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Onboarding Process

The entry of new employees into a company is usually time-consuming entailing a lot of manual work and it is necessary to coordinate many people in the different stages of the process. For this reason, delays often occur in the starting date or in the allocation of a workstation.

Bizagi offers a new template called the Onboarding Process to assist companies in this process. Onboarding focuses on how to integrate new employees into the organization, prepare them to execute their functions properly and to quickly become productive members of the organization.

In Bizagi Process Central you can find a complementary process to Onboarding called Recruitment and Selection. If you have downloaded Recruitment and Selection, you will find that Onboarding is launched as soon as the Recruitment is finished.
If you don’t have Recruitment and Selection, the Onboarding process will be available to run separately. That is, they are complementary processes but it is not necessary to have both.

The process begins when a new employee has been recruited and is entering the company.

A gateway evaluates if the Onboarding process has been started on its own, or if it has been launched from the Recruitment and Selection process.

If the process started by itself, the next activity to be performed is New Employee Information, where the Name, Last Name, email and the position that he or she is going to fill are entered.

The process opens two paths. The first path includes activities related to the legal documents that need to be signed by the new employee. The second path is about the required elements for the execution of the new employee’s work.
Data Model

The Business Process entity is Onboarding. It holds information about the job requirements, legal documents for the signing of the contract, starting date and other information about the Onboarding Process. The entity is related to the Employee Access Rights, Contract Forms, Welcome Plan Activities and Company Policies. The relationship between them is one to many.

Employee Access Rights, Contract Forms, Welcome Plan Activities and Company Policies are related to a parameter table. In the activities where these tables are used, information from them is loaded automatically. It is possible to add new records during the life of a case, to the Employee Access Rights and Welcome Plan Activities tables.
Parameter Tables

The model includes several parameter tables.

The Employment Forms entity holds the legal documents that the employee needs to sign. The Statements entity contains the Company Policies needed for the induction of the employee into the company, additionally an entity called Policies has been created. The entity contains a single record with the files of the company policies, thus all the files can be send at once.

The entities Access Rights, Welcome Plan Activities and Requirements contain some records suggested for each case.

It is very important that you review and establish the parameterization of all the entities that suits you best. The information held depends on your company and the countries you work in.
Policies Parameterization

For the Policies entity parameterization.

Go to the Admin Menu on the top of the User’s Work Portal and click on Entities.

Click on the Policies entity, then click on View.
Include all the files of the company policies

Enter all the company policies’ files in a single record of the entity, as shown in the figure, thus you can send all files at once.

**Access Rights, Welcome Plan Activities, Requirements, Contract Form and Statement Parameterization**

It is very important to include in each table the information that the company considers necessary for the entry of a new employee.

For example in the Contract Forms entity it is necessary to include the required documents for the contract signing and other documents required by law or by your company.

In the Rights Access entity it is advisable to include the most used requirements, such as network, user, an email address and the general permissions to folders or servers. When an Onboarding case has started the end user can add any other rights to the case that are considered necessary, but are not found in the general list.

For the Welcome table it is advisable for the Human Resources area to define a general activity plan for an employee’s first week. It is usual to include activities where the new employee is informed about their role, working team, performance measurements, etc.

To administer these entities in the User Portal follow these simple instructions:

Go to the Admin Menu on the top of the User’s Work Portal and click on Entities.
Click on the First Week Activities entity, then in Add First Week Activities
Include a description about the activity.
Define Forms

The Onboarding Process includes several forms. The forms support the management of information.

Several tables containing information about legal documents, employment requirements etc. are handled during the process. To facilitate the handling of information, the process automatically loads information that has been parameterized previously. However it is possible to edit, remove or add additional entries to each of the tables in the activities.

New Hire Actions and Documents Forms

The form includes four tables:

- **Mandatory documents**: Documents that the employee must sign before his first day of work.
- **Optional documents**: Documents those are available to be selected by the Analyst to be signed by the employee before his/her first day of work.
- **Statements or policies** that the employee must read.
- **Statements or policies** that require a physical meeting to be explained and discussed with the employee. These need a date and time scheduling, after the employee´s first day of work.

