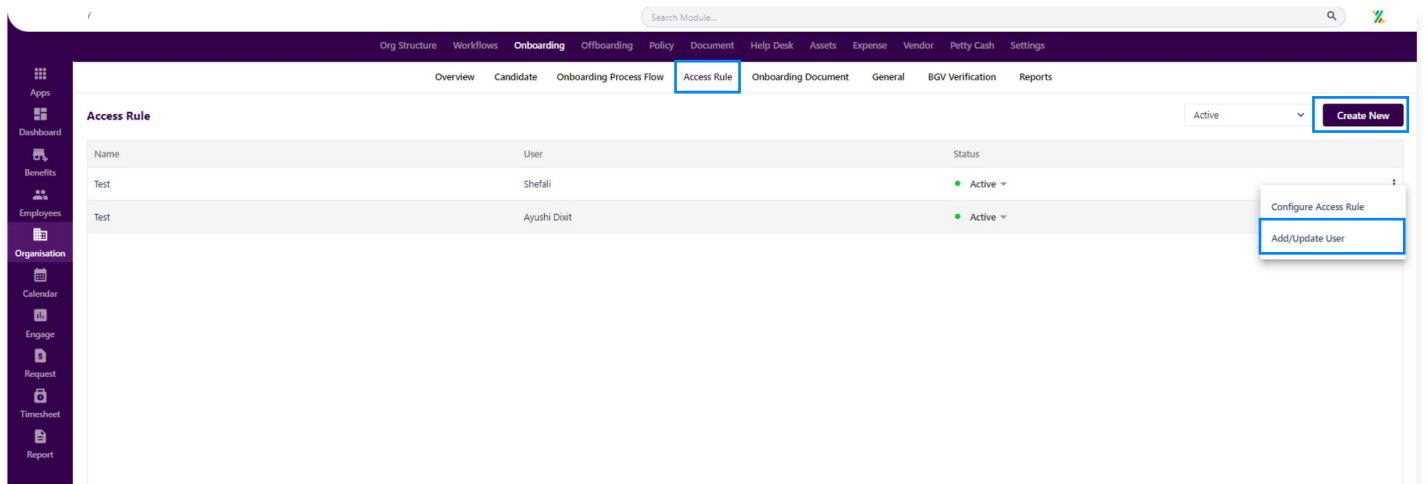
General: Here, you can configure few other settings, like, You can set joining days limit for candidates, sent CC mail to RM or custom for appointment letter & offer letter & reminder to candidates for Joining form.
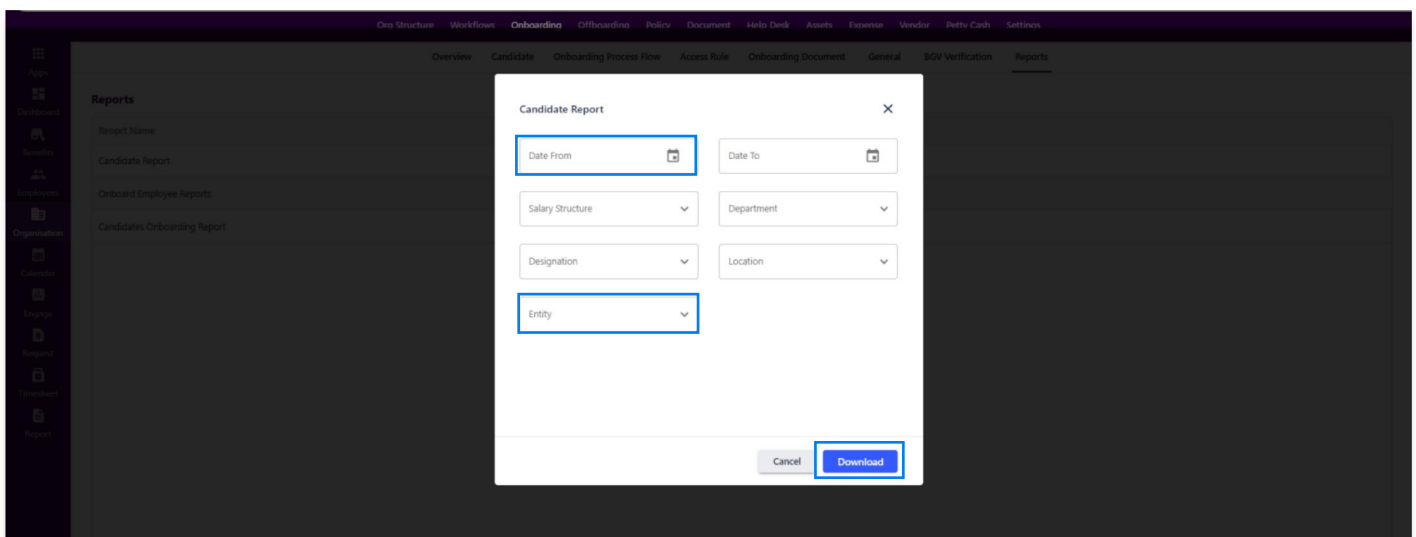
BGV Verification: You can search, view, update and download the background verification status and report from here. Background verification can include aadhar BGV, criminal BGV, education BGV or work BGV etc.

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