

Employee Onboarding Process Automation

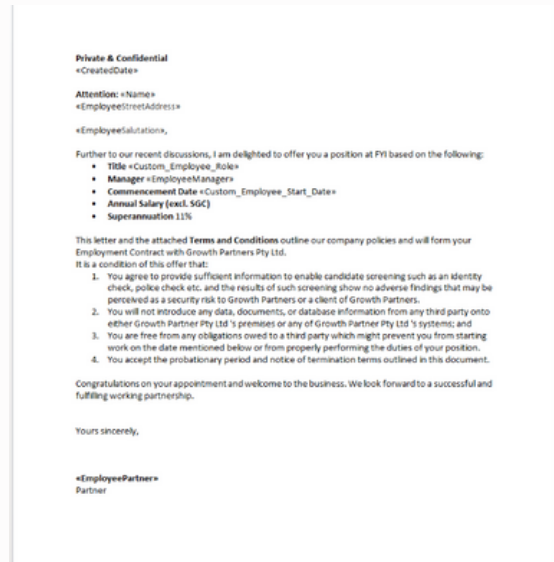


About this automation:

Use this process to create tasks and documents required for onboarding a new employee.



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

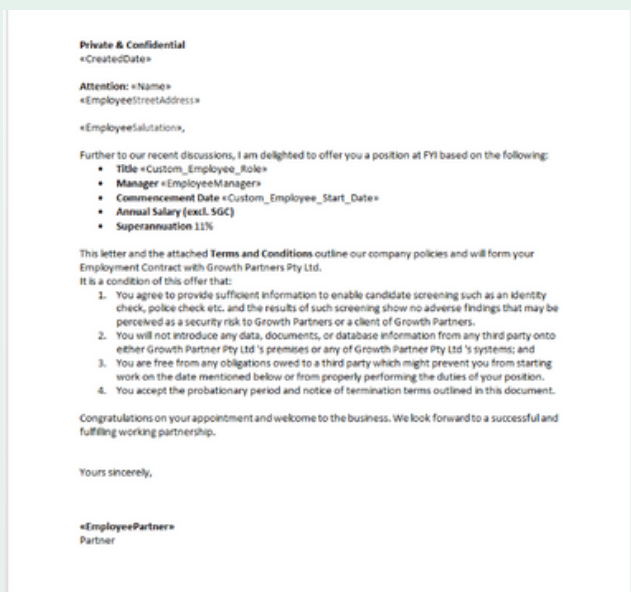


What's included:

- ✔ Letter of Offer, Induction Plan Documents & Email Templates
- ✔ Automation Process Steps

FYI: Onboard a New Employee

Start a new employee's journey on the front foot - auto-create documents, emails and internal tasks for a smooth transition.



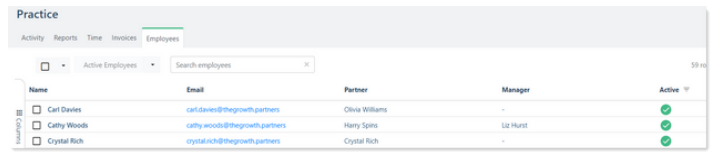
Type	Template Name	Name	Modified by	Modif...	Status
<input type="checkbox"/>	FYI: Employee Induction Plan	FYI: Employee L...	Cathy Woods	09 Feb 2024 1...	Active
<input type="checkbox"/>	FYI: Growth Partners Offer, Terms & Conditions	FYI: Growth Par...	Cathy Woods	09 Feb 2024 1...	Active
<input type="checkbox"/>	FYI: Onboarding Next Steps	FYI: Onboardin...	Cathy Woods	08 Feb 2024 1...	Active
<input type="checkbox"/>	FYI: Your first day...	FYI: Your first d...	Cathy Woods	08 Feb 2024 1...	Active
<input type="checkbox"/>	FYI: Welcome to Growth Partners!	FYI: Welcome L...	Cathy Woods	08 Feb 2024 1...	Active

Step	Application	Action
#1	FYI Actions	Create Task <ul style="list-style-type: none"> A task will be created with the subject "Add Employee into System" <p><i>Notes</i> Consider updating the assignee to the appropriate User or User Role</p>
#2	FYI Actions	Create Email <ul style="list-style-type: none"> An Email will be created from the "FYI: Welcome to Growth Partners!" template <ul style="list-style-type: none"> Created email will be immediately sent The document will be filed as "FYI: Welcome to Growth Partners!" in the Employees cabinet A task will be created with the subject "Update Employee Details (when response received)" <p><i>Notes</i> Consider updating the sender of the email and task assignee to the appropriate User or User Role</p>
#3	FYI Actions	Update Employee <ul style="list-style-type: none"> Employee Start Date will be updated Probation Period End Date will be updated
#4	FYI Actions	Create Word <ul style="list-style-type: none"> A Word document will be created from the "FYI Offer Terms and Conditions" template The document will be filed as "FYI Offer Terms and Conditions" in the Employees cabinet A task will be created with the subject "Review Contract for Sending" <p><i>Notes</i> Consider updating the task assignee to the appropriate User or User Role</p>

How to import:

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

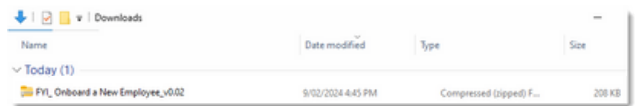
- Employee Status = Active



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.



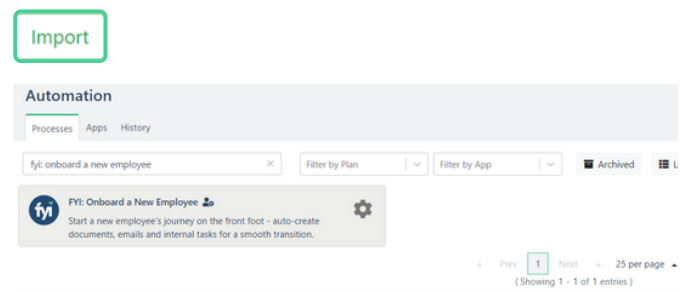
Step 2 - Import the files into FYI

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

Locate and select your saved "Onboard a New Employee" 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

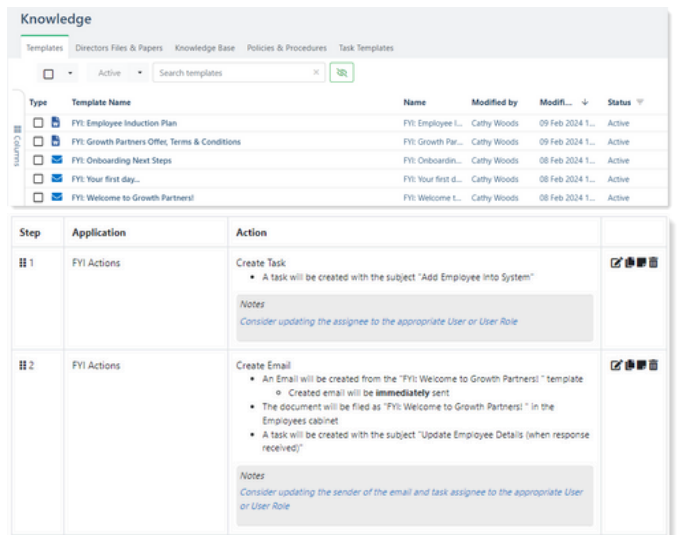
Locate the templates in Knowledge - Templates. The templates will import with the prefix FYI making them easy to locate.

- 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.

