



Employee Onboarding Flow

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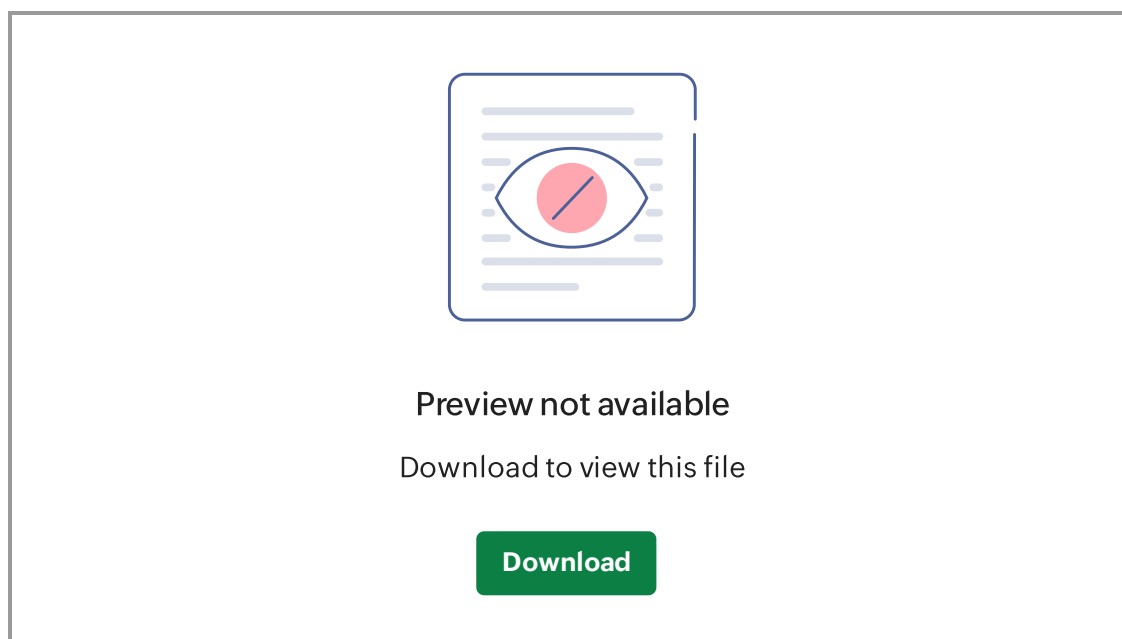
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The Employee Onboarding Flow is designed for the new hires who have joined your organization. This flow can be initiated on their date of joining to provide them with a comprehensive introduction to the company. It includes forms to fill in required information such as address proof, identity proof, and other basic details. Additionally, it covers documents and policies that need to be signed, read, and accepted. The onboarding process also includes introductions to their team members, and a brief overview of their goals and required training for a smooth transition into their role within your organization.

