

EMPLOYEE ONBOARDING SYSTEM

1. Introduction

Project Overview

The **Employee Onboarding System** is a Salesforce-based application developed to enhance the employee onboarding process by standardizing, automating, and tracking the journey of each new hire from offer acceptance to full integration. This system serves as a one-stop solution for human resources (HR) teams, offering tools for task management, document handling, and communication to ensure every new employee has a smooth and structured onboarding experience. The application leverages Salesforce's capabilities in automation, data management, and reporting, creating a robust environment where HR can efficiently monitor and manage onboarding while focusing on key activities to ensure long-term employee retention and productivity.

Purpose of the Document

This design document serves as a foundational reference for stakeholders, including HR managers, IT administrators, and Salesforce developers. It details the technical structure, objectives, and expected functionalities of the Employee Onboarding System.

By outlining system architecture, requirements, data models, security considerations, and user journeys, this document aims to facilitate understanding and collaboration across teams. It also serves as a basis for future maintenance and enhancement of the onboarding process as organizational needs evolve.

Purpose of the Project

The primary purpose of the Employee Onboarding System is to provide HR teams with the tools to streamline onboarding, ensuring new hires receive consistent information, complete required documentation, and have access to necessary resources. This system addresses common onboarding challenges such as incomplete task tracking, fragmented communication, and loss of documentation by centralizing all onboarding tasks and data within Salesforce. Ultimately, it aims to improve HR operational efficiency, reduce onboarding time, and support new hires in acclimating quickly, contributing to better retention and early productivity.

Project Scope and Objectives

The Employee Onboarding System has a defined scope to cover core functionalities essential to a structured onboarding experience:

- **Employee Information Management:** Capture comprehensive details for each new hire, such as name, department, role, start date, manager, and emergency contacts.
- **Task Assignment and Tracking:** Automatically assign, update, and monitor onboarding tasks with clear due dates and status indicators for HR and new hires.
- **Document Management:** Enable secure uploading, accessing, and storing of essential onboarding documents like contracts, policy handbooks, and offer letters.
- **Communication Tools:** Facilitate communication between new hires and HR, providing a clear channel for task-related queries, feedback, and guidance.
- **Progress Tracking and Analytics:** Provide HR with real-time insights into onboarding progress, enabling data-driven decisions and targeted improvements to the onboarding process.

Key Stakeholders

- **HR Managers:** Oversee the entire onboarding workflow, manage tasks, and access reports and dashboards to ensure each new hire is on track.
- **Onboarding Coordinators:** Track onboarding progress for individual employees, manage document submissions, and act as the main point of contact for new hires.
- **New Hires:** Access assigned onboarding tasks, view required documents, and complete checklists to meet onboarding requirements.
- **IT and Salesforce Administrators:** Implement and maintain the system, manage data security, and troubleshoot any technical issues related to onboarding features.

2. Requirements Gathering and Analysis

Use Case Analysis

The Employee Onboarding System supports multiple user roles to ensure a seamless onboarding experience:

1. **HR Managers:** Responsible for configuring and customizing onboarding tasks, managing document templates, and using analytics to monitor onboarding outcomes.

2. **Onboarding Coordinators:** Oversee the day-to-day onboarding activities, including monitoring task completion, assisting new hires with queries, and updating document submissions.
3. **New Hires:** Use the system to complete onboarding tasks, upload necessary documents, and access key resources to learn about their role, company policies, and team.

Example Use Cases:

- **HR assigns a task:** HR Manager assigns the “Complete New Hire Paperwork” task to a new hire and sets a reminder email to be sent two days before the deadline.
- **New Hire checks task progress:** A new hire logs in to view assigned tasks, completes a checklist, and uploads a signed document, marking the task as “Completed.”
- **Onboarding Coordinator monitors status:** The coordinator checks an onboarding dashboard, reviews task statuses, and follows up with any new hires who have overdue tasks.

