

Functional Overview: Automated Employee Onboarding & Offboarding System

This document outlines the functional design for streamlining and managing the employee lifecycle through ServiceNow, ensuring a standardized approach to onboarding and offboarding.

1. Request Variables

To ensure accurate processing and asset management, the following variables are captured during the submission process:

- **Request Type:** A choice field to specify if the request is for **Onboarding** or **Offboarding**.
- **Employee ID:** A unique identifier for the employee being processed.
- **Department:** Defines the organizational unit, used for routing departmental tasks.
- **Joining/Exit Date:** Captures the effective start date for new hires or the final working day for departures.
- **Manager:** Identifies the reporting manager responsible for the employee.
- **Assets:** A list of physical hardware (e.g., laptop, mobile, monitor) required for onboarding or to be collected during offboarding.
- **Access Details:** Specific software, folders, or system permissions required for the role.

2. Approval & Task Workflows

The system utilizes dynamic workflows to ensure authorization and operational readiness.

- **Manager Approval:** All onboarding and offboarding requests are routed to the designated Manager to confirm the request's validity.
- **Departmental Task Assignment:** Upon manager approval, the system automatically generates and assigns tasks to relevant departments (e.g., IT for hardware, Facilities for desk placement, HR for documentation).

3. Lifecycle Tracking

To maintain transparency and audit readiness, all request data is centralized:

- **Employee Lifecycle Table:** A dedicated table that stores the comprehensive history of each request.
- **Status Updates:** Provides real-time tracking of the request's progress (e.g., Pending Approval, Fulfillment in Progress, Completed).

4. Functional Process Flow

1. **Request Submission:** User submits the Onboarding/Offboarding form with all required variables.
2. **Manager Evaluation:** The workflow triggers an approval notification to the manager.
3. **Automated Task Creation:** Once approved, departmental tasks are auto-assigned based on the "Department" and "Access Details" variables.
4. **Lifecycle Logging:** The request is logged in the **Employee Lifecycle Table** for continuous tracking.
5. **Fulfillment & Closure:** Tasks are completed, assets are assigned/recovered, and the request is marked as closed.

5. Key Benefits

- **Centralized Governance:** All lifecycle events are recorded in a single table for easy auditing.
- **Operational Efficiency:** Automated task assignment reduces manual coordination efforts.
- **Improved Accuracy:** Structured variables ensure that assets and access are correctly managed from day one.