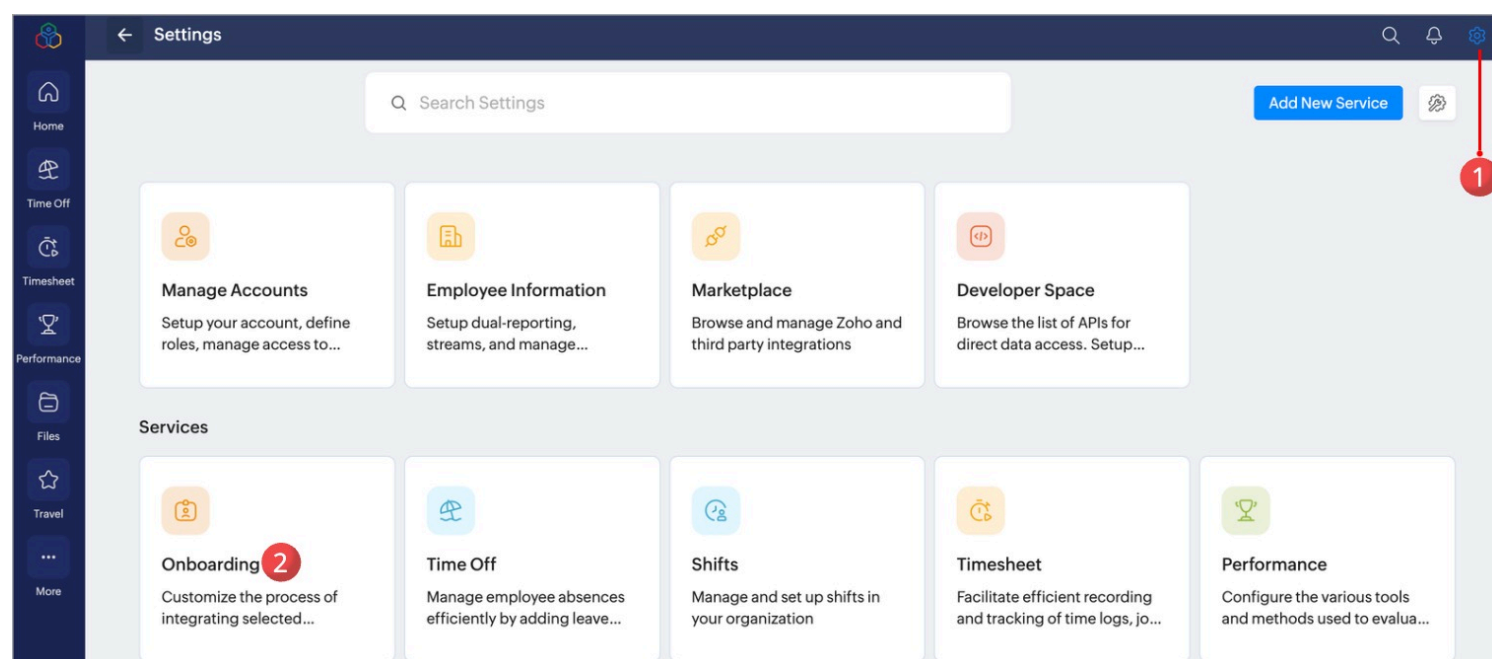
i Employee onboarding is facilitated through Zoho People.

Watch our help video on employee onboarding flow:



Procedure to Set Up a Employee Onboarding Flow

To set up a Employee Onboarding Flow, navigate to **Settings > View all > Onboarding** and do the following.



