



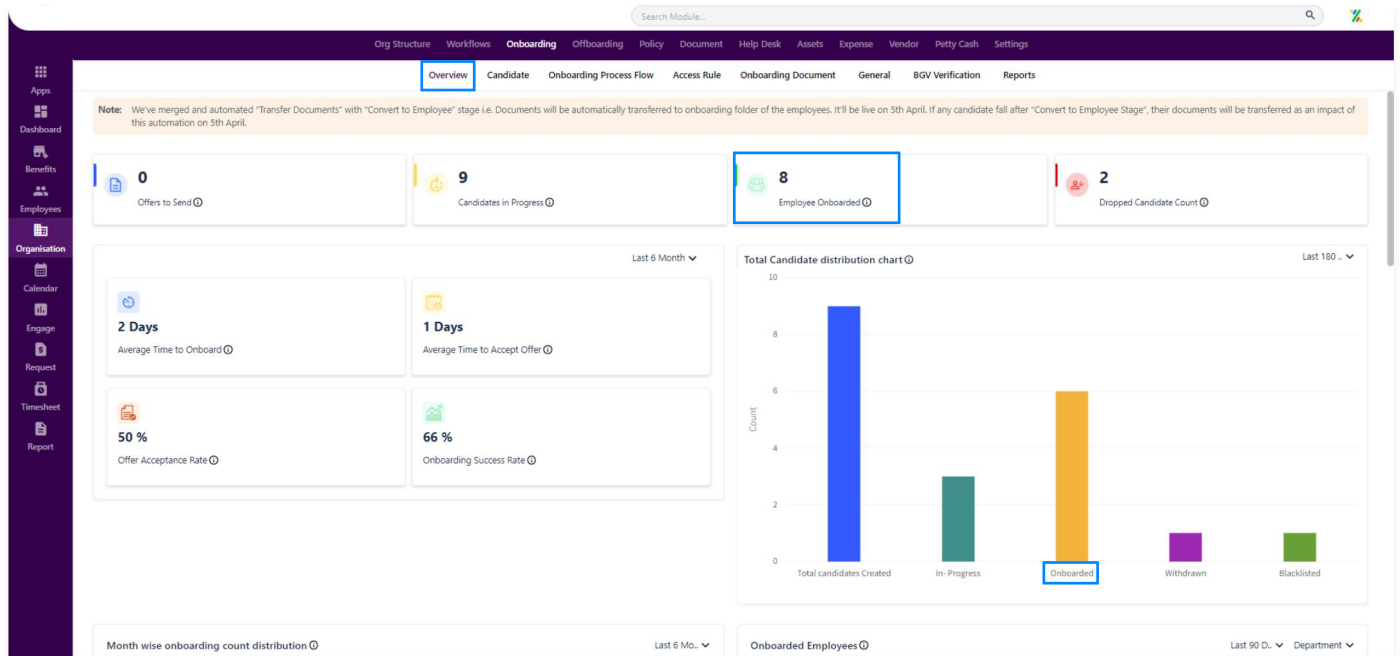
Employee Onboarding with Zimyo.



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Total Candidates: It shows the number of onboarded candidates, blacklisted candidates and the candidates withdrawn during the process.

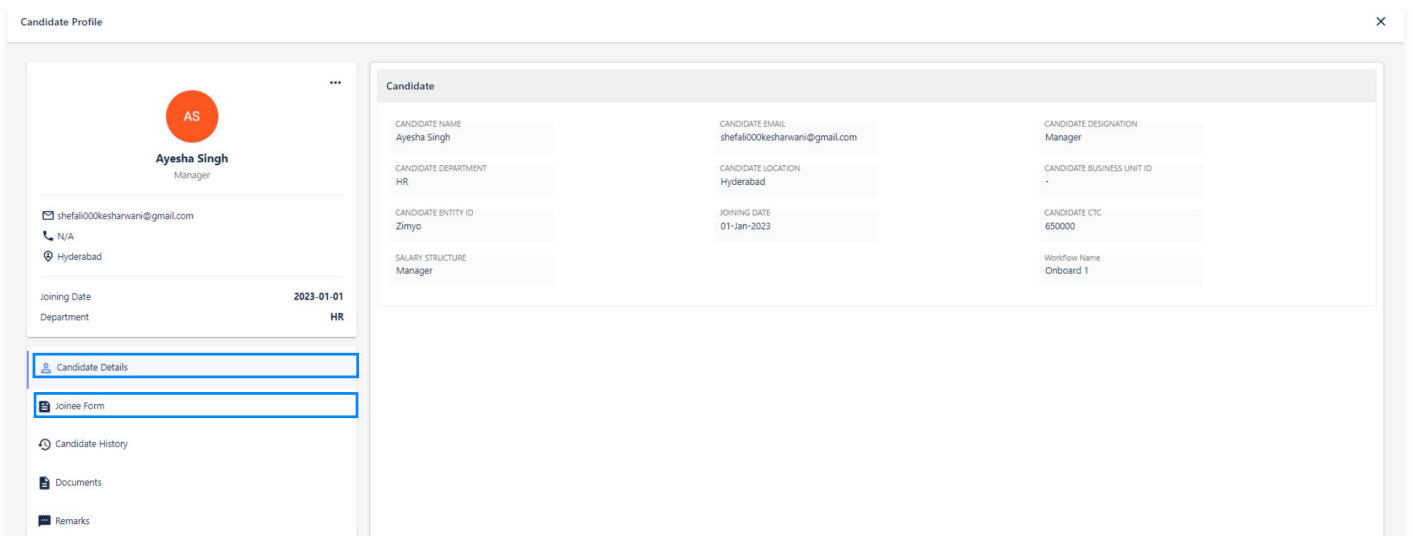
Candidates Stages: It shows the number of candidates at various onboarding stages which we are going to discuss further.

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.



