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**Employee Onboarding**

E **Business Requirements Design**

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Change History

The following Change History log contains a record of changes made to this document:

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Table Of Contents

[1. Introduction 4](#_Toc472091741)

[1.1 Contacts 4](#_Toc472091742)

[1.2 Related Documentation 4](#_Toc472091743)

[1.3 Terminology and acronyms 4](#_Toc472091744)

[2. Executive Summary 5](#_Toc472091745)

[2.1 Overview 5](#_Toc472091746)

[2.1.1 Business Case 5](#_Toc472091747)

[2.1.2 Current State 5](#_Toc472091748)

[2.1.3 Proposed State 5](#_Toc472091749)

[2.2 Project Assumptions 5](#_Toc472091750)

[2.3 Project Constraints 5](#_Toc472091751)

[2.4 Project Risks](#_Toc472091752) 5

[3. Project Requirements](#_Toc472091755) 6

[3.1 Requirement 1 – ADMIN login](#_Toc472091756) 6

[3.2 Requirement 2 – recruiter’s login](#_Toc472091756) 6

[3.3 Requirement 3 – Candidate login](#_Toc472091757) 7

[3.4 Requirement 4 – onboarding Status](#_Toc472091758) 7

[3.5 Requirement 5 – HR Login and rewiev documents](#_Toc472091759) 8

[3.6 Requirement 6 – Account Manager login and processes the onboarding](#_Toc472091760) 8

[3.7 Requirement 7 – leadership/Approver login and approve](#_Toc472091761) 8

[3.8 Requirement 8 – offer generation / rollout process](#_Toc472091761) 9

[4. annexture](#_Toc472091755) 10

[4.1 NOTIFICATIONS LIST](#_Toc472091756) 10

[4.2 STATUS LIST](#_Toc472091756) 11

[4.3 WORKFLOW DIAGRAM](#_Toc472091757) 11

[4.4 SCREEN DESIGN](#_Toc472091758) 11

# Introduction

## Contacts

| Name | Role |
| --- | --- |
| Ramana | Architect & Technical SME |
| Radhakrishna Mocherla | Product owner & SME |
| Anil Kumar | QA Lead |

## Related Documentation

| Document | Location | Version | Date |
| --- | --- | --- | --- |
| OnBoarding Process.docx |  |  |  |

## Terminology and acronyms

This table defines the client-specific terminology and acronyms used in this document

| Term | Definition |
| --- | --- |
| CRM | Customer relationship manager |
| BD | Board of Director |
| HR | Human Resource |

# Executive Summary

## Overview

### Business Case

This system intends to redesign Careator’s Onboarding process to eliminate paper, ensure compliance, and simplify the process by converting all new hire documents to workflow-enabled eForms, personal data, confidentiality agreements, employee acknowledgments, and more. With rule-driven workflow, approval routing, and direct updates to all stakeholders, this will simplify and standardize process management. The system focuses on onboarding which has two aspects respectively known as Internal and External onboarding’s.

### Current State

Currently in the onboarding process all the documents and files are shared by the candidates are via E-mail which makes the process slow and makes it a tedious task.

### Proposed State

An interactive portal-based solution that is configurable to automate the process from Employee Documentation to offer approval. The new process starts once the recruiter receives the instruction to collect all the documents from the candidate

## Project Assumptions

| ID | Assumption Description | Potential Risk Areas |
| --- | --- | --- |
| A1 | This system is going to make onboarding fast and efficient. | NA |
| A2 | There will be easy track of tasks and documents. | NA |

## Project Constraints

| ID | Constraint Description | Mitigation |
| --- | --- | --- |
| C1 |  | . |
| C2 |  |  |

## Project Risks

| ID | Risk Description | Mitigation |
| --- | --- | --- |
| R1 |  |  |
| R2 |  |  |

# Project Requirements

## Requirement 1 – ADMIN login

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Recruiter will login into the system and will enter the basic informations of the candidates. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R1.1** Admin credentials should be created from backend and admin should be able to login to the system from UI.