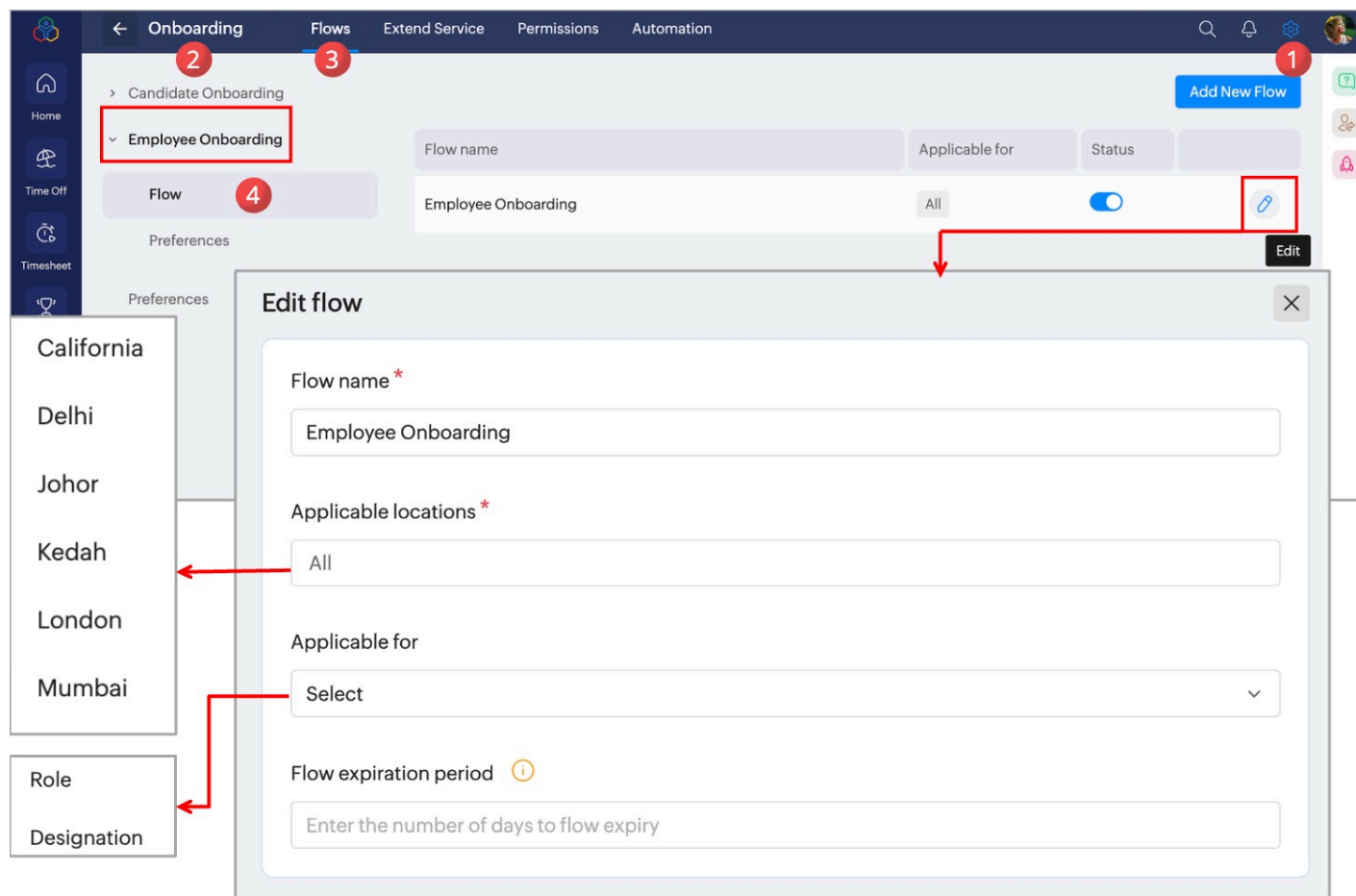
Edit Flow

You can edit the Employee Onboarding flow name to your organizational preference, set flow applicable locations, roles or designations, and the number of days to expiry for the flow from the initiation of the process (optional setting).

To set up flow:

1. Navigate to **Settings > Onboarding > Flows > Employee Onboarding > Flow**, click on the Edit (pencil) icon.
2. Edit the Flow Name to your organizational preference.
3. Select applicable locations for the flow.

The onboarding flow will only be applicable for the selected locations.



4. Select applicable roles or designation for the flow.
The onboarding flow will only be applicable for the selected roles or designations.
5. Enter the Flow expiration period in days and click Save.

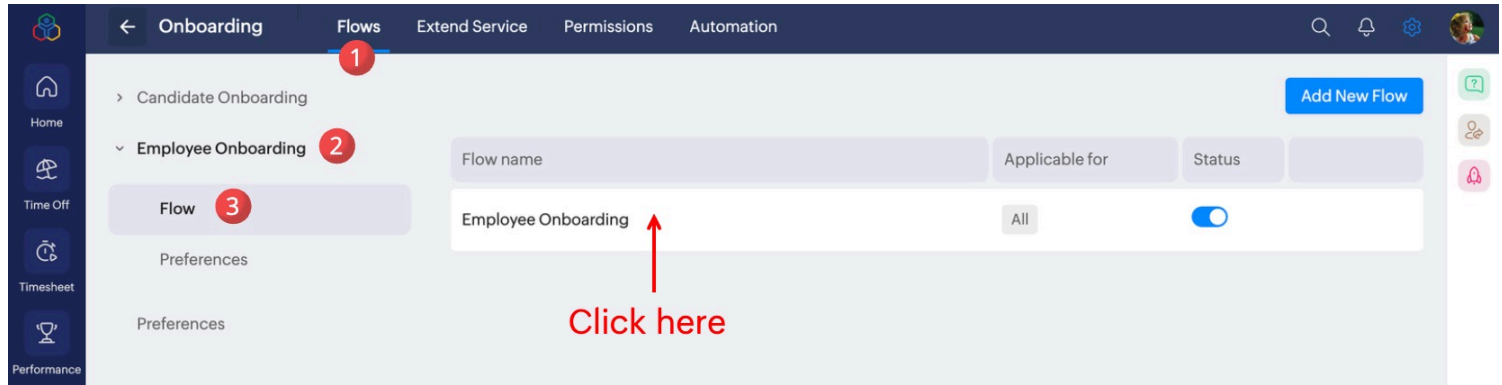
The maximum allowed expiry period is 120 days.