Functional Requirements

1. **Employee Data Management:**

- Store core information such as employee ID, role, start date, department, and manager.
- Ensure data integrity and enable easy updates to employee records.

2. Task Assignment and Tracking:

- Enable HR to create, assign, and monitor tasks with deadlines for new hires.
- Task statuses should include "Not Started," "In Progress," and "Completed."

3. Document Management:

- Securely store and categorize documents by type, such as offer letters, policy handbooks, and benefits information.
- Ensure each document has fields for metadata, such as date uploaded, document type, and employee association.

4. Checklist Management:

- Allow HR to create reusable checklist templates, ensuring consistent onboarding steps for each hire.

5. Notification and Reminders:

- Automatically send reminders for pending tasks to employees and notifications to HR when all tasks for a new hire are completed.

Non-functional Requirements

- **Scalability:** Ability to support hundreds of concurrent users and a growing database of onboarding records without performance degradation.
- **Security:** Controlled access to sensitive data, adhering to privacy standards like GDPR and CCPA.
- **Usability:** A user-friendly interface requiring minimal training, with self-explanatory features and intuitive navigation.
- **Reliability:** High availability and consistent performance to ensure uninterrupted onboarding processes.

Data Requirements

1. **Employee Information:** Structured employee records with personal, role-specific, and contact details.
2. **Onboarding Task Data:** Task information including name, due date, assigned employee, and completion status.

3. **Document Storage:** Document management fields, such as document type, upload date, and association to specific employees.
 4. **Checklist Data:** Checklist item tracking to ensure all onboarding requirements are completed by each new hire.
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3. Architecture and System Design

Data Model Design

The data model uses a combination of custom objects and relationships to manage onboarding data:

- **Employee Object:** Stores core information such as employee ID, name, job title, department, start date, and assigned manager.
- **Onboarding Task Object:** Contains details about each task, including task name, due date, status, and assigned employee.
- **Onboarding Document Object:** Used for document management, with fields for document type, upload date, and employee association.

- **Onboarding Checklist and Checklist Item Objects:**
Manages checklist templates and specific items to ensure each new hire completes essential onboarding steps.

Custom Objects, Fields, and Relationships

- **Employee - Onboarding Task (1-many):** Allows HR to assign multiple tasks to each employee.
- **Employee - Onboarding Document (1-many):** Enables each employee to have multiple onboarding documents associated with them.
- **Employee - Onboarding Checklist (1-many):** Tracks checklists assigned to each new hire.
- **Checklist Template - Checklist Item (many-to-many):**
Allows the reuse of checklist items across different checklist templates.

Security Model

The security model leverages role-based permissions to ensure controlled access:

- **HR Manager Profile:** Full access to manage onboarding tasks, documents, and reports.

- **Onboarding Coordinator Profile:** View-only access to onboarding data and limited editing permissions for documents.
- **New Hire Profile:** Limited to viewing and completing assigned tasks, with restricted access to sensitive information.

Flow and User Journey

Automation within the onboarding system includes:

1. **Task Reminder Flow:** Sends email reminders for tasks that are approaching their deadlines.
2. **Onboarding Completion Notification:** Notifies HR managers when an employee has completed all onboarding tasks.

Integration Requirements

The onboarding system integrates with existing Salesforce components and supports external integrations with document storage solutions, enabling document uploads and secure storage.

4. MVP1 - Core Features

4.1 Custom Object Creation

The system includes custom objects for **Employee**, **Onboarding Task**, **Document**, **Checklist**, and **Checklist Template**, each tailored to handle specific onboarding data.

4.2 Fields and Relationships

Each object has detailed fields to capture comprehensive onboarding data:

- **Employee Fields:** Include essential details such as Employee ID, Department, and Start Date.
- **Onboarding Task Fields:** Include Task Name, Due Date, Status, and Assigned Employee.
- **Document Fields:** Capture document type, upload date, and employee association.

