



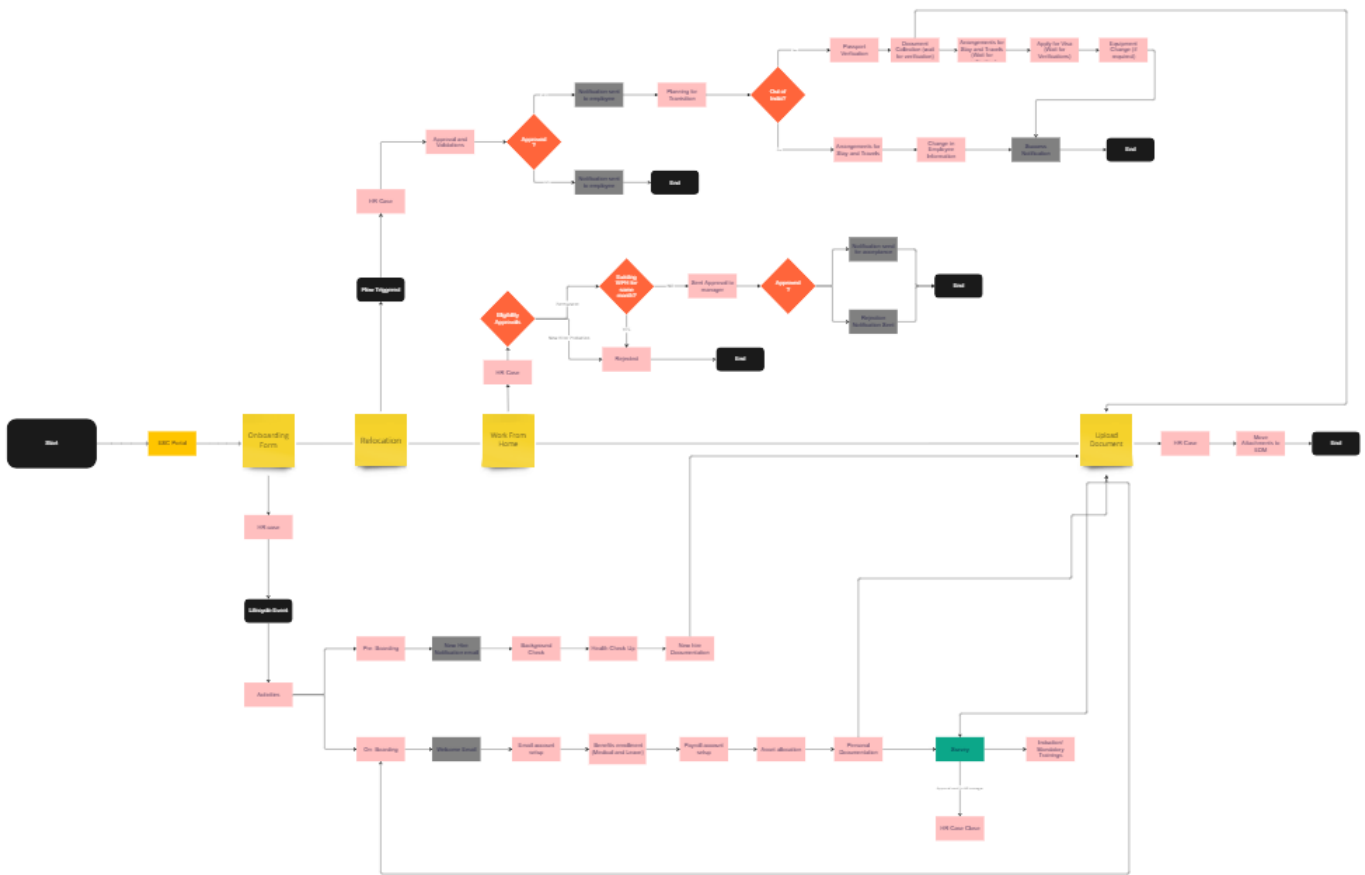
Solution Design Document

Our Objective: To provide an effective end-to-end application that will help HR in managing the On-Boarding, Relocation and Work from Home processes.

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Date: September 2023

Process Flow



For this project, we created some Record Producers for on-boarding, relocation, work from home, and upload documents and developed their respected flows using flow and lifecycle events.