Candidate Profile

Ayesha Singh
Manager

shefal000kesharwani@gmail.com
N/A
Hyderabad

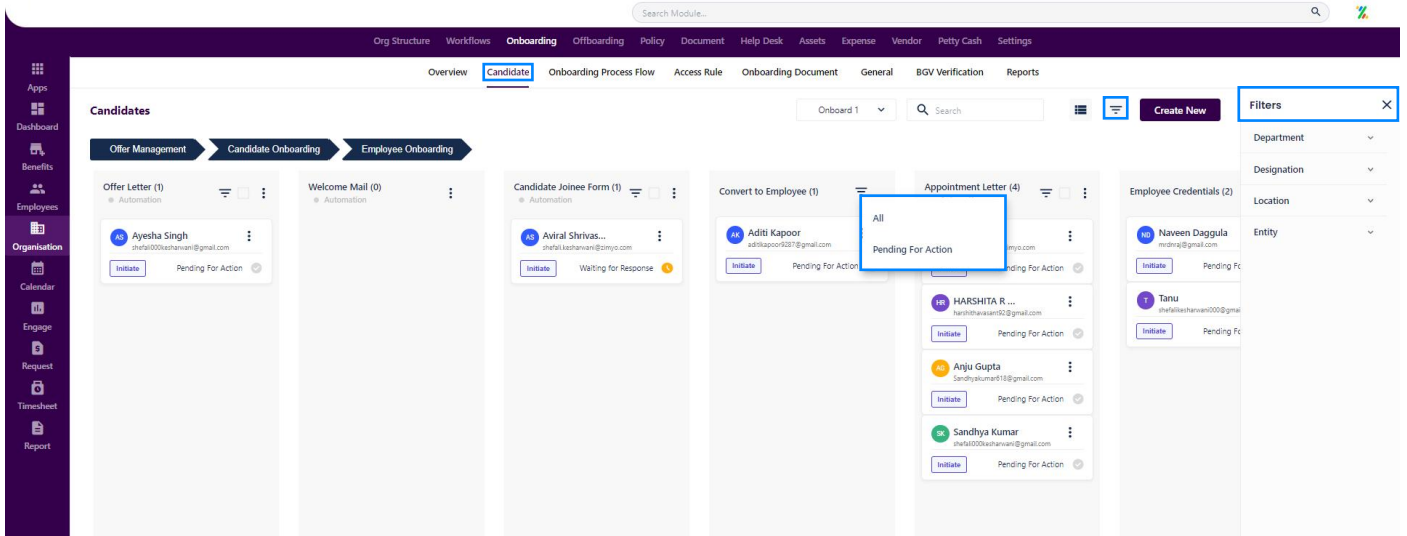
Joining Date: 2023-01-01
Department: HR

Candidate

CANDIDATE NAME Ayesha Singh	CANDIDATE EMAIL shefal000kesharwani@gmail.com	CANDIDATE DESIGNATION Manager
CANDIDATE DEPARTMENT HR	CANDIDATE LOCATION Hyderabad	CANDIDATE BUSINESS UNIT ID -
CANDIDATE ENTITY ID Zimyo	JOINING DATE 01-Jan-2023	CANDIDATE CTC 650000
SALARY STRUCTURE Manager		Workflow Name Onboard 1

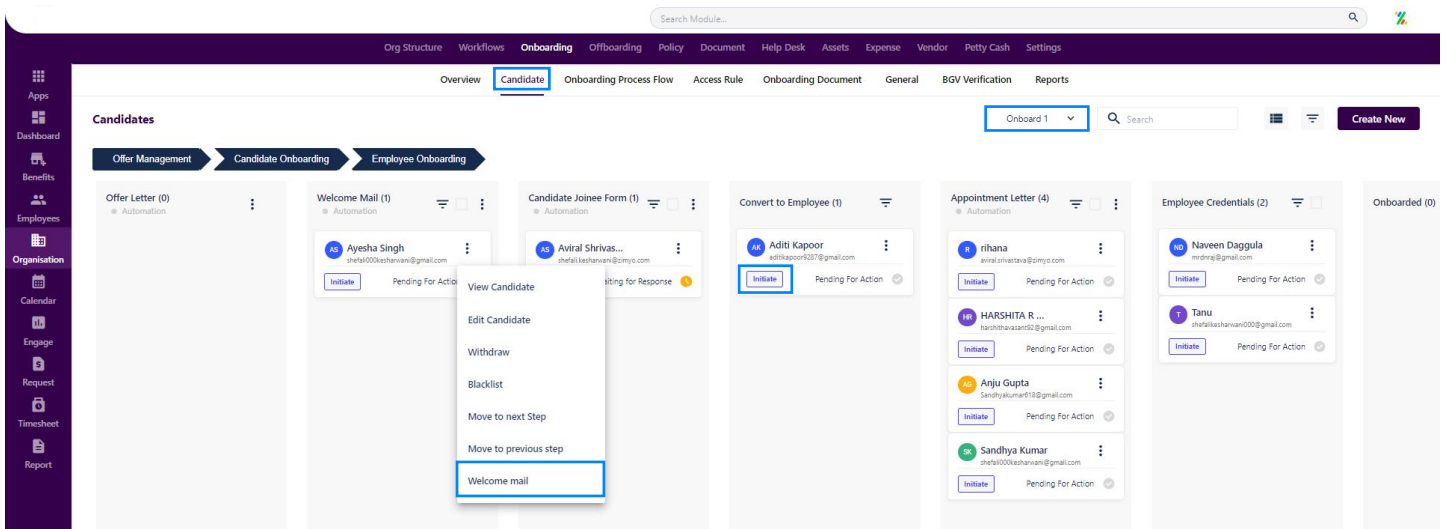
Navigation: Candidate Details, Joinee Form, Candidate History, Documents, Remarks

- ➔ 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: Gunjan bhola X

<input type="text" value="Employee CTC"/> 300000	<input type="text" value="Monthly CTC"/> 25000	<input type="text" value="Monthly Gross Salary"/> 25000
<input type="text" value="Salary Structure"/> General (without PT) v	<input type="text" value="Monthly Deduction"/>	<input type="text" value="Monthly Net Payable"/> 25000
<input type="text" value="Applicable From *"/> v	Earning	<input checked="" type="checkbox"/> Show on offer letter
<input type="text" value="Enforce ESIC"/> v	<input type="text" value="HRA"/> 0	<input type="text" value="BASIC"/> 0
<input type="text" value="Compute"/>	<input type="text" value="Other"/> 25000	<input checked="" type="checkbox"/> Show on offer letter
	Deduction	<input type="text" value="PF"/> 0
		<input type="text" value="Employee ESI"/> 0
		<input type="button" value="Cancel"/> <input type="button" value="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](#) ▾

CTC Details

Monthly CTC

Monthly Deduction

Monthly Gross Salary

Monthly Net Payable

Earning

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.

