

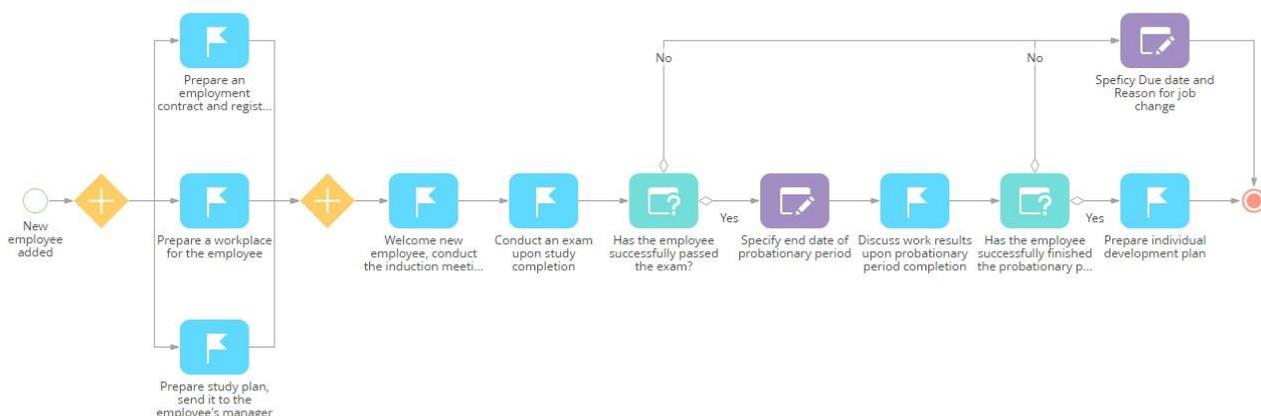
Employee onboarding

Characteristic	Description
Purpose	Employee first day groundwork Preparing the pertinent training required for the job, examination upon training completion Assuring timely examination, discussing the results Probationary period results analysis
Area	HR
Creatio compatibility	All base products on Creatio platform 7.10
Required system objects	Base sections: <ul style="list-style-type: none">• Contacts• Employees• Activities System sections:• Users

List of process participant roles

Role	Responsibilities
Recruiter	Starts the onboarding process
HR Specialist	Onboarding paperwork Employee workplace setup Preparing the pertinent training required for the job Assuring timely examination, discussing the results
New employee's manager	Examination upon study completion Provision of feedback on probationary period results Establishing professional development goals for new employee

Process description



Process step	Role	Step description
New employee added	Recruiter / HR Specialist	Recruiter adds new employee in Creatio with mandatory indication their Manager and Organizational unit. Recruiter or HR Specialist selects new employee record in the [Employees] section and clicks the [Start employee onboarding] action to run the process.
Prepare an employment contract and register new employee	HR Specialist	HR Specialist prepares the necessary paperwork for onboarding.
Prepare a workplace for the employee	HR Specialist	HR Specialist communicates with related departments to have the workplace organized in advance (equipment, software, required system accounts).
Prepare study plan, send it to the employee's manager	HR Specialist	HR Specialist updates the training plan for a new employee in accordance with job responsibilities and sends them to the employee's manager.
Welcome new employee, conduct the induction meeting	HR Specialist	HR Specialist welcomes new employee, introduces their manager and provides the necessary guidance on their first day.
Conduct an exam upon study completion	New employee's manager	New employee's manager conducts the assessment test for a new employee upon study completion.
Has the employee successfully passed the exam?	HR Specialist	HR Specialist discusses with New employee's manager results of the assessment test.
Specify end date of probationary period	HR Specialist	In case of successful exam results, HR Specialist clarifies the end date of the probationary period.
Discuss work results upon probationary period completion	New employee's manager	Based on the probationary period results New employee's manager provides feedback to a new employee.
What results upon probationary period end?	HR Specialist	HR Specialist discusses with New employee's manager work results upon completion of the probationary period.

Prepare individual development plan	New employee's manager	New employee's manager establishes professional development goals and discussing them with a new employee.
Specify Due date and Reason for job change	HR Specialist	If a new employee failed to complete their probationary period, HR Specialist updates the employee information on their Due date and Reason for job change.

Implementation instructions

1. Install the package using the [Installed applications] functionality in [System designer].
2. Add HR personnel in Creatio.
3. Before adding new employees with their organization unit and manager in Creatio:
 - a. add all working employees in the [Employees] section,
 - b. in the lookup [Organization structure items] add all departments (for each department specify their head), and
 - c. update all working employees with their organization unit and manager.
4. If there is an assigned employee responsible for new hires at your company, add their details to the "HR Specialist" system setting.
5. If study period duration of new employee is not equal to 14 days, update the value of system setting "Study period duration, days".
6. To start the process, select a new employee record in the [Employees] section and click the [Start employee onboarding] action.