In Work From Home we also added some extra validations, such as person can only requests work from home for that are allowed to him and a monthly reset for the balance.

We used Lifecycle events for the pre-boarding and on-boarding flows and for relocation we triggered distinct flows based on country.

Finally all flows require document submission. we send a notification with redirection link and after submission it automatically move documents to EDM.


For Employee On-Boarding

Record Producer for Employee On-Boarding HR Service

[Back](#)


Employee On-Boarding

Request an OnBoarding for New Hire




First Name

Date of Birth



Middle Name

Email




Last Name


Mobile No

Employee Information


Employment Start Date




Title




Employment Type




Department




Location type




Manager




Company Location



 Add attachments

Submit



Employee On-Boarding

Request an OnBoarding for New Hire

Employment Start Date



Title



Employment Type



Department



Location type



Manager



Company Location



 Add attachments

Submit

After submitting the Request for Employee On-Boarding. Request case number will get generated with proper details.

The case created will look like this:

dev170041.service-now.com/sn_hr_le_case.do?sys_id=0a489149976531102fb4f1e3f153af9b&sysparm_record_target=sn_hr_core_case&sysparm_record_row=...

HR Lifecycle Events Case

HRC0001844

Follow Update Associate Interaction Cancel Delete

System Administrator, HR has requested some actions on your part. [Click here to respond.](#)

Pre-Boarding
1/4

Number: HRC0001844

* Opened for: System Administrator

Subject person: System Administrator

* HR service: Employee OnBoarding

Skills:

State: Ready

* Priority: 4 - Low

Source: Self Service

Opened: 2023-09-25 23:58:01

Opened by: System Administrator

Assignment group: HR

Assigned to:

Collaborators:

Case support team:

Watch list:

* Short description: Employee OnBoarding case for System Administrator

The HR case created will be associated with the tasks as well.

Tasks								1 to 3 of 3	
	Number ▲	Priority	State	Assigned to	Short description	Task type	Activity set	Created	
✖	HRT0001019	4 - Low	Ready	System Administrator	New Hire Documentation	HR Task	Pre-Boarding	2023-09-25 23:58:04	
✖	HRT0001020	4 - Low	Ready	(empty)	Background Check	HR Task	Pre-Boarding	2023-09-25 23:58:04	
✖ ⓘ	HRT0001021	4 - Low	Ready	System Administrator	Health Checkup	HR Task	Pre-Boarding	2023-09-25 23:58:04	
+	Insert a new row...								

Here is the Lifecycle event for the Employee ON-Boarding HR Service.

Manage Lifecycle Event

On-Boarding Form

Switch to Classic UI Update Clone Lifecycle Event Delete Next

Lifecycle Event Activity Sets

* Title: On-Boarding Form Active: ☒

Description:

Display activity sets to subject person: ☐ In the employee view, sort activities by: Due date

Event type: HR Services

Switch to Classic UI Update Clone Lifecycle Event Delete Next

Here are the activity sets and activities for the Employee on Boarding HR Service.

Lifecycle Event

Activity Sets

Add New ▾Enable Rescind🔍☰

Pre-Boarding

Trigger: Immediate

Display order: 100

New Hire Notification

Welcome Email

Notification

Background Check

HR Task

Background Check

HR

Fulfiller

Health Checkup

Mark When Complete

HR

Fulfiller

Health Checkup

Mark When Complete

Employee

New Hire Documentat...

HR Task

New Hire Documentation

IT

Fulfiller

Health Checkup

Mark When Complete

HR

Fulfiller

Health Checkup

Mark When Complete

Employee

New Hire Documentat...

HR Task

New Hire Documentation

IT

Fulfiller

+ Add Activity

On Boarding

Trigger: After Pre-Boarding

Display order: 200

Welcome Email

Welcome Email

Notification

Email Account Setup

Mark When Complete

Employee

Benefit Enrollment

Mark When Complete

Employee

Payroll Account Setup

Mark When Complete

Employee

Asset Allocation

Mark When Complete

Employee

Personal Documentati...

Submit Catalog Item

Employee

Survey

Take Survey

Employee

Induction/Mandatory ...

HR Task

Induction/Mandatory Training

HR

Fulfiller

+ Add Activity

Here are the Notifications triggered during the Case resolution of Employee on boarding.

