Human Resources: Practice Project #2

In this activity, you will be setting up a Sys.tm Flow to help automate the Human Resources employee onboarding process. This flow will send user tasks to the newly-hired employee, the HR department, and the IT department, prompting each person to take steps to get the new employee set up for benefits, payroll, and computer systems.

1. Log into Sys.tm at www.sys.tm/signin or create an account with a free 30 day trial at www.sys.tm/signup.
2. Before starting this project, make sure you have downloaded the HR Sample Documents. Click here to access and download the sample documents you will be using for the Human Resources Projects. If you have already downloaded these files, you do not need to repeat these steps.
    a. When downloaded, navigate to the **HR-Sample-data.zip** file on your PC
    b. Right-click on the **ZIP file** and choose **Extract All**
    c. When prompted to choose a location to save the extracted files, navigate to your **desktop** and click **Extract.** Or you can click **Extract All** in the file explorer **toolbar**

Administration and Setup:

1. On the Sys.tm Dashboard under **Features**, click **Files**.
2. Create folders for Active and Inactive Employees.
    a. On the right, click **New Folder**.
        i. For **Folder Name**, type **HR Documents**.
        ii. Click **Create** to close the Create Folder window.
    b. Click the **HR Documents** folder to see its contents.
    c. On the right, click **New Folder.**
        i. For **Name**, type **Active Employees.**
        ii. Click **Create.**
    d. On the right, click **New Folder**.
        i. For **Name**, type **Inactive Employees.**
        ii. Click **Create.**
3. Click the **Sys.tm icon** in the top-left to return to the Dashboard.
4. Add Employee Status as a Metadata Property.
    a. On the Dashboard under **Features**, click **Metadata**.
    b. Click **Create**.
        i. For **Name**, type **Employee Status**.
    c. Click **Create** to close the Create New Property window.
5. Add the new metadata field to the collection created in Project 1.
    a. Click the **Collections** tab.
    b. Click the three dots for **Employment Applications** and select **Properties**.

i. Click the **Add Property** icon (plus sign) next to **Property Name**.
   1. Select the checkbox next to **Employee Status**.

ii. Click **Add** to close the Add Properties to Collection window.

c. Click **Save** to close the Employment Applications - Properties window.

6. Click the **Sys.tm logo** in the top-left corner to return to the Dashboard.

Create an HR Onboarding Flow:

1. Create a new Flow.
   a. On the Dashboard under **Features**, click **Flows**.
   b. On the right, click **Create** and select **Designer**.
      i. For **Name**, type **HR – Onboarding**.
   c. Click **Create**.
2. Add an activity to obtain the applicant's name.
   a. On the left under **Activities**, click and drag **Retrieve Metadata** to the flow designer window and place it between the Start and Stop icons.
   b. Click the three dots for **Retrieve Metadata** and select **Properties**.
   c. Click the **Items** tab.
      i. Click the **Collection** dropdown and click the checkbox next to **All** to deselect all collections.
      ii. Select the checkbox next to **Employment Applications**.
   d. Click **OK** to close the Retrieve Metadata - Properties window.
3. Add an activity to create a folder based on the applicant's name.
   a. On the left under **Activities**, click and drag **Create Folders** to the Flow Designer window and place it below **Retrieve Metadata**.
   b. Click the three dots for **Create Folders** and select **Properties**.
   c. Click the **General** tab.
      i. Replace the default text for **Name** with **Create Applicant Folder**.
   d. Click the **Folder Information** tab.
      i. Click the **Builder** icon for **Folder Name**.
      ii. Click **Applicant Name**.
      iii. Click **OK** to close the Configure Dynamic Value window.
   e. Click the **Parent Folder(s)** tab.
   f. In the **Destination Folder(s)** text box, click the **x** next to **#[FolderIds]**.
   g. In the **Destination Folder(s)** text box, click the **Add Folder** icon.
      i. Click **HR Documents**.
      ii. Click **Active Employees**.
      iii. Click **Add Folder** to close the Select Folder window.
   h. Click the **Permissions** tab.
   i. Click the **Group** button.
      i. Select the checkbox next to the **Human Resources** group.
      ii. Click **OK** to close the Select a group window.
   j. Select the checkbox next to **Folder/File Permissions**.

