

Microexcel Automates HR Onboarding Process for a Global Investment Major

Business requirement:

The Client is a US based global investment firm with approximately \$10 billion in assets under its management. As the company continues to expand the Hr onboarding process which is manual is becoming increasingly difficult to manage. With each new employee, there are large numbers of tasks to be completed by various members of Management, HR, and IT. With this business need the Client decided to address this issue by automating the process management and engaged Microexcel Inc., a Microsoft Gold to implement the solution.

Key Objectives:

- No task gets forgotten
- Spend less time tracking down status and more time doing real work

Solution:

Onboarding is a long-term process that begins before an employee starts and continues well into their first few months. To model it in SharePoint and to implement this process, Microexcel took the help of third party tool Nintex forms and Workflows. The following are the different phases of process.



➤ **New Hire Request:**

HR Manager can raise new Job request. The requirement for each job position there would be only one Job request, it is one to one relation because they hire 2-3 positions in a year.

HR Manager can create new job request by referring the existing job request which was processed in past. The job request form was implemented using Nintex forms. While creating job request HR Manager can enter all the details like job title, job description, company (sub-companies), Upload document for job description if any, Department details for Job request.

Once Job request is created it sends a notification to Legal & Compliance Team and HR Manager Team. Next, the Job request will be reviewed and get approved by L&C team. Once job request get approved then HR Manager can see it in Open Job requests section on landing page.

And for that Job request HR can upload multiple resumes for further processing.

➤ **Interview Process:**

HR manager can upload multiple resumes for selected position and it will trigger workflow for each candidate. So it's easy to track all the history of job request at any point of time or in future too.

While uploading resume HR can enter candidate's name, salary details, leave details, location, recruiter (Internal/External) etc. Once the resume is uploaded the candidates' interview schedule is displayed and the feedback for that candidate can be obtained through the system. The candidate also goes through COO review, COO can approve or reject the candidate. If candidate get rejected the status for that profile would be 'Closed by COO rejection'. If the candidate is approved and come out of this process, and offer will be ready for release. Simultaneously the HR can initiate background check process and get the details from the respective team.

➤ **Onboarding Process:**

Onboarding is a long-term process that begins before an employee starts and continues well into their first few months. HR can trigger this process by selecting the candidate for job request and initiate the onboarding process. HR gets the offer letter template for the interviewed candidates and job requests. HR can fill up the details and send it to candidate. Meanwhile a task assigns to HR - 'Is offer sent' and 'is offer accepted', once HR selected YES for both tasks, it will be closed the and profile with 'Selected' status and job request status would be 'Closed'. System will send notifications to various teams like HR, Account, L&C, and Technical to complete the respective tasks for new hire. Each team completes their respective tasks and here the process ends for Job Request.

Benefits of the solution for business:

Higher Visibility; HR Manager/ Higher authority group can see history/tasks for each Job Request and candidate status. The report can be generated for selected job requests/ current open job requests.

Single Location Repository: All the documents maintain in repository w.r.t. job requests and candidates at one location, so it's easy to access

Familiar Process: And the process is as similar as they were used to. Additionally with less paper work and every stage of the process can be trackable.

About Microexcel

Established in the year 2001, Microexcel Inc is a Microsoft Gold Certified Partner and a global leader in providing innovative and comprehensive software solutions. With a proven track record in providing quality, cost effective and timely Information Technology professional services and solutions, Microexcel merges people and technology to deliver value. Headquartered in Secaucus, NJ, Microexcel has branch offices near Chicago-IL, New York, Santa Clara and Torrance – CA, Orem – UT, Dubai-UAE, Johannesburg-South Africa and two offshore locations at Hyderabad, Bangalore and Pune in India. With over 1500 employees based in the USA and India, Microexcel provides support to Clients in the areas of Microsoft Technologies including .Net and SharePoint, SAP Applications (Certified SAP Services & VAR Partner), Quality Assurance Testing (Micro Focus, HP & ISTQB Partner), J2EE, IT Infrastructure (VMware Partner), Informatica (Business Partner) and Interactive Services.

To learn more about how you can benefit from our IT expertise and professional services, please visit our website or send us an email to www.microexcel.com, sales@microexcel.com