Offer letter Inbox x
9:14 AM (8 hours ago) ☆ ↶ ⋮

Zimyo Consulting Private Limited <noreply@zimyo.com>
to me ▾

Dear Leena Abbas,

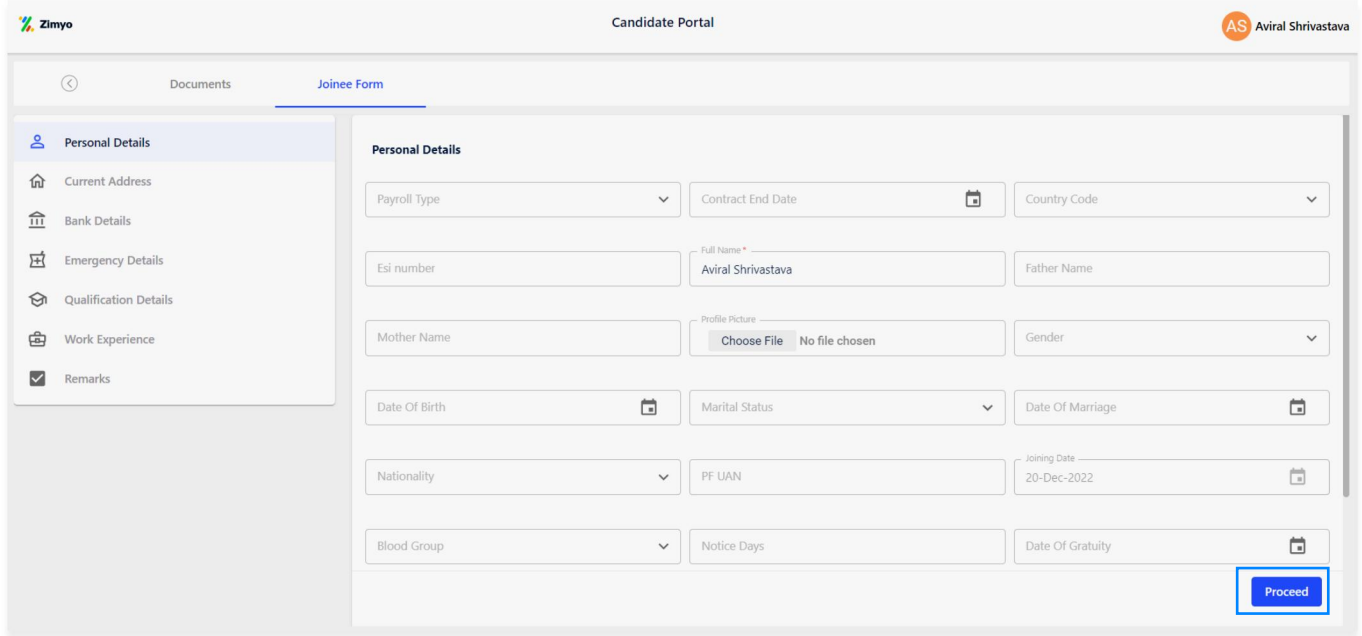
You were excellent during the interview process, and our hiring team is impressed with you. We believe that you have all the qualities required to take this position to new heights. For that reason, we would like to offer you the position of Intern at Zimyo Consulting Private Limited.

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

To accept or reject the offer, please click here

Zimyo Consulting Private Limited

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



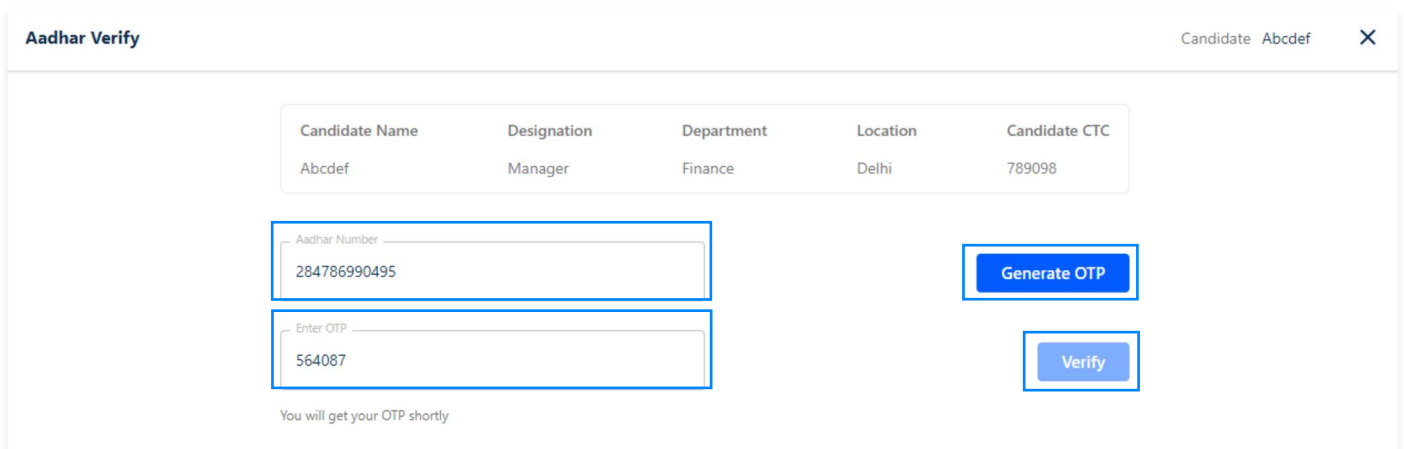
The screenshot shows the 'Candidate Portal' interface for a user named 'Aviral Shrivastava'. The 'Joinee Form' is displayed with a sidebar menu on the left containing options like Personal Details, Current Address, Bank Details, Emergency Details, Qualification Details, Work Experience, and Remarks. The main form area is titled 'Personal Details' and contains the following fields:

- Payroll Type (dropdown)
- Contract End Date (calendar icon)
- Country Code (dropdown)
- Esi number
- Full Name* (Aviral Shrivastava)
- Father Name
- Mother Name
- Profile Picture (Choose File, No file chosen)
- Gender (dropdown)
- Date Of Birth (calendar icon)
- Marital Status (dropdown)
- Date Of Marriage (calendar icon)
- Nationality (dropdown)
- PF UAN
- Joining Date (20-Dec-2022, calendar icon)
- Blood Group (dropdown)
- Notice Days
- Date Of Gratuity (calendar icon)

A 'Proceed' button is located at the bottom right of the form.

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.



The screenshot shows the 'Aadhar Verify' form for a candidate named 'Abcdef'. The form includes a table with candidate details and input fields for Aadhar Number and OTP.