<

≡

Email welcome

Update

Delete

↑

↓

Type

send-ready

Target

HR Lifecycle Events Case: HRC

User

Notification type

SMTP

UID

N/A

Created

2023-09-25 23:58:18

Deleted

☐

Weight

0

Importance

Originating Event and Notification

1 to 1 of 1

—

Event	Notification
sn_hr_le.notification_activity	Lifecycle Activity Notification

Subject

welcome

Recipients

</>

admin@example.com

Body

</>

—

+

<html><head></head><body><p></p><p>Welcome</p><p></p><div> </div><div style="display:inline">Ref:MSG0008273_kC6AZYSyDRe2FaEKJCPk</div></body></html>

Mail preview:



When all the 3 tasks (Background check, Health Checkup & New Hire Documentation) a new Welcome Email is triggered.

Email welcome

UpdateDelete

Type: send-ready

Target: HR Lifecycle Events Case: HRC

User:

Notification type: SMTP

UID: N/A

Created: 2023-09-25 23:58:18

Deleted: ☐

Weight: 0

Importance:

Originating Event and Notification

1 to 1 of 1

Event	Notification
sn_hr_le.notification_activity	Lifecycle Activity Notification

Subject: welcome

Recipients: admin@example.com

Body: <html><head></head><body><p></p><p>Welcome</p><p></p><div> </div><div style="display:inline">Ref:MSG0008273_kC6AZYSyDR2FaEKJCPk</div></body></html>


Mail Preview:



After completion of some more tasks. A task for Upload Document Created for Subject Person.

Upload Documents

Upload Your Documents




Service:

-- None --

☐ Want Reimbursement

Submit


 Add attachments

And at end a survey is triggered


Survey for case resolution

Take this short survey to give us feedback

* Are You Satisfied with The whole Process?



[Give Your suggestion for improvement](#)

Non-Anonymous 


Submit

For Employee Relocation

Record Producer for Employee Relocation HR Service

Relocation Assistance

Request Relocation Assistance



* Indicates required

* Relocation reason

-- None --

To which office are you relocating?

Address

* Anticipated relocation date

YYYY-MM-DD

Will you require a work visa?


-- None --

City

State / Province

Zip / Postal code

Country


 Add attachments

Submit

Required information

Relocation reason

Anticipated relocation date



City

State / Province

Zip / Postal code

Country

 Add attachments

Submit

Required information

Relocation reason

Anticipated relocation date

After submitting the Request for Relocation. Request case number will get generated with proper details.

The case created will look like this:

HR Workforce Administration Case

HRC0001845

Discuss

Follow

Update

Associate Interaction

Cancel

Delete

Number

HRC0001845

Document Name

Relocation reason

Promotion

* Opened for

System Administrator

Subject person

System Administrator

* HR service

Request Relocation Assistance

Skills

State

Ready

Approval

Requested

* Priority

3 - Moderate

Source

Self Ser

Just now

Opened

2023-09-26 00:55:08

Opened by

System Administrator

Assignment group

HR Tier 1

Assigned to

Roger Seid

Collaborators

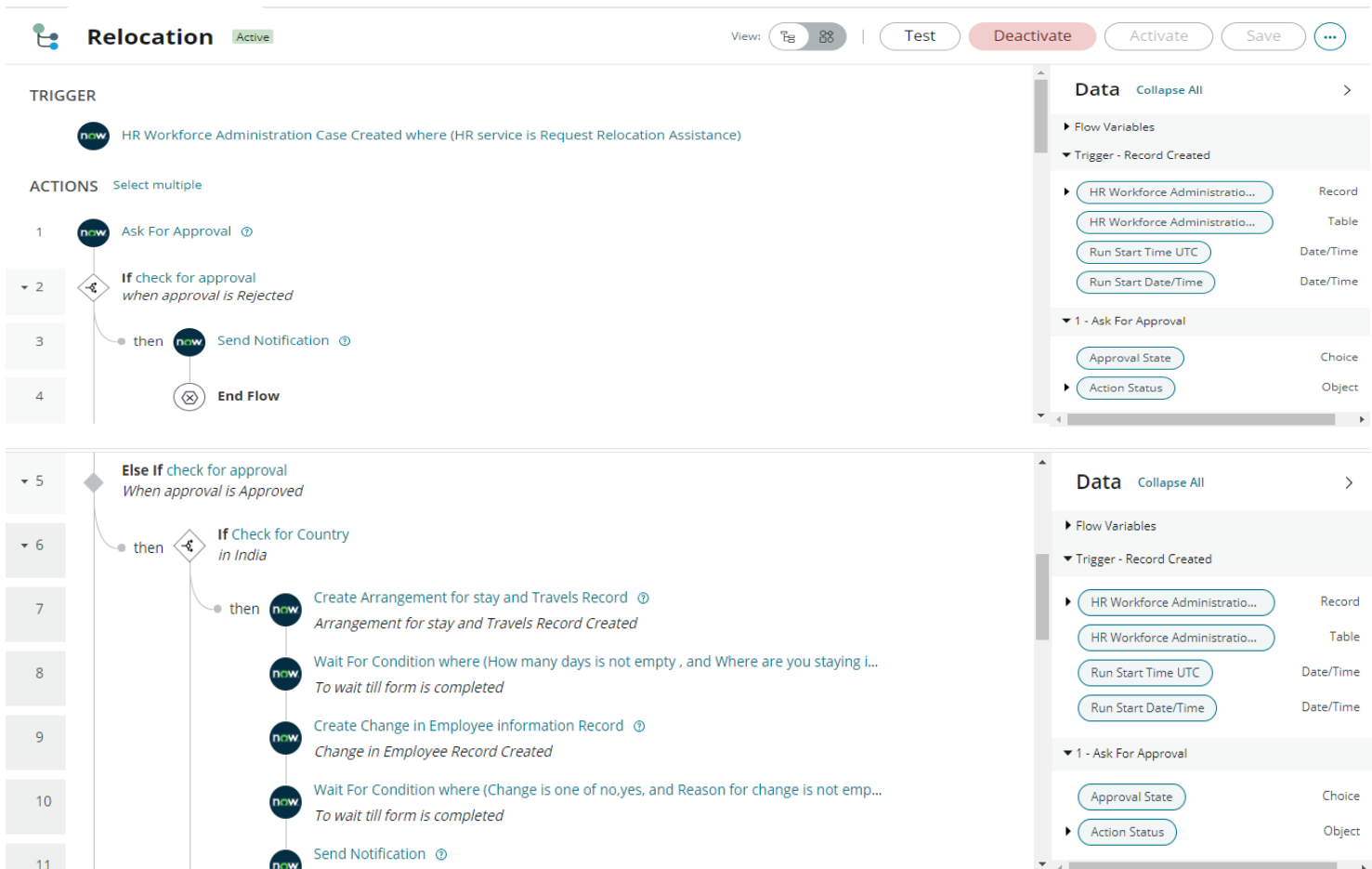
Watch list

Relocation country

Number

HRP0000104

Here is the Flow for the Relocation HR Service.



Data

Collapse All

>

Flow Variables

Trigger - Record Created

HR Workforce Administratio...

Record

HR Workforce Administratio...

Table

Run Start Time UTC

Date/Time

Run Start Date/Time

Date/Time

1 - Ask For Approval

Approval State

Choice

Action Status

Object

Data

Collapse All

>

Flow Variables

Trigger - Record Created

HR Workforce Administratio...

Record

HR Workforce Administratio...