4.3 Record Types and Page Layouts

Record types differentiate between **Full-Time**, **Part-Time**, and **Contractor** employees, with custom layouts that display relevant data based on role.

5. MVP2 - Dashboard and KPIs

5.1 Report Creation

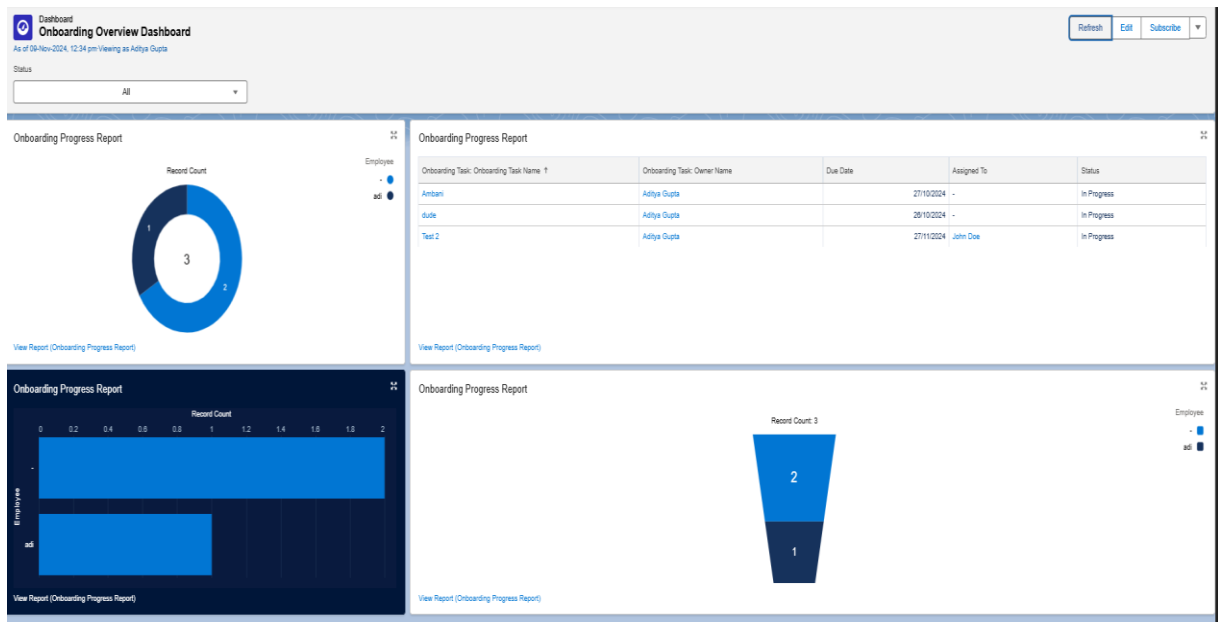
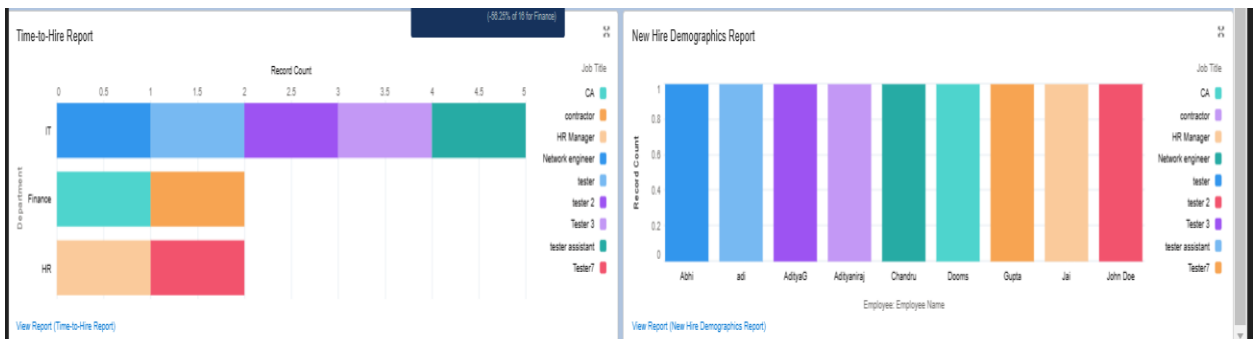
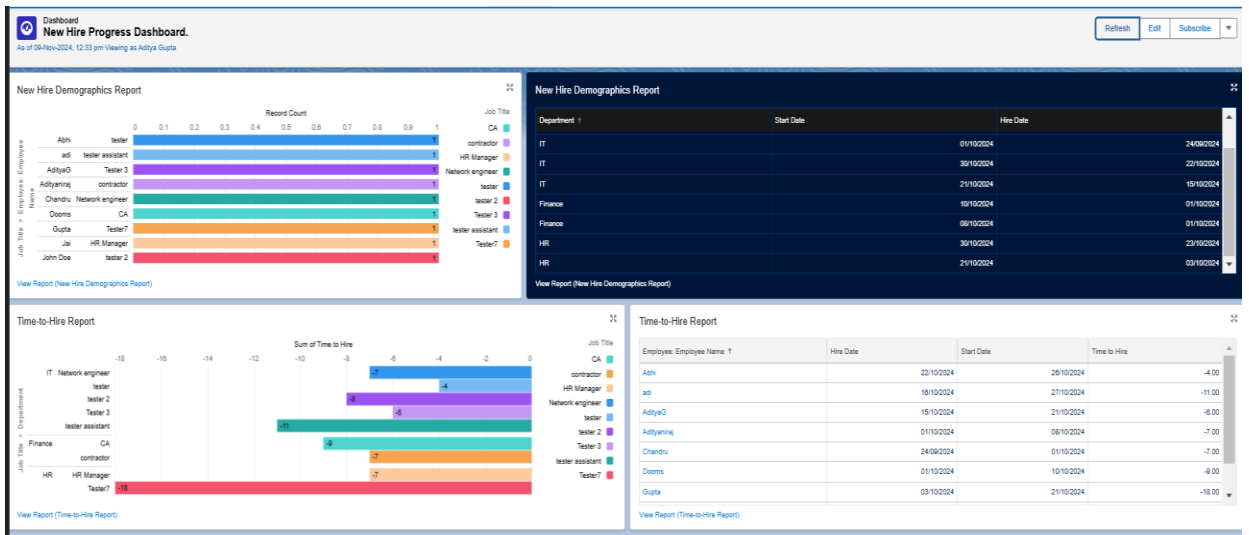
Key reports include:

- **Onboarding Progress Report:** Visualizes the completion rate of tasks for each new hire.
- **Time-to-Hire Report:** Tracks hiring efficiency, analyzing time spent from offer acceptance to onboarding completion.
- **New Hire Demographics Report:** Analyzes employee demographics by department, role, and start date.

5.2 Dashboard Development

The dashboard includes:

- **Onboarding Overview Dashboard:** Summarizes overall onboarding completion rates and average time-to-completion.
- **New Hire Progress Dashboard:** Displays each new hire's progress, helping HR track outstanding tasks and completed checklists.



6. UI/UX Design

The system's UI includes task-oriented layouts with:

- **Employee Portal:** Provides new hires with access to assigned tasks and documents.
 - **HR Dashboard:** Displays overall onboarding statuses and task completion metrics.
 - **Onboarding Task Page Layouts:** Organized layouts with task instructions and completion steps.
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7. Conclusion

Summary of the Project

The Employee Onboarding System automates HR onboarding tasks within Salesforce, creating a structured, accessible system that reduces manual tracking, improves data accuracy, and enhances the new hire experience. By consolidating onboarding activities, it ensures consistency and efficiency, empowering HR teams to better support new hires in their transition.

Acknowledgments



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