**R1.2** Admin should create internal users (Recruiter, HR, Account Manager and Leadership) in the system and notification should be sent to the users.

**R1.3** In the admin page list of created users should be displayed.

**R1.4** When admin clicks on create user button system should redirect to create user page.

**R1.5** In create user page there should be fields – first name, middle name, last name, user email Id, Mobile No, Designation, Employee ID. Except middle name all other fields should be mandatory to fill.

**R1.6** Create and Cancel buttons should be displayed in admin page. After filling the details admin will click on create button and system should display success message. Once user is created it should be displayed in the list of created users in dashboards.

**R1.7** When admin clicks on Cancel button system should erase all the filled details and admin is supposed to refill all the details.

**R1.8** Admin can delete/deactivate any user if required. System will check if any candidature in progress is assigned to the user if yes then that candidature should be assigned to the similar profile user.

## Requirement 2 – recruiter’s login

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Recruiter will login into the system and will enter the basic informations of the candidates. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R2.1** Recruiter should be able to login to the system using his/her credentials. Also there should be forgot password option to reset new password.

**R2.2** Recruiter should be able to update the Jobs requirements

**R2.3** Once recruiter logins to the system he/she should get option to create for the candidate. Fields – (Full Name, Mobile Number and Email ID.)

**R2.3** Recruiter should review the uploaded document by candidate. If documents are not satisfactory in that case recruiter will ask for resubmit of the document by the candidate.

**R2.4** Recruiter should review the document and Submit for HR.

**R2.5** Recruiter should be able to see the status of the candidature.

## Requirement 3 – Candidate login

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Candidate should be able to login using the shared link. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R3.1** The candidate should be able to login to the system using shared link.

**R3.2** User should view the welcome onboard message with onboarding checklist to complete.

**R3.3** It will list the various forms by name, provide form descriptions and instructions (where appropriate), and the list of documents to be submitted. There should be option to upload the files and forms to the system by the user.

**R3.4** User should be able to navigate the forms and it should be auto saved during uploads.

**R3.5** Uploaded files status should be under review until it’s reviewed by the recruiter.

**R3.6** There should be save button to save the uploaded documents if candidate wants to upload remaining documents later.

**R3.7** There should be submit button to complete document submission. System should display success message once clicked on submit button.

**R3.8** User should be able to upload documents in PDF, Word, PNG, and JPEG format

**R3.9** Size of the documents should not exceed more than 25 MB.

## Requirement 4 – onboarding status

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Onboarding checklist should notify the candidate about the status of forms summited in the portal. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R4.1** Once the forms and documents are uploaded by the candidate recruiter should review them.

**R4.2** Candidate should get notifications via email and text messages once candidate’s forms are reviewed. In case of overdue of any document also candidate should get notifications.

**R4.3** Recruiter, HR, Account Manager, Leader should be able to track Candidature status.

## Requirement 5 – HR Login and rewiev documents

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | HR should be able to review the candidate’s documents. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R5.1** HR should be able to login to the system and view dashboard.

**R5.2** HR should be able to review the documents once those are reviewed and submitted by recruiter.

**R5.3** HR can initiate for Background verification if the is something wrong with the candidate and documents. Background verification notification should be sent to recruiter.

**R5.4** HR can ask for resubmit of the documents. Candidate should get notification via E-mail and text messages about the status of the forms and documents in case of resubmit.

**R5.5** There should be status option to move “Ready Hire “if HR is satisfied with the document.

**R5.6** System should notify Account Manager once documents are reviewed by HR and status is moved to “Ready Hire “.

## Requirement 6 – Account Manager login and processes the onboarding

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | CRM should login to the system and process the onboarding. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R6.1** CRM should be able to login and system should display the dashboard.