All documents and activities in the tables are loaded automatically from parameter tables.
Set Employee Requirements and Welcome Plan

The form includes four tables:

- Employee’s Roles: Include the roles that the employee needs to develop for the position.
- Access Rights: Accounts and permissions required within the information systems of the company.
- Requirements: Equipment and supplies necessary to enable the employee to perform his or her work.
- First week activities: An activity plan for the employee’s first week. It must include activities where the employee is informed about their role, working team, performance measurements, among other things.

All documents and activities in the tables are loaded automatically from parameter tables. The Requirements and Welcome Plan tables allow adding and removing records.
### New Employee Information

<table>
<thead>
<tr>
<th>Name</th>
<th>Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>James</td>
<td>Williams</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Telephone</th>
<th>Mobile Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>8555692</td>
<td>880331523</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Personal Email</th>
<th>Curriculum Vitae</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:james@gmail.com">james@gmail.com</a></td>
<td>James CV.pdf</td>
</tr>
</tbody>
</table>

### Employee Roles

**Employee Role:** Purchasing Manager

### Employee Requirements

Include the items needed for this new employee's work

<table>
<thead>
<tr>
<th>Name</th>
<th>Comments</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Network User</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Email Account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Access to remote Software</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### First Week Activities

<table>
<thead>
<tr>
<th>Activity</th>
<th>Activity Date</th>
<th>Location</th>
<th>Responsible</th>
<th>Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review the job description with the employee to answer emerging question</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Describe success measures for the job</td>
<td></td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Describe a typical day in the job and the work group</td>
<td></td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Explain initial assignments</td>
<td></td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Information about meeting and other events on the employee's calendar</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Explain how the employee's performance will be evaluated</td>
<td></td>
<td></td>
<td></td>
<td>No</td>
</tr>
<tr>
<td>Establish goals and provide regular feedback</td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
</tr>
</tbody>
</table>
Business Rules

Define Expressions

The process uses an exclusive gateway to indicate if the process has been launched by the Recruitment and Selection Process or if it has been started by itself.
Activity Actions

On entry to the following activities some information is loaded automatically from parameter tables.

- New Hire Actions and Documents
- Set Employee Requirements and Welcome Plan activities

The next example has been taken from the Set Employee Requirements and Welcome Plan activity.

```csharp
StartingDate = Onboarding.Candidates.StartingDate;
StartingDate = StartingDate.AddDays(-1);
Req = EntityManager.GetEntity("Requirements").GetEntityList("", null, ",", ",");
for (I = 0; I < Req.Length; I++)
{
    Requirements = Me.addRelation("Onboarding.Requirements");
    Requirements.setXPath("Requirement", Req[I].SurrogateKeyValue);
    Requirements.setXPath("RequestedQuantity", Req[I].Attributes["Quantity"] .Value);
    Requirements.setXPath("Selected", true);
    Requirements.setXPath("Parametric", true);
    Requirements.setXPath("DueDate", StartingDate);
}
```
Performers

A Wizard is used to define the Performers in the process. In the fifth step of the Wizard, click on Define Performers

- The following activities are performed by a Human Resources Analyst
  New Employee Information, New Hire Actions and Documents and Signing Contract.
• The Set Employee Requirements and Welcome plan is performed by the person who made the personnel requisition or the boss of the new employee.

• Fill First Week Activities Checklist, is performed by the new employee.
E-Mail Configuration

The Onboarding process includes several email templates to provide information about the requirements for the entry of the employee.

The Project is initialized with the sending of emails enabled, but it does not have the company’s customization. It is therefore necessary to configure the SMTP e-mail server that your company uses.

In Bizagi Studio, click on the Configuration tab and then on Environment and select the Popular option. Enable the box to send notifications and type the name of the SMTP server and the account from which the emails are to be sent, as shown in the diagram below.

For further information refer to the following articles:

Environment Configuration:


SMTP server:

• Send Hire Actions And Documents: An email is send to the new employee informing about the required documents for the contract signing and the links to the company policies that the employee must read.

![Email definition window for sending hire actions and documents]

• Send Welcome Plan: An email is sent to the new employee with the activity plan proposed by the boss and the Access Rights information.

![Email definition window for sending welcome plan]