Table

Run Start Time UTC

Date/Time

Run Start Date/Time

Date/Time

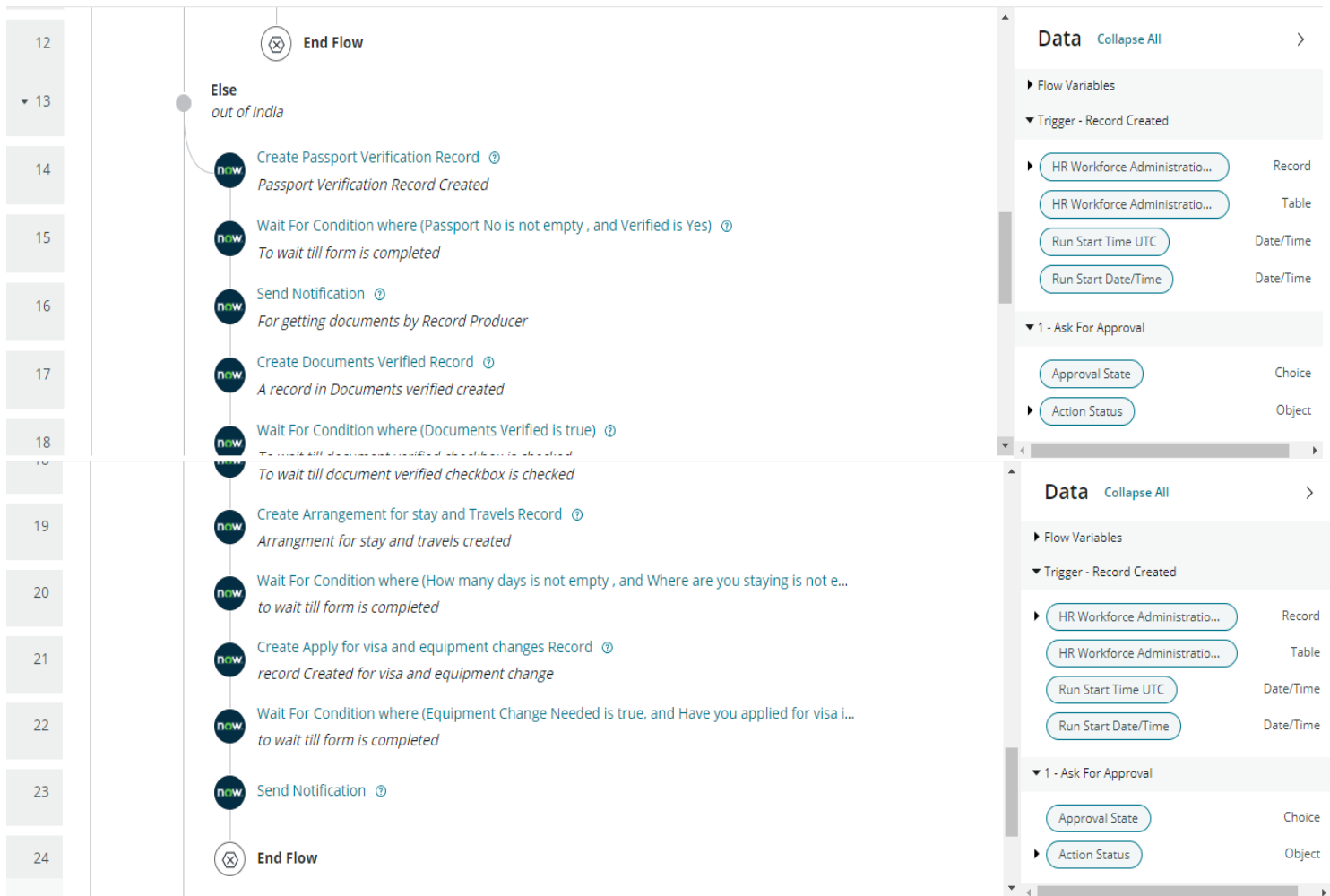
1 - Ask For Approval

Approval State

Choice

Action Status

Object



Finally all flows require document submission. we send a notification with redirection link redirecting to upload Document Record Producer.

Dear Eric Schroeder,

I hope this message finds you well. As part of our ongoing efforts to maintain accurate records and ensure compliance with company policies, we kindly request that you submit the following required documents at your earliest convenience:

To streamline the document submission process, we have set up a secure online portal for your convenience. Please click on the link below to access the portal and upload the requested documents.

click below:

[Click Here](#)

If you encounter any technical difficulties or have any questions regarding the submission process, please do not hesitate to reach out to our HR department .

We understand that your time is valuable, and we appreciate your prompt attention to this matter. Your cooperation in submitting these documents is crucial for maintaining the accuracy and completeness of our records.

Your timely response will help us ensure that our records remain up-to-date and compliant.

Thank you for your cooperation, and please let us know if you require any assistance or have any questions.