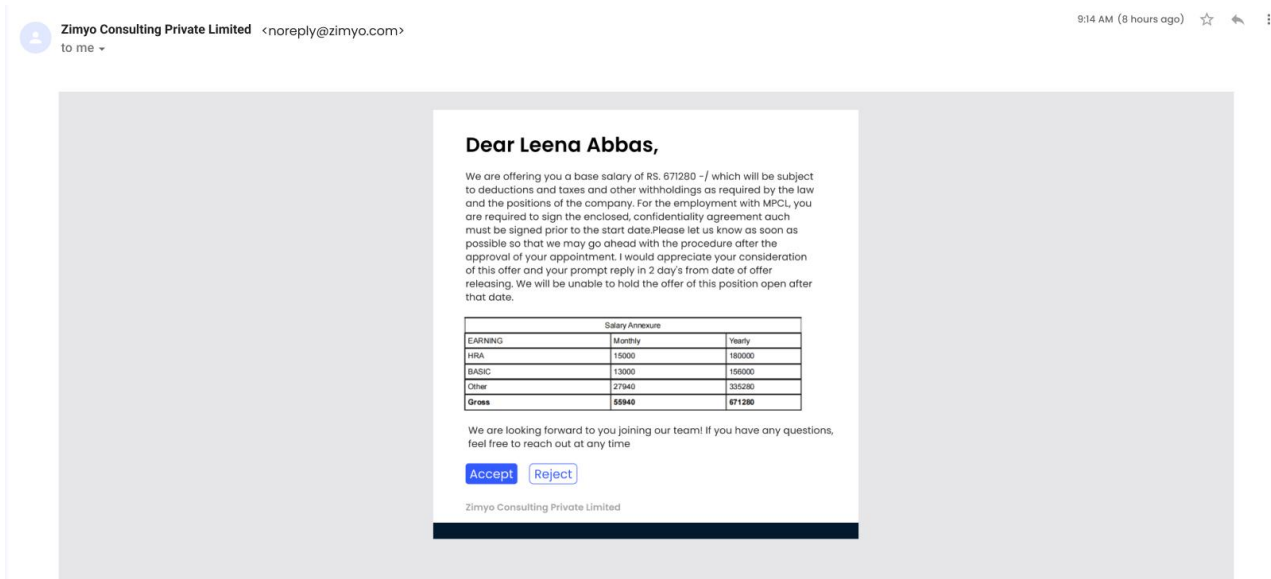
Candidate Name	Designation	Department	Location	Candidate CTC
Abcdef	Manager	Finance	Delhi	789098

Below the table, there are two input fields:

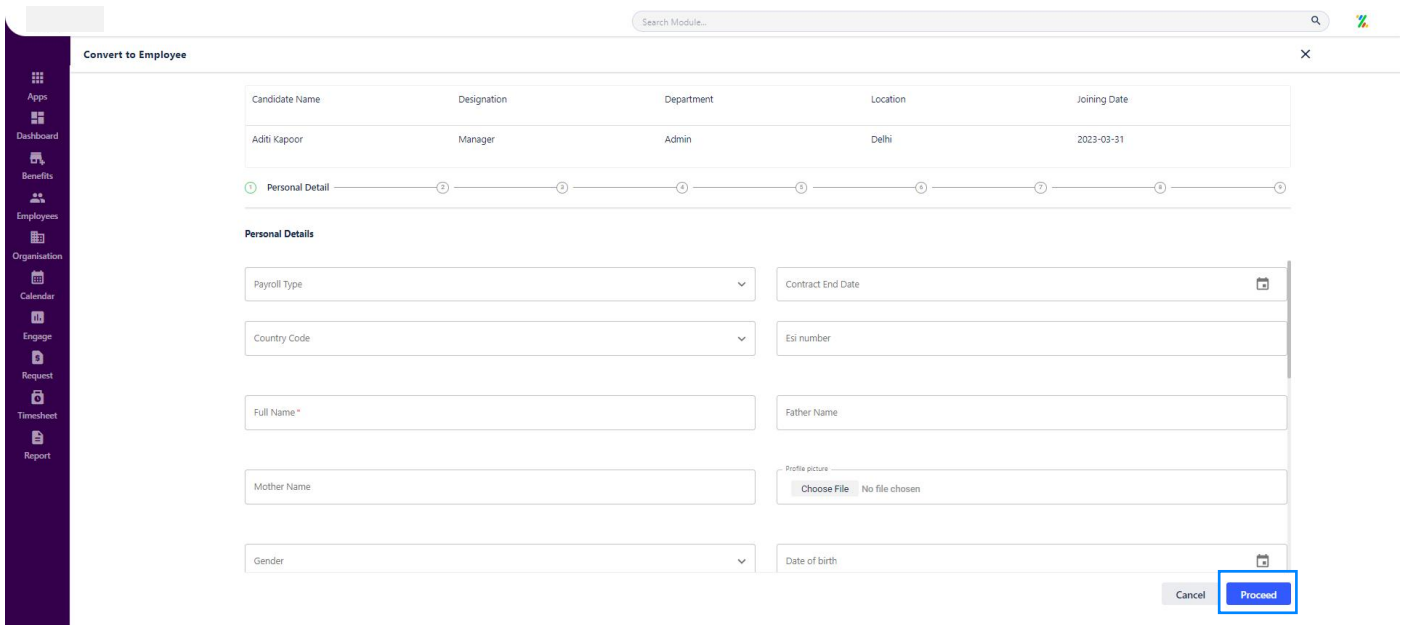
- Aadhar Number: 284786990495
- Enter OTP: 564087

Buttons for 'Generate OTP' and 'Verify' are present. A message at the bottom states: 'You will get your OTP shortly'.

Acknowledgement: A Candidate can submit acknowledgment via the mail.

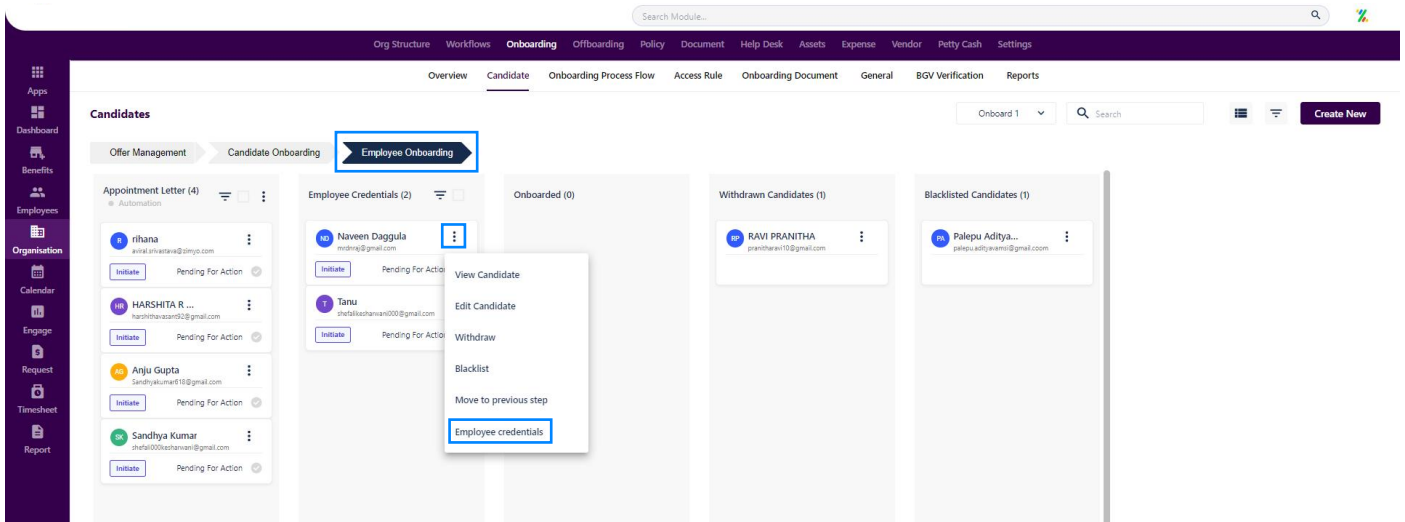


Convert to Employee: At the last stage of the Candidate onboarding process, click here to convert the candidate to Employee.