The Employee Onboarding flow will remain accessible for a specified period from the initiation date. For example, if set to expire in 15 days, it will deactivate after that time. Employees will need to contact their HR partner to reactivate the onboarding flow.

Set Up Employee Onboarding Flow

The Employee Onboarding flow contains the following tabs, that you can define and customize to your organizational preference, thereby making the onboarding process for your new hires more aligned with your company's policies and requirements.

To set up a Employee Onboarding Flow, navigate to **Settings > Onboarding > Flows > Employee Onboarding > Flow**, and click on the Flow Name.



Welcome aboard

This is the first page that will be visible to the candidate, specify the required details listed below

- **Home page video URL**

You can add an introductory, orientation, or other company-related video using the Home page video URL. This video will be embedded and viewable by the employee on the welcome page of the portal.

- **Description**

Customize the description shown in the Welcome aboard section to your preference which will be updated in the flow interface.

- **Welcome Feed**

The Welcome Feed will be posted to the new joinee (user) or all department members based on the option selected in the **Post To** dropdown. Employee or the department members can view the feed from **Zoho People Home page > My Space > Overview > Feeds**.


- **Select the HR partner**


Select the HR Contact whom the employees can get in touch with for any queries.

Profile and Other Forms

Customize the description shown in the profile section to your preference which will be updated in the flow interface.

You can tag forms to this section that your employees needs to fill during this onboarding process. Under **Choose Forms**, select the relevant forms that you would like your employee to fill out. You can drag and reorder the forms also mark forms as mandatory if you don't want the employee to skip it.

 To create a new form, refer to [Onboarding - Extended Service](#).

 Select the Multi-page layout for longer forms with multiple sections to make it easier for your employees to fill out. This option is available in the **Settings > Service > Extended Service > Form > Customization** section.

Employee Onboarding View Flow Applicability

Welcome Aboard

Profile and Other Forms

- Documents and Policies ☐
- Team ☒
- Objectives ☐
- Company information ☐
- Checklist

Description

Fill in these important details

Choose forms

Form	Mandatory	<input type="checkbox"/>
Employee		<input checked="" type="checkbox"/>
Address Proof		<input checked="" type="checkbox"/>

Add

Save Cancel Preview Onboarding Flow

Documents and Policies

Customize the Description to your preference, which will be updated in the **Documents and Policies** interface of this onboarding flow.

Enable the **Documents and Policies** tab to share the documents with the employees that are to be signed, read, and accepted once they have joined the organization.

Documents to be read and accepted

Add documents that are to be read and accepted, or signed by the candidate.

Only Mail Merge templates are supported in this section.

To add the documents to this section:

1. Select the predefined Mail Merge Templates from the dropdown.

💡 You can define a mail merger template in Zoho People in **Settings > Onboarding > Automation > Templates > Mail Merge Templates**, where you can set up your custom templates.

