

# Introduction to On-boarding at kpi.com

On-boarding is a process in which new employees acquire the necessary knowledge, skills, and behaviors to become effective organizational members and employees



# Employee is Hired

When employee is hired, you can create on boarding steps as shown in the screenshot



HRMS	Employee Profile	Goal Management	Performance Appraisals	Attendance Tracking	Recruitment	Onboarding
<b>Onboarding Step</b>		Add Onboarding Step <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Refresh"/>				
<b>Onboarding Period</b>	<b>Action</b>	<b>Onboarding name</b>	<b>Description</b>			
Employment Agreement	▼	Work permit				
Work permit	▼	Residence Visa				
Entry Permit	▼	Renewals				
Air Ticket (Out of the country,	▼	Medical	* Once employee arrives in Abu Dhabi, HR can start org			
Arrival List	▼	Labour Contract				
Medical	▼	Insurance				
Insurance	▼	Entry Permit				
Emirates ID	▼	Employment Agreement				
Labour Contract	▼	Emirates ID				
Residence Visa	▼	CNIA (optional, depends on the client)				
Bank Cards	▼	Cancellations				
Renewals	▼	Bank Cards				
Cancellations	▼	Arrival List	Agent comes back with the list of who, when, where, wit			
CNIA (optional, depends on the	▼					

You can create as many steps as you need for your company with built in custom fields and custom forms.

# How to Start Building an On-boarding Structure for Your Company

1. Go to HRMS On-Boarding and add an on-boarding period

The screenshot displays the HRMS On-Boarding interface. At the top, there are 'Save & Close' and 'Cancel' buttons. Below them is a section titled 'ADD NEW ON-BOARDING PERIOD' with a dropdown arrow. The form contains the following fields:

- Phase Display Name\*: First greeting
- Phase description\*: First greeting (Character limit: 241)
- Phase Starts\*: Within 2 Day from  From the hire date
- Duration\*: 3
- Active\*:

A green arrow points from the 'Phase Display Name' field to the 'Add Onboarding Period' button. Below the form is a table with the following columns: Action, Name, Description, and Period.

Action	Name	Description	Period
▼	First greeting	First greeting	2

On the right side of the interface, there is a list of on-boarding periods:

- Pre Arrival Period
- After Arrival Period

# How to Start Building an On-boarding Structure for Your Company

## 1. Go to HRMS On-Boarding and add an on-boarding period

The on-boarding period contains the following fields:

- Phase display name: enter a title of an on-boarding period
- Phase description: describe the period in two words
- Phase starts: you can specify the start of the period for pre arrival or after arrival. For example, you can indicate that 3 days after employee has arrived, we will conduct a safety training meeting
- Duration: specify the duration of the period (days and months are available)

# How to Start Building an On-boarding Structure for Your Company

## 2. Go to HRMS On-Boarding and add an on-boarding step

An on-boarding step is the step which employee should pass in when they are hired. It can be an activity (greeting, training) or the required document step

Save & Close Cancel

✓ ONBOARDING DETAILS

Onboarding name\*: Visa Documents

Onboarding Period: Please Select

Description:   
Character limit: 255

Previous Step: Please Select

Show in employee profile:

Create onboarding entry form:

✓ ONBOARDING STEP STATUSES

Onboarding step statuses

Item Name	Description	Order
Viza allowance document	Viza allowance documents	1

Character limit: 231

✓ RESPONSIBLE PEOPLE

Responsible people

Employee	Role	Action
Member		
Member		
Project Manager		

Search Employee

Select All Employees

IT

- Addison Green
- Aditya Nurhadi
- Demo User
- Server Foyuloo

When checked, employees can see the on boarding status in their profile

When checked you can create a custom on-boarding entry form

# How to Start Building an On-boarding Structure for Your Company

## 2. Go to HRMS On-Boarding and add an on-boarding step

- *On boarding step name:* indicate the name of an on-boarding step
- *On boarding step description:* give a short description to an on-boarding step
- *On boarding period:* select an onboarding period in the dropdown
- *Previous step:* indicate the previous on-boarding step. This option is not required, however, when you show the previous step, the on-boarding step which you are going to add will start only after the previous step has been completed.
- *Show in employee profile:* when checked, the employees will be able to view their on-boarding status in their profile
- *Create an on-boarding entry form:* when checked, you will be able to create a custom form with custom fields on the on-boarding step
- *On-boarding step statuses:* You can add on boarding step statuses like: not started, in progress, completed, or other custom statuses.
- *Responsible people:* indicate which employees are responsible for successful completion of an on-boarding step