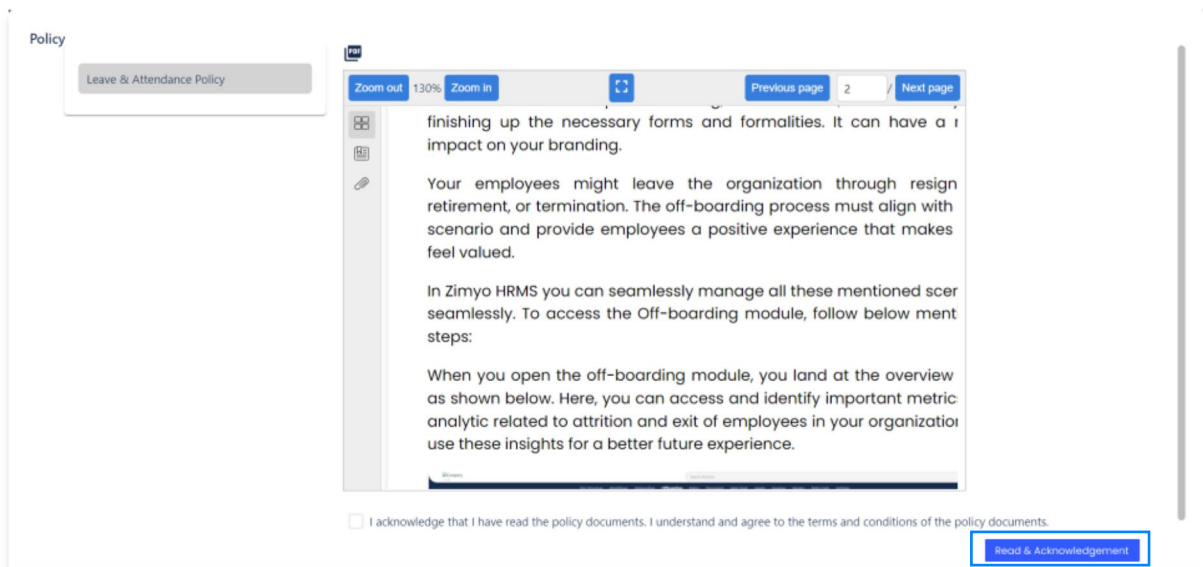


Employee Onboarding: Now the candidate become part of the organization, an employee needs to take further action as per the requirement.

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

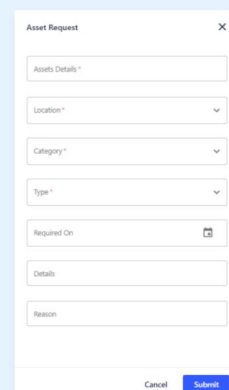


Onboarding Kit: Whenever an employee will login on the portal very first time, the system will ask for the acknowledgment on the company's policies.

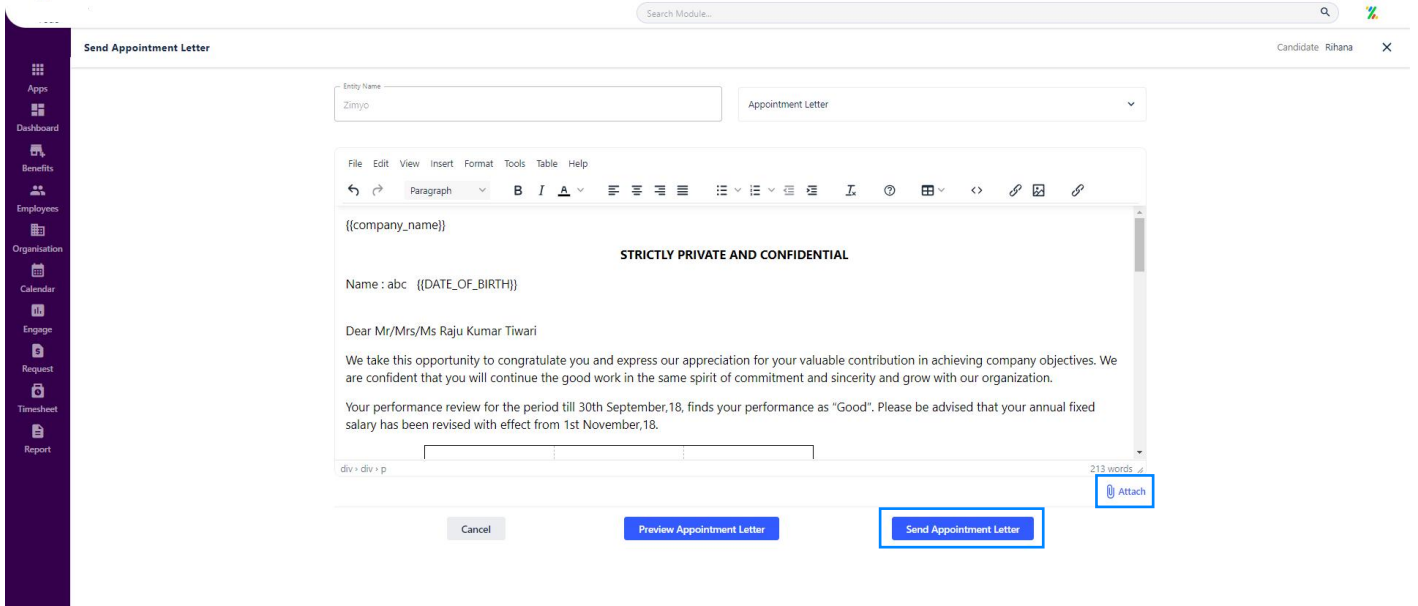


Request Asset: Required assets will be requested on behalf of the candidate.