Example Mail Merge templates for employee onboarding:

- Non-Disclosure Agreement (NDA)
- Employee Handbook
- Company Policies (IT policy, social media policy and)
- Code of Conduct

For more information on creating mail merge template, refer to [Mail Merge Template - Zoho People](#)

2. Enter the document name. You can include placeholders such as employee form fields, and [global variables](#) in the document name.
3. Select the sign type as:
 - a. **Accept/Decline:** To allow candidates to read and select accept or decline.
 - b. **Zoho Sign:** Allows candidates to read and sign the document. (Available only with the Enterprise plan of Zoho Sign)

E-Sign options are available only if you have integrated Zoho People with any of the available E-Sign platform such as Zoho Sign, DocuSign or Adobe Sign, For more information on e-sign integration, refer to [E-Sign Application Integrations](#).

4. Click **ellipsis** icon to view and edit the documents added from Mail Merge Templates.

5. Click **Add** to add more documents that are to be read and accepted

Documents to be read:

Add documents such as policies or your organizational documents that are to be read by the employee once they have joined the organization.

You can add the documents to this section that are added to your Organizational Files in the Zoho People Files service and for which the applicability is set to all. To add documents to the Organizational Files, refer to [Organizational Files](#).

Team

Customize the Description to your preference, which will be updated in the **Team** interface of this onboarding flow.

Enable this section to inform your new hire about their team members and department head. They can click on Say Hi! on the employee profile to start a conversation and introduce themselves to the team.

Employee Onboarding View Flow Applicability

Welcome Aboard

Profile and Other Forms

Documents and Policies

Team

Objectives

Company information

Checklist

Description

Extend your greetings and kickstart a collaborative journey with your team. Say Hello!

Human Resources

Brown Eileen
Department Head
7 Members

Say hi

ZY198 - Christine Spalding
HR Manager
c.spalding@zyliker.com
6870

ZY194 - Anitha Joshi
HR Manager
a.gaffey@zphone.zyliker.com
6894

ZY181 - Rodriguez Sue
HR Manager
rodriguez@zphone.zyliker.com
6972

ZY134 - Rebecca Biaggio
HR Manager
biaggio@zyliker.com
7254

ZY107 - Rahul J
HR Manager
kaliden@zphone.zyliker.com
7416

Jeenie Smith - Jeenie Smith
HR Manager
jeenie.smith@zyliker.com
-

145 - Pedro Martinez
HR Manager
pedro@zyliker.com
-

Company Information

Customize the Description to your preference, which will be updated in the **Company Information** interface of this onboarding flow.

Provide the website URL in the **Embed Company Website URL** section. This will direct your new hire to the website where they can find information about your company's values, culture, and other important information.

Employee Onboarding View Flow Applicability

Welcome aboard

Profile and other forms

Documents and policies ☒

Team ☒

Company information ☒

Objectives ☒

Training ☒

Checklist

Description

Welcome to the Zylker family! Get updated on our culture, values and a lot more.

Embed company website URL ⓘ

https://www.zoho.com/people/help/administrator-guide/overview.html

Save Cancel Preview Onboarding Flow

Objectives

💡 In Settings > Performance Service, set up performance methods as KRA, KRA and Goals, or KRA vs Goals to tag KRA to this onboarding flow. If the performance evaluation method is set as Goals, you cannot set up KRA in this section. For more details on setting up Performance Methods, refer to [Performance Methods](#).

Customize the Description to your preference, which will be updated in the **Objectives** interface of this onboarding flow.

Objectives section allows you to define Key Result Areas (KRAs) to your new hire based on their Designation, Department and Location they are assigned to. You can tag available KRAs and define their weightage to this section or set up new KRA in Performance service and tag them here.

Through this, the employee will be aware of their expected performance metrics and responsibilities, helping them align their efforts with organizational goals from the start.

Employee Onboarding - View Flow Applicability

Description: Get to know your goals and align them with your teammates*

Designation: [Dropdown: Designation, Department, Location, Designation & Department]

Objectives: [Toggle: On]

Progress: 70% Training, 0% Market Insights, 20% Development, 10% Testing - Automation

Tag KRA Modal:

Designation: Developer

Choose KRA: [3]

- ☐ Market Insights
- ☒ Development
- ☒ Testing - Automation
- ☒ Testing - Manual
- ☐ Competitor Analysis
- ☐ Customer Engagement
- ☐ Technical Writing
- ☐ Creative Writing

KRA Weightage Table:

KRA	Weightage
Testing - Manual	30%
Testing - Automation	30%
Development	40%

Summary: No. Of KRA Selected : (3), Total Weightage: (100)

Buttons: Save, Cancel

Training

The Training section enables you to tag Self-Paced learning courses that employees must complete upon joining the organization through this onboarding process.