   k. Click **OK** to close the Create Folders - Properties window.
4. Add an Activity to move the job application.
   a. On the left under **Activities**, click and drag **Copy/Move Files/Folders** to the Flow Designer window and place it below **Create Folders**.
   b. Click the three dots icon for **Copy/Move Files/Folders** and select **Properties.**
   c. Click the **General** tab.
      i. For **Name**, replace the default text with **Move Application to Active Employees Folder**.
   d. Click the **Files/Folders** tab.
      i. For **Destination Folder**, click the **Builder** icon.
         1. Click **Last Created Folder ID**.
         2. Click **OK** to close the Configure Dynamic Value window.
      ii. Click the **Copy Files/Folders** dropdown and select **Move**.
   e. Click **OK** to close the Copy/Move Files/Folders - Properties window.
5. Add and configure a task to sign an employment agreement.
   a. On the left under Activities, click and drag **User Tasks** to the **Flow Designer** window and place it below **Move Application to Active Employees Folder**.
   b. Click the three dots for **User Tasks** and select **Properties**.
   c. Rename the Activity.
      i. Click the **General** tab.
      ii. For **Name**, replace **User Tasks** with **Sign Employment Agreement**.
   d. Assign the task administrator.
      i. Click the **Administrators** tab.
      ii. Click the **Group** button.
         1. Select the checkbox next to the **Administrators** group.
         2. Click **OK** to close the Select a Group window.
   e. Add instructions for the new employee to sign the employment agreement.
      i. Click the **Instructions** tab.
      ii. Click in the text editor and **type or paste the following**:
      Please read the following employment agreement and select "I acknowledge I have read and agree to these terms" below: https://cdn.digitechsystems.com/wp-content/uploads/Sample-Employment-Contract-Agreement.pdf
      In the text editor, select the URL: **https://cdn.digitechsystems.com/wp-content/uploads/Sample-Employment-Contract-Agreement.pdf**
      iii. Click the **Link** icon in the menu.
      iv. Click **Save** on the **Enter Link** text box.
   f. Configure the notification for task participants.
      i. Click the **Notifications** tab.
      ii. For **Subject**, type or paste the following: **An employment agreement requires your signature.**
      iii. In the **Text Editor,** type or paste the following**: Please review the employment agreement**.

iv. Hit **Enter** on the keyboard to move to the next line.
v. At the bottom of the text editor, click **Start Task** to add a start button to the email.

g. Select participants to review the application.
i. Click the **Participants** tab.
ii. Click the **User** button.
1. Select the **checkbox** next to **your name**.
2. Click **OK** to close the Select an Item Window.

Note: For a real Human Resources scenario, you would need to create a Sys.tm account for the new employee and select that account from the Add User window. For the sake of testing the Flow, you will select your own Sys.tm account.

h. Create a checkbox indicating the new employee read and agrees to the terms of the employment agreement.
i. Click the **Selections** tab.
ii. Create the checkbox.
1. Click the **plus sign** next to **Description**.
2. For **Name**, type **Employment Agreement**.
3. For **Property Bag Name**, type **Agreed**.
4. For **Description**, type or paste the following: **I acknowledge I have read and agree to these terms.**.
5. Click **Create** to close the Create Selection window.

i. Click **OK** to close the properties window.

6. **Save** your progress, but **do not Publish**.
7. Create a User Task for HR – Start Payroll & Benefits.

a. Duplicate the previous User Tasks activity.
i. Click the three dots for **Sign Employment Agreement** and select **Copy**.
ii. Click the three dots for **Sign Employment Agreement** and click **Paste Below**.

b. Click the three dots for **User Tasks** and select **Properties**.

c. Rename the Activity
i. Click the **General** tab.
ii. For **Name**, replace **User Tasks** with **HR Notification**.

d. Add instructions for Human Resources to start payroll and benefits.
i. Click the **Instructions** tab.
ii. Remove the text in the text editor box and copy or paste the following: **This email is to inform you that <employee> has begun employment with the company. Please proceed with the necessary actions to start payroll and benefits. Let me know if any additional information is needed.**

e. Replace <employee> with the applicant's name.
i. Delete the word **<employee>** from the paragraph in the text editor.
ii. Click the **Variables** button.
iii. Click **Applicant Name**.

