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Employee Onboarding System

User Guide for HR Administrators & Consultants

Version 1.0 | January 2026

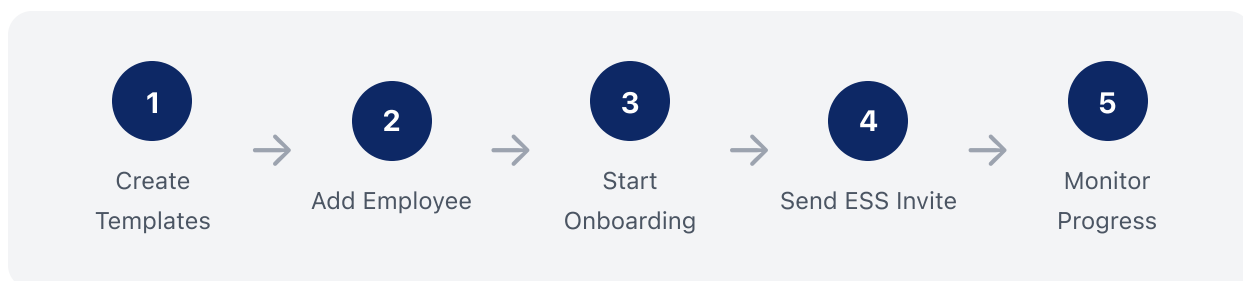ConsultPro by Rozitech

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1. Quick Start

Before You Begin

Ensure you have completed the following setup tasks:

☐   Created document templates for your organization

☐   Added the employee to the system with their details

☐   Set up company policies (optional but recommended)

Basic Workflow

1 Create Templates → **2** Add Employee → **3** Start Onboarding → **4** Send ESS Invite → **5** Monitor Progress

> **Pro Tip**
>
> Set up all your document templates before starting any onboarding. This ensures every employee receives consistent, professional documentation.

2. Document Templates

What Are Document Templates?

Document templates are reusable documents (contracts, NDAs, policies) that automatically populate with employee-specific data. Instead of manually editing each document, you create one template and the system fills in employee details automatically.

Accessing Document Templates

Navigation   Employee Management → Document Templates

Creating a New Template

1. Click **+ New Template**

2. Fill in the template details:
   - **Template Name:** A descriptive name (e.g., "Standard Employment Contract 2024")
   - **Template Type:** Select the document type
   - **Description:** Brief description for your reference

3. **Write your document content** using the rich text editor:
   - Use the toolbar to format text (bold, italic, headers, lists)
   - The editor works like Microsoft Word or Google Docs

4. **Insert placeholders** by clicking the blue buttons

5. Click **Create Template**

Available Placeholders

Placeholder	Description	Example Output
`{{employee_name}}`	Full name (First + Last)	John Doe
`{{employee_first_name}}`	First name only	John
`{{job_title}}`	Position title	Software Engineer
`{{department}}`	Department name	Engineering
`{{hire_date}}`	Employment start date	15/01/2026
`{{company_name}}`	Company name	Acme Corporation Ltd
`{{salary}}`	Basic salary	NGN 500,000
`{{manager_name}}`	Line manager name	Jane Smith
`{{current_date}}`	Today's date	07/01/2026
`{{probation_end_date}}`	Probation period end	15/04/2026

Template Types

Type	Used For	Onboarding Phase
Offer Letter	Initial job offer	Phase 1
Employment Contract	Terms of employment	Phase 1
NDA	Non-disclosure agreement	Phase 1
NDPA Consent	Data protection consent	Phase 1
Code of Conduct	Company behavior standards	Phase 1
Job Description	Role responsibilities	Phase 2
Org Chart	Reporting structure	Phase 2
Key Contacts	Important contacts list	Phase 2

Example Template

```
EMPLOYMENT CONTRACT

This Employment Contract is entered into on {{current_date}} between:

EMPLOYER: {{company_name}}
EMPLOYEE: {{employee_name}}

1. POSITION
You are appointed as {{job_title}} in the {{department}} department,
reporting to {{manager_name}}.

2. COMMENCEMENT
Your employment begins on {{hire_date}}.

3. REMUNERATION
Your gross monthly salary is {{salary}}, payable on the last
working day of each month.

4. PROBATION
You will be on probation until {{probation_end_date}}.

Please sign below to confirm acceptance of these terms.


_____
{{employee_name}}
Date: _____
```

3. Starting Employee Onboarding

Prerequisites

Before starting onboarding, ensure the employee exists in the system with at least:

- Full Name

- Email Address

- Job Title

- Department

- Hire Date

Add Employee	Employees → + Add Employee

Starting the Onboarding Process

1. Navigate to **Employee Management → Onboarding Workflow**

2. Click **+ Start Onboarding**

3. Select the employee from the dropdown list
   - Only employees not already in onboarding will appear

4. Click **Start Onboarding**

> The system will automatically create an onboarding record, generate documents for each phase based on your templates, and set the employee's status to "Preboarding".