Sincerely,


Mail Script for Redirection to Upload Document:

```
Script
1 <function runMailScript( /* GlideRecord */ current, /* TemplatePrinter */ template,
2   /* Optional EmailOutbound */
3   email, /* Optional GlideRecord */ email_action,
4   /* Optional GlideRecord */
5   event) {
6
7   var sysId = "e9f9a0d3974135102fb4f1e3f153af6d";
8
9   template.print('<a style="background-color:blue;color:white;width:100%;height:100%;text-decoration:none;" href="' + gs.getProperty("glide.
servlet.uri") + "esc?id=sc_cat_item&sys_id=" + sysId + ">Click Here</a>');
10
11 }>(current, template, email, email_action, event);
```

After Clicking on click Here button in mail it will Redirect to Upload Document Record Producer

Upload Document

Please upload the specific documents for Relocation or Onboarding



Service

-- None --

Add attachments

Submit

At end a final Successful Relocation Notification is triggered

Body

Dear Eric Schroeder

I hope this message finds you in good health and high spirits. I am pleased to inform you that the relocation process has been successfully completed.

Your transition to the new location was a collaborative effort, and I would like to extend my gratitude to all the teams involved in ensuring a smooth and efficient process.

We understand that relocating can be a significant change, and we are here to support you in settling into your new environment.

Once again, congratulations on this milestone, and we are excited to have you as part of our team in. We look forward to your continued contributions to the company.

Warm regards,

Eric Schroeder

ACME North America

For Work From Home

Record Producer for Work from Home HR Service

Apply for Work from Home

Form for submitting for Work from Home Request

WORK FROM HOME

* Indicates required

From Date

2023-09-26

To Date

2023-09-26

* Manager

Ottillie Galindo

* Reason

Add attachments

Submit

Required information

Reason

After submitting the Request for Relocation. Request case number will get generated with proper details.

The case created will look like this:

HR Workforce Administration Case
HRC0001847

Number: HRC0001847

* Opened for: System Administrator [Search] [Info]

Subject person: System Administrator [Search] [Info]

* HR service: Apply for Work from Home [Info]

Skills: [Lock]

Document Name: [Text Field]

State: Ready [Dropdown]

* Priority: 3 - Moderate [Dropdown]

Source: Self Service [Dropdown]

Opened: 2023-09-26 02:59:20 [Calendar]

Opened by: System Administrator [Text Field]

Assignment group: HR Tier 1 [Search] [Info]

Assigned to: Warren Speech [Search] [Info]

Collaborators: [Lock] [Add]

Watch list: [Lock] [Add]

Relocation country: [Text Field] [Search]

Number: HRP0000104

Total WFH: 4

Balance WFH: 3

* Short description: Apply for Work from Home case for System Administrator [Info]

Description [Icon] <>

[B] [I] [U] [Undo] [Redo] Verdana 8pt [Font Size] [Bold] [Italic] [Underline] [List] [Link] [Image] [Video] [Fullscreen] [Exit Fullscreen] [Align Left] [Align Center] [Align Right] [Justify] [Indent] [Outdent] [Decrease Indent] [Increase Indent] [Decrease Margin] [Increase Margin] [Reset] [Help]

Validations

1.Scheduled Job for Monthly Reset of balance:

Scheduled Script Execution
to autofill leaves and wfh

Application Human Resources: Core

Conditional ☐











For scheduled job types that require an entered time, you have the option to enter an associated time zone. If no time zone is selected, the job will run at the entered time in time zone of the user who entered the time. If 'Use System Time Zone' is selected, the entered time will run in the time zone of the instance running the job.

Run Monthly

Day 1

Time zone -- None --

Time Hours 00 00 00

Run this script          

```
1 var gr=new GlideRecord('sn_hr_core_profile');
2 gr.query();
3 while(gr.next())
4 {
5     gr.u_total_leaves=4;
6     gr.u_wfh=4;
7     gr.update();
8 }
```

2.Restrict User from selecting past date:

```
1 function onChange(control, oldValue, newValue, isLoading) {
2     if (isLoading || newValue == '') {
3         return;
4     }
5     var currentDate = new Date(oldValue);
6     var endDate = new Date(newValue);
7
8     var daysDiff = Math.ceil((endDate - currentDate) / (1000 * 60 * 60 * 24));
9     if (daysDiff < 0) {
10         alert("Don't select past date");
11         g_form.clearValue('u_from_date');
12         g_form.setValue('u_from_date',currentDate);
13     }
14 }
```