NOTE: The final paragraph should look like this:
This email is to inform you that @[Metadata/Applicant Name] has begun employ ment with the company. Please proceed with the necessary actions to start payroll and benefits. Let me know if any additional information is needed.

f. Configure the notification for task participants.
   i. Click the **Notifications** tab.
   ii. For **Subject**, edit the text to match the following: **Action required: Start Payroll and Benefits**.
   iii. In the **Text Editor,** delete the text, then copy or paste the following**:** **Please start payroll and benefits for new employee**
   iv. Place a space after the word **employee**, then click the **Variables** button.
   v. Click **Applicant Name**.
   vi. Hit **Enter** on the keyboard to move to the next line.
   vii. Click the **Start Task** button.
g. Create a checkbox indicating that HR has begun payroll and benefits for the new employee.
   i. Click the **Selections** tab.
   ii. Edit the existing checkbox.
      1. Click the three dots next to **Agreed** and select **Edit**.
      2. For **Name**, replace **Employment Agreement** with **Started Payroll/Benefits**.
      3. For **Property Bag Name**, type **Started Payroll/Benefits**.
      4. For **Description**, delete the existing text, then copy or paste the following: **Payroll and benefits have been started for this employee.**.
      5. Click **Save** to close the Edit Selection window.
h. Click **OK** to close the User Tasks - Properties window.

8. Create a User Task for IT – Setup System Access and Equipment.
   a. Duplicate the previous User Tasks activity.
      i. Click the three dots for **HR Notification** and select **Copy**.
      ii. Click the three dots for **HR Notification** and select **Paste Below**.
   b. Click the three dots for **User Tasks** and select **Properties**.
   c. Rename the Activity
      i. Click the **General** tab.
      ii. For **Name**, replace **User Tasks** with **IT Notification**.
   d. Add instructions for IT.
      i. Click the **Instructions** tab.
      ii. Click in the text editor box and edit the text to match the following: **This email is to inform you that @[Metadata/Applicant Name] has begun employment with the company. Please proceed with the necessary actions to set up equipment and system access. Let me know if any additional information is needed.**
   e. Configure the notification for task participants.
      i. Click the **Notifications** tab.

ii. For **Subject**, edit the text to match the following: **Action required: Set up system access**.
iii. In the **Text Editor**, edit the text to match the following**: Please set up system access and equipment for new employee @[Metadata/Applicant Name].**
iv. Leave **~[StartButton]** below the text.

f. Create a checkbox indicating that IT has setup system access and equipment for the new employee.
   i. Click the **Selections** tab.
   ii. Edit the existing checkbox.
      1. Click the three dots for the existing checkbox and select **Edit**.
      2. For **Name**, replace **Agreed** with **Setup System Access & Equipment**.
      3. For **Property Bag Name**, replace the existing text with **ITSetup**.
      4. For **Description**, replace the existing text with the following: **System access and equipment have been set up for this employee.**
      5. Click **Save** to close the Edit Selection window.

g. Click **OK** to close the Properties window.

9. Set Employee Status to Active.
   a. On the left under Activities, click and drag **Set Metadata** to the Flow Designer window and place it under **IT Notification**.
      i. Click the three dots for **Set Metadata** and select **Properties**.
   b. Click the **Mapping** tab.
   c. Set the Metadata Collection.
      i. Click the dropdown for **Metadata Collection** and select **Employment Applications**.
   d. Configure the Employee Status value.
      i. Click the **Source** dropdown for **Employee Status** and select **Dynamic Value**.
      ii. In the **Configuration Dynamic Value** textbox, type **Active**.
      iii. Click **OK**.
10. Save and Publish the HR – Onboarding Flow.
   a. Click the **Save** icon in the top right of the Flow Designer window.
   b. In the popup window asking if you would like to save and publish the Flow, click **Yes**.
   c. An additional popup window will appear, asking "Your flow definition is not currently enabled, meaning no new instances will be created. Do you want to enable it now?". Click **Yes**.

Testing the HR – Onboarding Flow:

1. Return to the dashboard.
2. On the Dashboard under **Features**, click **Files**.
3. Navigate to your **HR – Employment Applications** folder.
4. Select the checkbox for **Holly-Halford-Job-Application.pdf**.
5. On the right, click **Start Flows**.
   a. Select the checkbox for **HR – Onboarding Flow**.

   b. Click **Start**.

6. Check your email for the **Sign Employment Agreement, HR** and **IT notification emails.** Complete the tasks as instructed. It may take a few minutes for them to arrive in your inbox.