**R6.2** CRM will fill in the CTC, DOJ, Rate, Client details and will raise the offer request through the system to the Leadership.

## Requirement 7 – leadership/Approver login and approve

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Leadership/BD head should login to the system and approve the onboarding. | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R7.1** Leadership should be able to login to system and view dashboard.

**R7.2** Leadership should have option to approve or reject the offer.

**R7.3** Once offer is approved system should send notification to HR.

**R7.4** Once offer is rejected system should send notification to HR, Account Manager and Recruiter.

## Requirement 8 – offer generation / rollout process

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Brief Overview | | Determines offer rollout process | | |
| **Requirement Type:** | **Original, Added, Modified** | | **Date** | **Requirement # and Source of Requirement** |
| Functional | Original | | 2021-05-12 | OnBoarding Process.docx |

**R8.1** Once Offer is approved by Leadership, HR will get notification.

**R8.2** HR will Release offer and system should send notification to the candidate.

**R8.3** Once offer is released to candidate system should enable two buttons respectively “Accept” and “Reject” and candidate should be able to view these when they login to the system.

**R8.4** Candidate either can accept or reject the offer clicking on respective buttons. In any case system should send notifications to respective Recruiter, HR, Account Manager, and Approver.

**R8.5** Once candidate clicks on accept button system should prompt a calendar asking to select a date available to join the company.

**Test validations:** System should not allow to select past date, holiday date or weekends date.

**R8.6** Once candidate clicks on reject button system should prompt to write the reasons to reject offer at least in 100 words.

**R8.7** Once offer is accepted by the candidate the process ends else the recruiter has to restart the whole process again.

# Annexure

## Notifications list

|  |  |  |  |
| --- | --- | --- | --- |
| Email | From(System generated) | To/Receiver | Email-Notifications |
| E1 | Admin | Recruiter | Email - Recruiter Created |
| E2 | Admin | HR | Email - HR Created |
| E3 | Admin | Account Manager | Email - Account Manager Created |
| E4 | Admin | Leader | Email - Leader Created |
| E5 | Recruiter | Candidate | Email - Candidate Created |
| E6 | Recruiter | Candidate | Email - Notification to candidate to resubmit |
| E7 | Recruiter | HR | Email - Notification to HR for review |
| E8 | Candidate | Recruiter | Email - Notification to recruiter about documents  uploaded by candidate |
| E9 | Candidate | HR | Email - Notifications to HR that candidate accepted the offer CC : Recruiter , AM and Approver |
| E10 | Candidate | HR | Email - Notifications to HR that candidate rejected the offer CC : Recruiter , AM and Approver |
| E11 | HR | Recruiter | Email - Notification to recruiter to initiate BGV |
| E12 | HR | Candidate | Email - Notification to candidate to resubmit CC : Recruiter |
| E13 | HR | Account Manager | Email - Notification to AM for review |
| E14 | HR | Candidate | Email - Notification to candidate about offer release |
| E15 | Account Manager | Leader | Email - Notification to approver about offer request initiated |
| E16 | Leader | HR | Email -Notification to HR to release offer |
| E17 | Leader | Account Manager, HR, Recruiter | Email - Notification to AM, HR, and Recruiter about Rejection |
| E18 | HR | Account Manager | Email - Notification to AM about negotiation  CC : Approver |

**Note: -** Please refer workflow diagram for better understanding of notification sent from sender (system generated) to receiver based on different functionalities.

## Status List

|  |  |
| --- | --- |
| CC | Candidate created |
| RRD | Recruiter Review Done |
| DU | Documents Uploaded |
| CAO | Candidate accepted offer |
| CRO | Candidate Rejected Offer |
| CC | Candidate created |
| HRD | HR Review Done |
| OR | Offer Released |
| ORI | Offer Request Initiated |
| ORA | Offer Request Approved |
| ORR | Offer Request Rejected |

## Workflow diagram



## Screen design