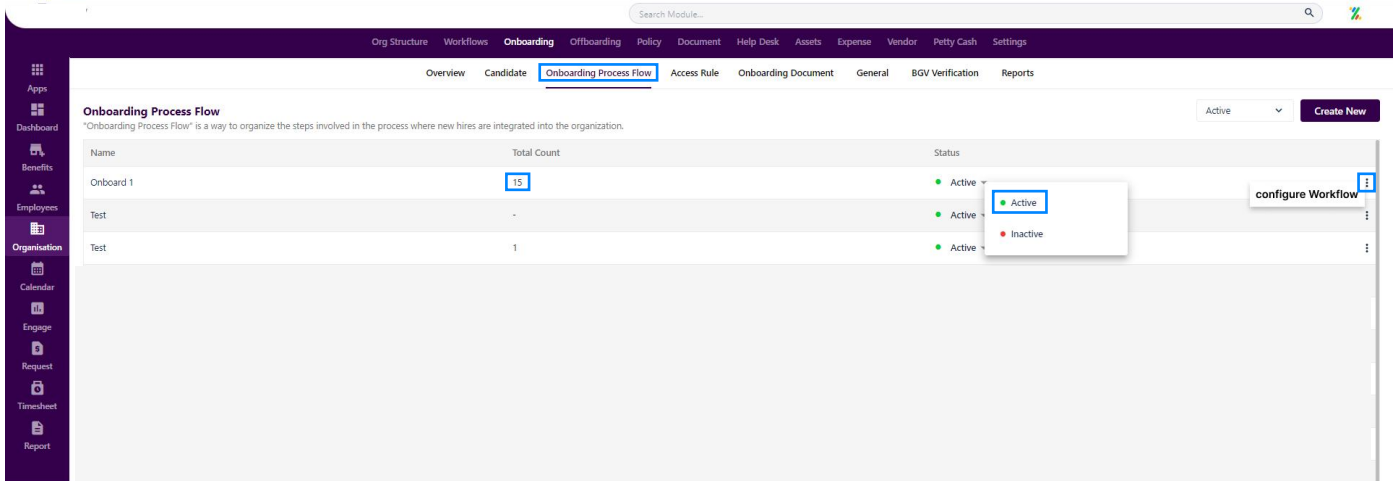
"New Request" allow user to a request asset.



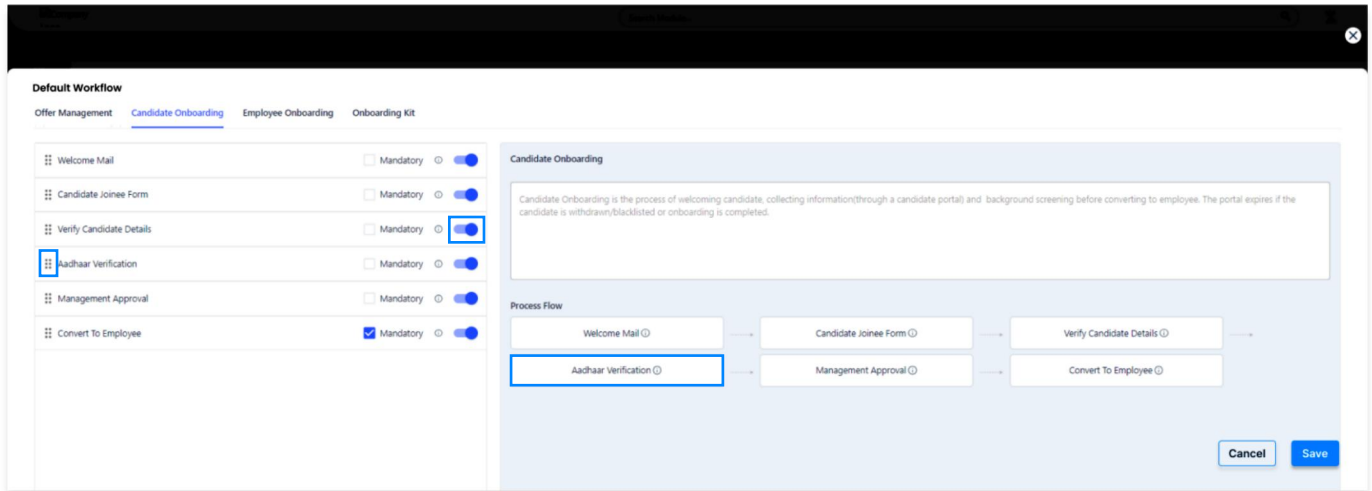
Send Appointment Letter: Appointment letter will be sent to the candidate if offer letter is accepted.



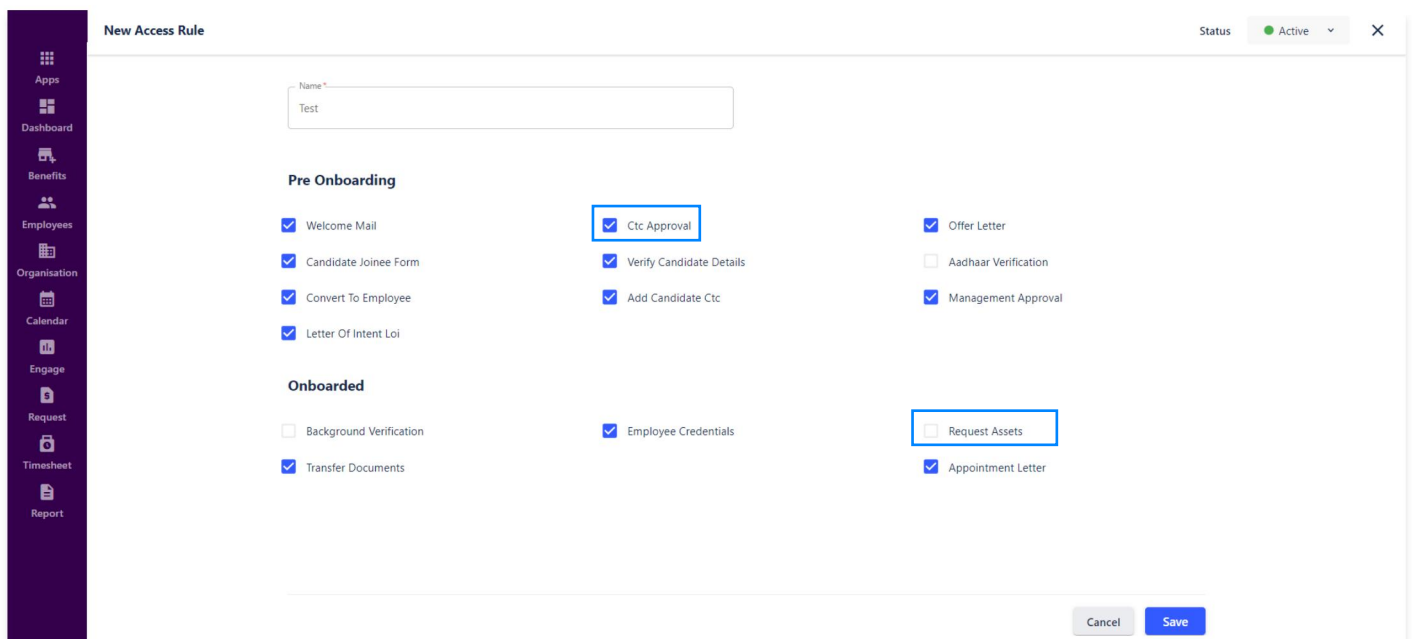
Onboarding Workflow: You can create new onboarding workflows by clicking at the "Create New" button.



