PROCESS AUTOMATION

Employee Probation

About this automation:

Use this process to send a reminder task and create documents required for employee probation period review.



Simply import the sample automation, customise to suit your practice, test and activate!

Performance & Development Program

Position:	«FYI_custom_Employee_Role»	
Manager:	«Manager»	
Review date:	To be scheduled shortly	

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2. What do you think you do well Employee Comments:

3. What areas do you think you could improve?

Reflect on tasks/proje

What's included:

 Probation performance Review Document & Email Templates
 Automation Process Steps

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			3	FYI Actions		Created e The document w Notes	mail will be immediately ser fill be filed as "PYI: Your first 6	t Months" in the Employees cabine	
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How to import:

Before you begin - ensure your **Employee View** has been saved.

• Employee Status = Active

Ac	ctivity Reports Time Invoices Employee	5			
	Active Employees	Search employees ×			51
	Name	Email	Partner	Manager	Active 👻
ľ	Carl Davies	carl.davies@thegrowth.partners	Olivia Williams		0
	Cathy Woods	cathy woods@thegrowth.partners	Harry Spins	Liz Hurst	0
	Crystal Rich	crystal.rich@thegrowth.partners	Crystal Rich		0

Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

Step 2 - Import the files into FYI

Navigate to the Automations screen and click the Import button on the right-hand side of the screen.

Locate and select your saved "Employee Probation Period" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view.

The Process and Templates will be imported into FYI.

Step 3 - Review the process

Review the Templates

Locate the templates in **Knowledge - Templates**. The templates will import with the prefix FYI making them easy to locate.

- Review and personalise the imported templates
- Update the template **Status** to Active.

Edit and Review Each Process Step

The Custom Process is imported with the **Status** set to Draft. You can locate the process by searching in the "Search processes" field.

- Review the schedule and owner
- Review and update each **process step.** Specific comments have been added to the steps where action is required. These will display in **blue**.

Step 4 - Test and run the automation

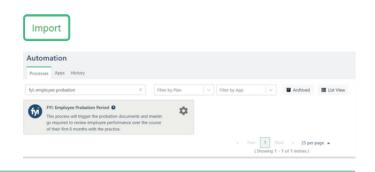
Click the Test button to display a list of Employees.

From Select Test Employee, search and select a specific employee to run the test for and select Run Test. A Test Employee is handy for testing scheduled automations.

Review the test by clicking the View History link, or from the Employee workspace.

When ready, set the **Status** to Active. The process will run automatically according to the schedule.

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		FYI: Probation Passed	FYI: Probation Passed C	Cathy Woods	09 Feb 2024 15:30	Active
		FYI: Performance and	FYI: Performance and D	Cathy Woods	09 Feb 2024 15:26	Active
		FYI: Your first 6 Months	FVI: Your first 6 Months	Cathy Woods	09 Feb 2024 15:21	Active
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Select Test Employee				
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Employee				
Aaron Test				
Amanda Bailey				
Anna Jordan				