Sending ESS Invitation

After starting onboarding, the employee needs access to the Employee Self-Service (ESS) portal:

1. In the Onboarding Workflow page, find the employee

2. Click **View Details**

3. Click **Send ESS Invite**

The employee will receive an email with:

- Link to the ESS portal

- Instructions to set up their password

- Their onboarding tasks

4. Monitoring Progress

Onboarding Dashboard

Navigation	Employee Management → Onboarding Workflow

The dashboard displays:

- **All employees** currently in onboarding

- **Current phase** for each employee

- **Progress percentage**

- **Status** (In Progress, Blocked, Completed)

Viewing Employee Details

Click on any employee row to see:

- Document completion status for each phase

- Which documents are pending/signed/acknowledged

- Profile completion percentage

Refresh Documents

If templates were updated after onboarding started:

1. Open the employee's onboarding details
2. Click **Refresh Documents**
3. New documents will be created based on current templates

5. The 5 Onboarding Phases

1   **Document Signing (Hard Gate)**

What employees do:

- Sign Offer Letter
- Sign Employment Contract
- Sign NDA
- Acknowledge NDPA (Data Protection)
- Acknowledge Code of Conduct

Hard Gate

Employee cannot proceed to Phase 2 until ALL Phase 1 documents are completed.

2   **Role Clarity**

What employees do:

- Review and acknowledge Job Description
- Review Organizational Chart
- Review Key Contacts

This phase helps employees understand their role and reporting structure.

3   Employee File (Hard Gate)

What employees do:

- Complete their profile (minimum 80% required)
- Upload required documents:
    - Passport photographs
    - Educational certificates
    - Government ID (NIN, Driver's License)
    - Professional certifications (if applicable)

> **Hard Gate**
>
> Phase 3 must be verified by HR before employee can proceed.

4   Policy Acknowledgments

What employees do:

- Read and acknowledge company policies
- Policies are pulled from the Compliance module

> **Setting Up Policies**
>
> Navigate to Compliance & Training → Policies to add your company policies.
> Policies marked as active will automatically appear in Phase 4.

⑤ Complete

What happens:

- Onboarding is marked complete

- Employee status changes to "Active"

- Probation check-in tasks are auto-scheduled (30, 60, 90 days)

6. Employee Experience (ESS)

What Employees See

When employees log into ESS, they see:

1. **My Onboarding** - Their personalized onboarding wizard

2. **Progress bar** - Overall completion percentage

3. **Phase tabs** - Navigate between phases (locked phases show padlock)

4. **Document list** - Documents to sign/acknowledge/upload

Employee Actions

Document Type	Employee Action
Requires Signature	Click View → Review → Sign Document (draw signature)
Requires Acknowledgment	Click View → Read → Click "I Acknowledge"
Requires Upload	Click Upload → Select file → Submit

Document Status Badges

Pending　Not yet completed

Signed　Signature submitted

Acknowledged　Document acknowledged

Uploaded   File uploaded, awaiting HR verification

Verified   HR has verified the upload

Rejected   HR rejected, needs re-upload

7. Troubleshooting

"No templates found for document type"

Problem: Generic placeholder content appears instead of your template.

Solution:

1. Go to Document Templates
2. Create a new template
3. Select the correct Template Type
4. Ensure "Active" is checked

"Employee not appearing in onboarding list"

Problem: Employee doesn't show when starting new onboarding.

Possible causes:

- Employee is already in onboarding (check existing list)
- Employee record is missing required fields
- Employee status is not "Preboarding" or "Active"

"Documents showing 0 created"

Problem: Clicking "Refresh Documents" shows 0 documents created.

Solution: Documents may already exist. Check the employee's document list in their onboarding details.

"Employee can't see their onboarding"

Problem: Employee logs into ESS but sees "Onboarding Not Started."

Possible causes:

1. Onboarding wasn't started - Go to Onboarding Workflow and start it

2. ESS invite not sent - Send the ESS invitation

3. Employee logged in with wrong account - Verify email address

"Employee stuck on a phase"

Problem: Employee completed all documents but can't proceed.

Check:

- For Phase 1 & 3 (hard gates): All documents must be completed

- For Phase 3: Profile must be 80%+ complete

- For Phase 3: HR must verify uploaded documents

8. Quick Reference

Key Navigation Paths

Task	Navigation Path
Create document templates	Employee Management → Document Templates
Start employee onboarding	Employee Management → Onboarding Workflow → + Start Onboarding
View onboarding progress	Employee Management → Onboarding Workflow
Manage policies	Compliance & Training → Policies
Add new employees	Employees → + Add Employee

Best Practices

1. **Set Up Templates First** - Create all document templates before starting any onboarding for consistency.

2. **Use Meaningful Template Names** – Include version or date: "Employment Contract v2024"

3. **Test the Flow** – Create a test employee and go through the entire process yourself.

4. **Keep Policies Updated** – Regularly review and update policies in the Compliance module.

5. **Monitor Dashboard Daily** – Check for stuck employees and verify uploads promptly.

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