# How to Start Building an On-boarding Structure for Your Company

3. Create an On-boarding entry form in Settings -> Custom Field Management Settings -> HRMS Custom fields

## 1. Go to Settings – Custom Field Settings

The screenshot shows a grid of settings categories. The 'Custom Field Management Settings' category is highlighted with a red border. Below is a list of the settings categories shown:

- Add/Edit your personal, professional Information
- Change your password and email information
- Set email notifications options
- Project Management Settings
- HRMS Settings
- CRM Settings
- Automation Settings
- Custom Field Management Settings**
- Reference Settings
- Permission Management
- Setup Company Subsidiaries
- Module Settings

## 2. HRMS Custom fields

The screenshot shows the 'HRMS Custom Fields' configuration page. It includes a 'New Custom Field' button and a table of existing fields. A large green arrow points from the 'Custom Field Management Settings' box in the previous step to this page.

Entity Name	Action	Field Name
Employee	▼	Face sign
Employee	▼	Medical Insu
Employee	▼	Training Atte
Employee	▼	HEIGHT

# How to Build an On-boarding Structure

## 3. Add New Custom Field Details

- *Relates to:* chose an on-boarding step from the dropdown
- *By Category:* indicate an on-boarding step (only entry form enabled on boarding steps are shown in the list)
- *Field Name:* enter a name of the field
- *Alias name:* indicate the short alias name for the field. It can be the same as field name with underscore \_
- *Data type:* date, text, number, document fields are available
- *Create an on-boarding entry form:* indicate the field type (date picker, document widget)
- *Required:* check this checkbox if the field should be required
- *Visible to:* indicate which people can see the field

The screenshot shows the 'Add New Custom Field' interface. The form fields are as follows:

- Relates to\*:** Onboarding Step
- By Category\*:** Visa Documents
- Field name\*:** Visa expiry date
- Alias name\*:** expiry\_date
- Data type\*:** Date
- Field type\*:** DatePicker
- Show in:**  Show in listing,  Show in filter
- Required:**
- Visible to:** Administrator, HR Manager, Member (with '+ add new' link)

The **Preview** window shows the field rendered as 'Visa expiry date:' with a 'Please Select' dropdown.



# How to Build an On-boarding Structure

## 4. View Your Ready Form and Steps

Go to HRMS - On boarding tab, and view your on-boarding step. You can view your form in the listing and click the add new button

The screenshot displays the HRMS Onboarding interface. The top navigation bar includes tabs for HRMS, Employee Profile, Goal Management, Performance Appraisals, Attendance Tracking, Recruitment, News, and Onboarding. The Onboarding tab is active. On the left sidebar, the 'Work Permit' step is highlighted with a red box. In the main content area, the 'Add Work Permit' button is also highlighted with a red box. Below this, a table lists existing permits for an employee named Addison Green.

Action	Employee	Location	Status	Created date	Modified date
▼	Addison Green	Germany, Berlin, Berli	Active	02-01-2016	02-01-2016

Two green arrows point from the 'Work Permit' step in the sidebar to the text 'An on-boarding step' and from the 'Add Work Permit' button to the text 'On-boarding entry form (if available)'.

# How to Build an On-boarding Structure

## 5. Make the form user friendly

Save & Close Cancel

AL INFORMATION

Type here to search... Expense Claims: Add Expense Claim

Please Select

ONAL INFORMATION

Please Select

Drag and Drop

Save & Close Close

Section	Field label	Show in Form	Mandatory	Default value	Help Message	Split
<a href="#">Remove Section</a>	<b>GENERAL_INFORMATION</b>					
<a href="#">Add Section</a>	Employee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	N/A		<input type="checkbox"/>
<a href="#">Add Section</a>	Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Please Select		<input type="checkbox"/>
<a href="#">Add Section</a>	Expense Claims	<input checked="" type="checkbox"/>	<input type="checkbox"/>	N/A		<input type="checkbox"/>
<a href="#">Remove Section</a>	<b>ADDITIONAL_INFORMATION</b>					
<a href="#">Add Section</a>	Visa Date	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Please Select		<input type="checkbox"/>
<a href="#">Add Section</a>	First name	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>
<a href="#">Add Section</a>	Last name	<input checked="" type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>