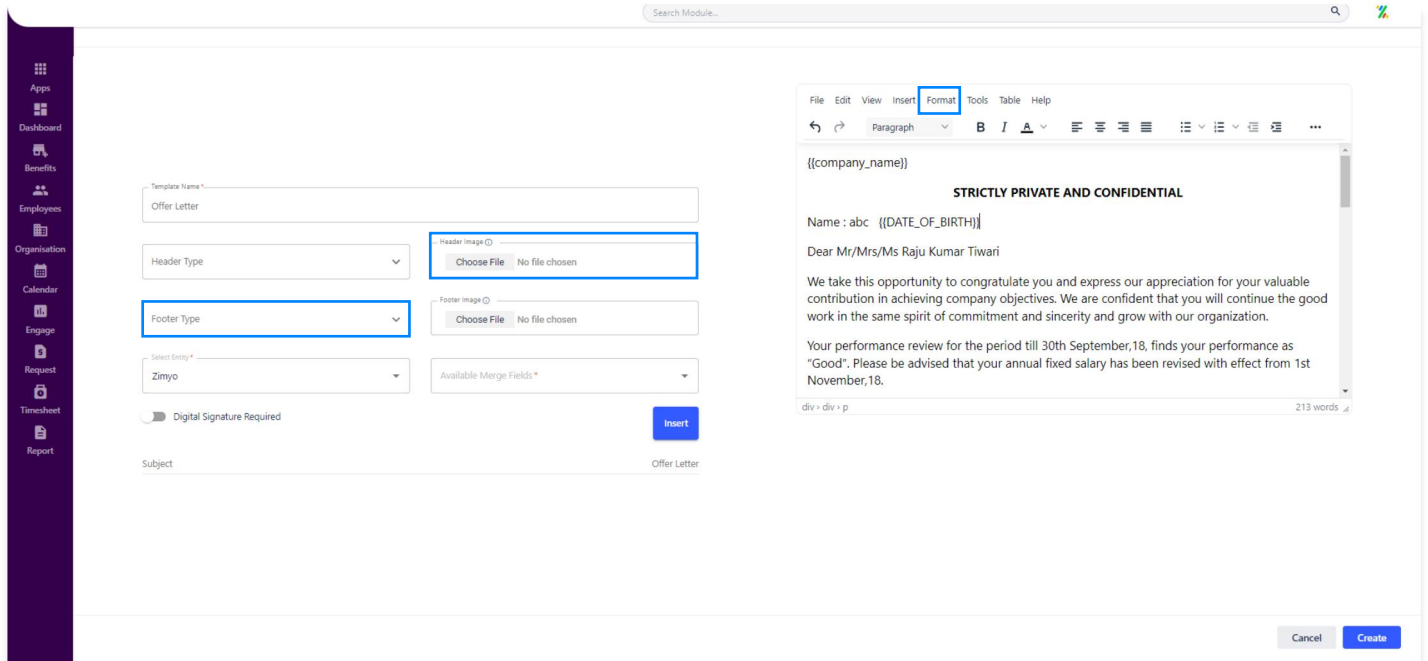
You can configure the workflows by clicking at the 3 dots, a new pop-up will appear as shown below where you can add, prioritise the properties as per your organization needs. You can change the status as active or inactive from the drop down at the top right corner. You can also create an onboarding 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.



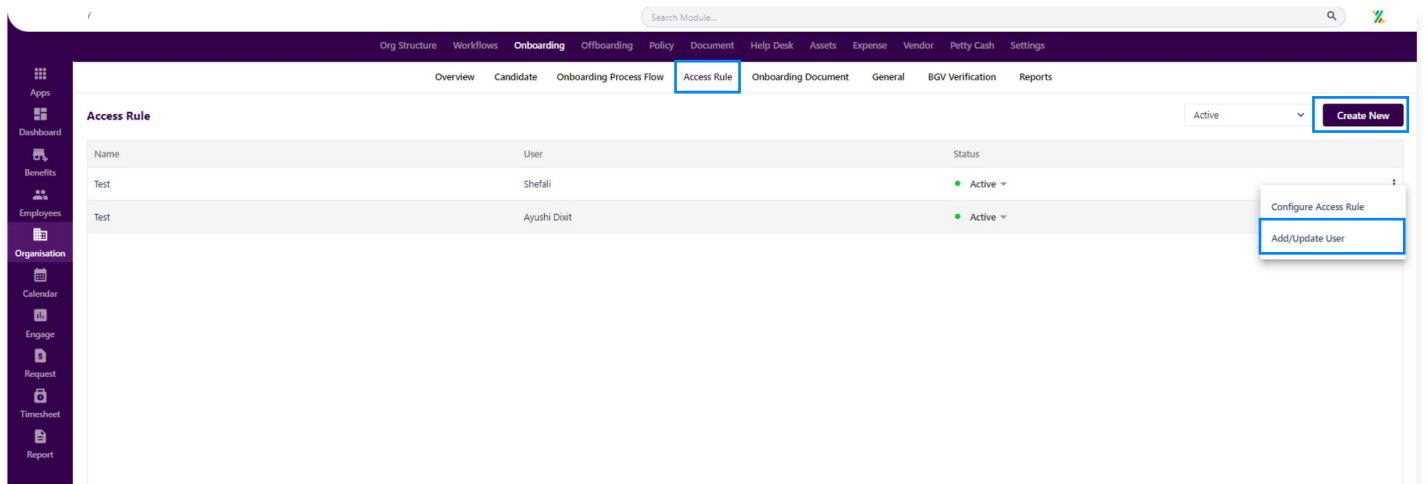
Access Rule: You can create a new access rule here and configure the existing ones. In any access rule, you can select the steps/actions that you want to include in the onboarding process and you can map the access rule with users in the Users section in next steps.