Customize the Description to your preference, which will be updated in the **Training** interface of this onboarding flow.



You can define the Self-Paced course in **LMS** service and tag them here. To learn more about Zoho People Learning Management System, refer to [LMS Service](#).

Essential courses such as Company Policies and Procedures, Code of Ethics, Code of Conduct, and IT Security can be tagged here. Mark them as mandatory courses to require completion by your new hires, ensuring they are well-informed and aligned with the organization's standards and practices.

Employee Onboarding
View Flow Applicability

Welcome aboard
Profile and other forms
Documents and policies
Team
Company information
Objectives
Training
Checklist

Description
Complete these courses to get a head start in your career.

Compliance Training
Self Paced Learning

Compliance Training
Self Paced Learning

Tag Course

☒
Mandatory Course

Basics of Marketing
Self Paced Learning

Basics of Marketing
Self Paced Learning

☐
Mandatory Course

Save
Cancel
Preview Onboarding Flow

Checklist

i Checklist in employee Onboarding are limited to administrator use and are not available to employees.

Add Checklists to allow administrators to ensure that the employees have completed all necessary steps in the onboarding process and respective actions to be triggered upon completion of the checklist such as email alerts, field updates and custom functions.

The screenshot displays the 'Employee Onboarding' flow editor. On the left, a sidebar lists various sections: 'Welcome aboard', 'Profile and other forms', 'Documents and policies', 'Team', 'Company information', 'Objectives', 'Training', and 'Checklist'. The 'Checklist' section is highlighted with a red box. In the main area, a table lists the checklist items, with 'Employee Onboarding Checklist' having 6 associated tasks. A red arrow points from this row to the 'Edit Checklist' modal. The modal contains fields for the checklist name, a list of tasks (with 'Add New Task' and 'Select from Existing Tasks' buttons), and a section for actions to perform on completion (currently showing 'Email Alerts').

Employee Onboarding

View Flow Applicability

Checklist name

Associated tasks

Employee Onboarding Checklist

6

Add New Checklist

Add Existing Checklist

Checklist

Save

Cancel

Preview Onboarding Flow

Edit Checklist

Checklist name *

Employee Onboarding Checklist

Task

Add New Task

Select from Existing Tasks

Drag and drop a task below another task to create a nested task

- Allocate place for employee
- Conduct induction program for new joinee
- Provide Laptop for new joinee
- Provide phone to new joinee
- Create login access
- Provide ID Card

Actions to perform on checklist completion

Email Alerts

Cancel

Include a checklist in the flow before converting the candidate to employee to make it available for any subsequent employee onboarding.

💡 To add and know more about Checklist, refer to [Automation - Overview & Use Cases](#).

Once the employee completes the onboarding process, administrators can validate and complete the checklist. Checklist for the employee onboarding record is available in **Operations > Onboarding > Employee Onboarding Reports > Onboarded**. Click on the record to view and complete the checklist.

The screenshot displays the Zoho Onboarding interface. The left sidebar contains navigation icons for Home, Attendance, Leave, Timesheet, Performance, LMS, Cases, and More. The main header shows 'Onboarding' with sub-tabs: 'Track Onboarding' (selected), 'Candidate', and 'Background verification form'. Below the header, there are filters for 'Candidate Onboarding Reports' and 'Employee Onboarding Reports'. The 'Employee Onboarding Reports' section shows a table with columns: Employee Name, Date of Joining, Designation, and Status. Two employees are listed: Evangelin Zillum (Site Engineer, Completed) and George Parker (Graphic Designer, Completed). A red arrow points from the 'Onboarded' filter to the 'Onboarded' status in the table. Another red arrow points from the 'Onboarded' status to a 'Checklist' button. The 'Checklist' button is highlighted with a red circle. The 'Checklist' modal shows a summary of the employee's details and a list of tasks to be completed. The tasks are: 'Allocate place for employee' (No due date), 'Create login access' (Tomorrow), and 'Provide Laptop for new joiner - 1240' (Tomorrow). The status of the checklist is '4 / 4 Completed'.