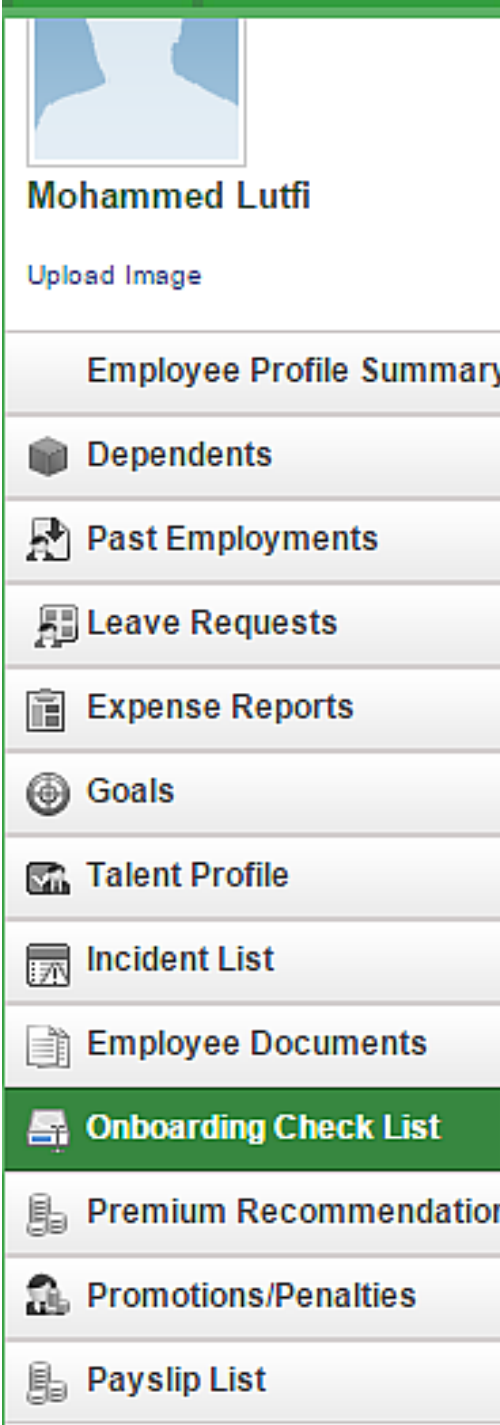
Save & Close Close

Click this button

# How to Build an On-boarding Structure

## 6. The final look in employee self service tab

HRMS Employee Profile Goal Management Performance Appraisals Attendance Tracking Recruitment News Onboarding Employee Information View ×



**Mohammed Lutfi**

Upload Image

Employee Profile Summary

Dependents

Past Employments

Leave Requests

Expense Reports

Goals

Talent Profile

Incident List

Employee Documents

**Onboarding Check List**

Premium Recommendation

Promotions/Penalties

Payslip List

**Period Name: Pre arrival**

Onboarding Step	Description	Responsible people	Status	Form	PDF
Air Ticket (Out of the country, coming with EP)	Once the WP and EP's are sorted, AF HR notifies Agents with list of employees that their EP and WPs are ready and ticket can be purchased		Awaiting ticket ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Arrival List	Agent comes back with the list of who, when, where, with which flight number is arriving.		Not arrived ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Bank Cards	N/A		Not started ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Emirates ID	N/A		Please Select ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Employment Agreement	N/A		Awaiting Employment. ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Entry Permit	N/A		Awaiting Work Permit ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Insurance	N/A		Not Started ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Labour Contract	N/A		Not started ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Medical	* Once employee arrives in Abu Dhabi, HR can start organizing medical checkup process.		Not Started ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>
Residence visa	N/A		Please Select ▼	<a href="#">Entry form</a>	<a href="#">PDF Version</a>

# How to Build an On-boarding Structure

Contact us for questions and feedback



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