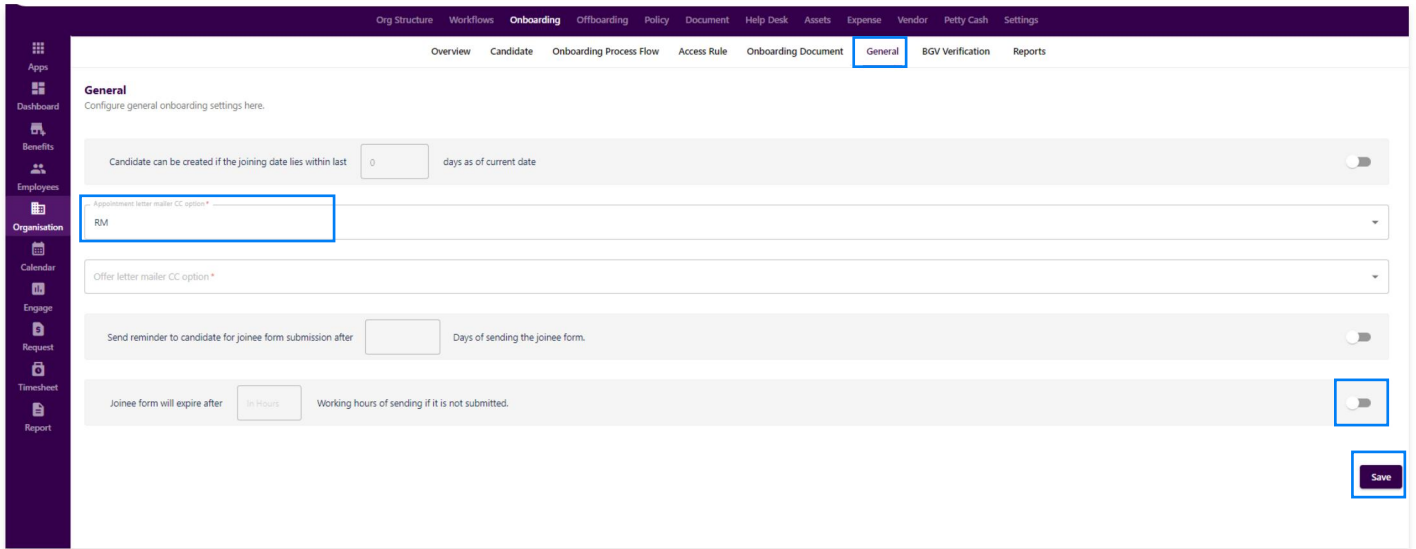
Documents: You can preview and edit document templates from here which will be required during the onboarding process. For eg. Offer Letter, Appointment Letter etc.



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.



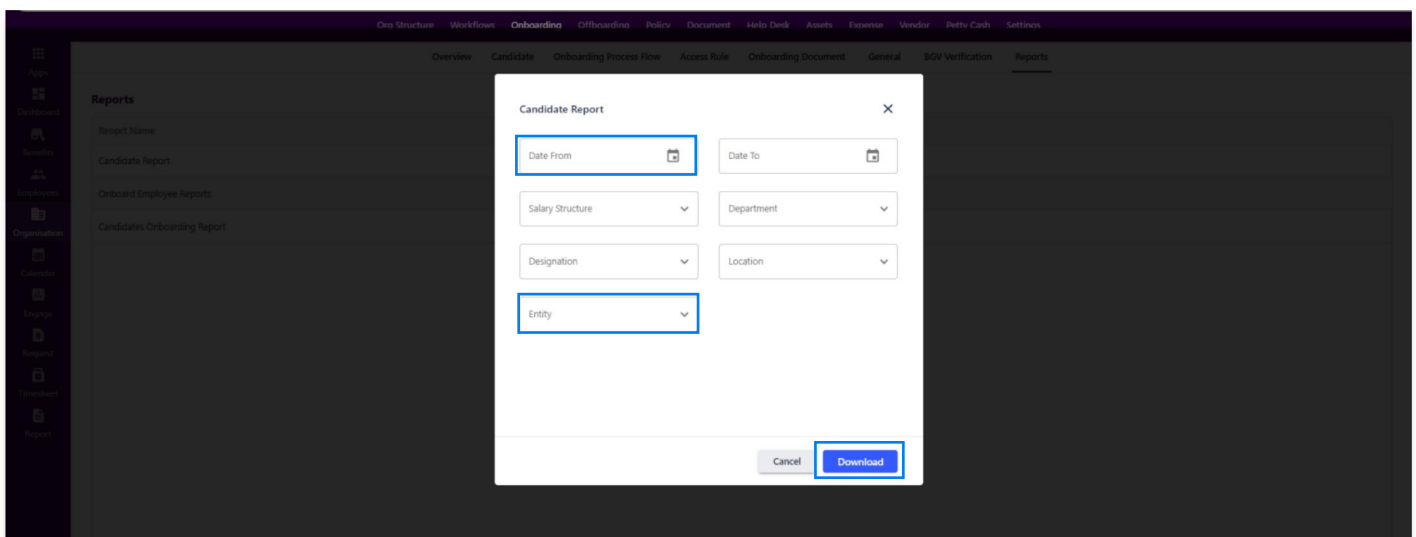
The screenshot shows the 'General' settings page for Onboarding. The page has a purple header with navigation tabs: Overview, Candidate, Onboarding Process Flow, Access Rule, Onboarding Document, General (selected), BGV Verification, and Reports. A left sidebar contains icons for Apps, Dashboard, Benefits, Employees, Organisation, Calendar, Engage, Request, Timesheet, and Report. The main content area is titled 'General' and contains several settings:

- 'Candidate can be created if the joining date lies within last' with a text input '0' and 'days as of current date'.
- 'Appointment letter mailer CC option*' with a dropdown menu showing 'RM'.
- 'Offer letter mailer CC option*' with a dropdown menu.
- 'Send reminder to candidate for joiner form submission after' with a text input and 'Days of sending the joiner form.' and a toggle switch.
- 'Joiner form will expire after' with a text input 'In Hours' and 'Working hours of sending if it is not submitted.' and a toggle switch.

A 'Save' button is located at the bottom right of the 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.



The screenshot shows the 'Reports' page in the Zimyo system. The left sidebar has a 'Reports' section with sub-items: Report Name, Candidate Report, Onboard Employee Reports, and Candidate Onboarding Report. A 'Candidate Report' modal is open in the center, with the following fields:

- 'Date From' and 'Date To' (calendar pickers)
- 'Salary Structure' and 'Department' (dropdown menus)
- 'Designation' and 'Location' (dropdown menus)
- 'Entity' (dropdown menu)

At the bottom of the modal are 'Cancel' and 'Download' buttons.