Employee Name	Date of Joining	Designation	Status
Evangelin Zillum eva@zylker.com	03-Apr-2020	Site Engineer	Completed
George Parker george.parker@zylker.com		Graphic Designer	Completed

Location	Designation
California	Graphic Designer

Checklist	Status
Employee Onboarding Checklist 1240 - George Parker - Today	4 / 4 Completed
Allocate place for employee No due date	
Create login access Tomorrow	
Provide Laptop for new joiner - 1240 Tomorrow	

Add New Flow

Employee Onboarding supports multiple onboarding flow creation, allowing you conduct a personalized employee onboarding process based on your new hire's work location, role, or designation.

To create an Onboarding Flow:

1. Navigate to **Settings > Onboarding > Flows > Employee Onboarding**.
2. Click **Add New Flow**.
3. Enter the Flow name.

The screenshot shows the Zoho Onboarding interface. The 'Add New Flow' modal is open, displaying the following fields:

- Flow name ***: A text input field with the placeholder 'Enter flow name'.
- Applicable locations ***: A dropdown menu with 'All' selected.
- Applicable for**: A dropdown menu with 'Select' selected.
- Flow expiration period ⓘ**: A text input field with the placeholder 'Enter the number of days to flow expiry'.

4. Select the applicable location for this onboarding flow.
5. Select Applicable for based on role or designation.
6. Enter the Flow expiration period in days and click Save.

The maximum allowed expiry period is 120 days.

The Employee Onboarding flow will remain accessible for a specified period from the initiation date. For example, if set to expire in 15 days, it will deactivate after that time. Employees will need to contact their HR partner to reactivate the onboarding flow.

7. After adding the flow, set up the onboarding process. For more details, refer to [Set Up Employee Onboarding Flow](#).

ⓘ You can enable or disable the flow as per your organizational preference.

View Flow Applicability

View Flow applicability allows you to check the applicability of the onboarding flow.

The screenshot displays the Zoho Onboarding interface. The sidebar on the left contains navigation icons for Home, Attendance, Leave, Timesheet, and Onboarding. The main content area is titled 'Onboarding' and includes tabs for Flows, Extend Service, Permissions, and Automation. Under the 'Flows' tab, there is a section for 'Employee Onboarding' with a list of flows. The flows listed are 'Employee Onboarding', 'Finance Manager Onboarding', and 'HR Manager Onboarding'. Each flow has a 'Flow name', 'Applicable for' (with a dropdown menu), and a 'Status' (toggle switch). The 'Employee Onboarding' flow is highlighted, and its 'Applicable for' dropdown is set to 'All'. A modal window titled 'View Flow Applicability' is open, showing filters for 'Designations', 'Roles', and 'Locations', all set to 'All'. The modal also displays a 'Home page video URL' section with a 'Video link' input field, a 'Description' text area, and a 'Welcome feed' section with a 'Post to' dropdown menu.

Employee Onboarding Flow Preferences

Watch our help video on employee onboarding flow preferences:

Preview not available

Download to view this file

[Download](#)

To set the employee onboarding flow preferences, navigate to **Settings > Onboarding > Flows > Employee Onboarding > Preferences**.

Automatically initiate onboarding process

Enable this option to automatically initiate the employee onboarding flow on the provided tentative date of joining by the candidate. This applies to candidates who join on or after enabling this option.

Restrict access to services

Enable this option to restrict employees from accessing Zoho People services until they complete their employee onboarding process. Each time the employee logs in, they will be directed to the Employee Onboarding Flow until completion.