3.Restricting user from selecting more than 4 days of Work from Home:

```
function onChange(control, oldValue, newValue, isLoading) {
    if (isLoading || newValue == '') {
        return;
    }

    var startDate = new Date(g_form.getValue('u_from_date'));
    var endDate = new Date(newValue);

    var daysDiff = Math.ceil((endDate - startDate) / (1000 * 60 * 60 * 24));
    if (daysDiff > 4) {
        g_form.clearValue('u_to_date');
        g_form.showFieldMsg('u_to_date', 'More then 4 days of WFH is not accepted.', 'error');
        var setTimer = '';
        setTimer = setTimeout(setTimerDelay, 2000);

        function setTimerDelay() {
            g_form.setValue('u to date', oldValue);
        }
    }
}
```

4.For Populating balance on Portal from HR Service

Catalog Client Script:

```
function onLoad() {  
    var sysID=g_user.userID;  
    var ga=new GlideAjax('sn_hr_core.populateBalance');  
    ga.addParam('sysparm_name','balance');  
    ga.addParam('sysparm_sysID',sysID);  
  
    ga.getXML(callbackfunction);  
  
    function callbackfunction(response)  
    {  
        var answer=response.responseXML.documentElement.getAttribute('answer');  
        g_form.setValue('u_wfh',answer);  
    }  
}
```

Script Include:

```
1 var populateBalance = Class.create();  
2 populateBalance.prototype = Object.extend(Object.prototype, {  
3     balance:function()  
4     {  
5         var sysId=this.getParameter('sysparm_sysID');  
6  
7         var gr=new GlideRecord('sn_hr_core_profile');  
8         gr.addQuery('user',sysId);  
9         gr.query();  
10        if(gr.next())  
11        {  
12            var balance=gr.u_wfh;  
13            return balance;  
14        }  
15    },  
16    type: 'populateBalance'  
17 });
```

5.To Subtract taken Work from Home from the balance

Client Script:

```
1 function onSubmit() {  
2     var fromDate = new Date(g_form.getValue('u_from_date'));  
3     var toDate = new Date(g_form.getValue('u_to_date'));  
4     var balance = g_form.getValue('u_wfh');  
5  
6     var daysDiff = Math.ceil((toDate - fromDate) / (1000 * 60 * 60 * 24));  
7     if (daysDiff > balance) {  
8         alert("You don't have the sufficient Balance.");  
9         return false;  
10    } else {  
11        var ga = new GlideAjax('sn_hr_core.leaveKaatdo');  
12        ga.addParam('sysparm_name', 'leave');  
13        ga.addParam('sysparm_dayDiff', daysDiff);  
14        ga.addParam('sysparm_sysID',g_user.userID);  
15        ga.getXML(callbackFunction);  
16  
17        function callbackFunction(response) {  
18            var answer = response.responseXML.documentElement.getAttribute('answer');  
19        }  
20    }  
21 }  
22  
23 }
```

Script Include:

```

1 var leaveKaatdo = Class.create();
2 leaveKaatdo.prototype = Object.extend(Object(global.AbstractAjaxProcessor, {
3     leave:function()
4     {
5         var dayDiff=this.getParameter('sysparm_dayDiff');
6         var sysID=this.getParameter('sysparm_sysID');
7         var gr=new GlideRecord('sn_hr_core_profile');
8         gr.addQuery('user',sysID);
9         gr.query();
10        if(gr.next())
11        {
12            var atLast= Math.ceil(gr.u_wfh - dayDiff);
13            gr.u_wfh=String(atLast).split('.')[0];
14            gr.update();
15            return atLast;
16        }
17    },
18    type: 'leaveKaatdo'
19  });
20 });

```

6.To Map Total WFH & Balance WFH on HR Profile to fields on HR Case

Specify whether the business rule should run on Insert or Update. Use Filter Conditions to specify under which conditions the business rule should run.

When

Order

Insert ☒

Update ☐

Delete ☐

Query ☐

Filter Conditions

[Add Filter Condition](#)

[Add "OR" Clause](#)

-- choose field --

-- oper --

-- value --

Role conditions



```

1 ✓ (function executeRule(current, previous /*null when async*/) {
2     var sysID=current.subject_person.sys_id;
3     var gr=new GlideRecord('sn_hr_core_profile');
4     gr.addEncodedQuery('user='+sysID);
5     gr.query();
6     if(gr.next())
7     ✓ {
8         current.u_total_leaves=gr.u_total_leaves;
9         current.u_wfh=gr.u_wfh;
10        current.update();
11    }
12 }
13
14 })(current, previous);

```

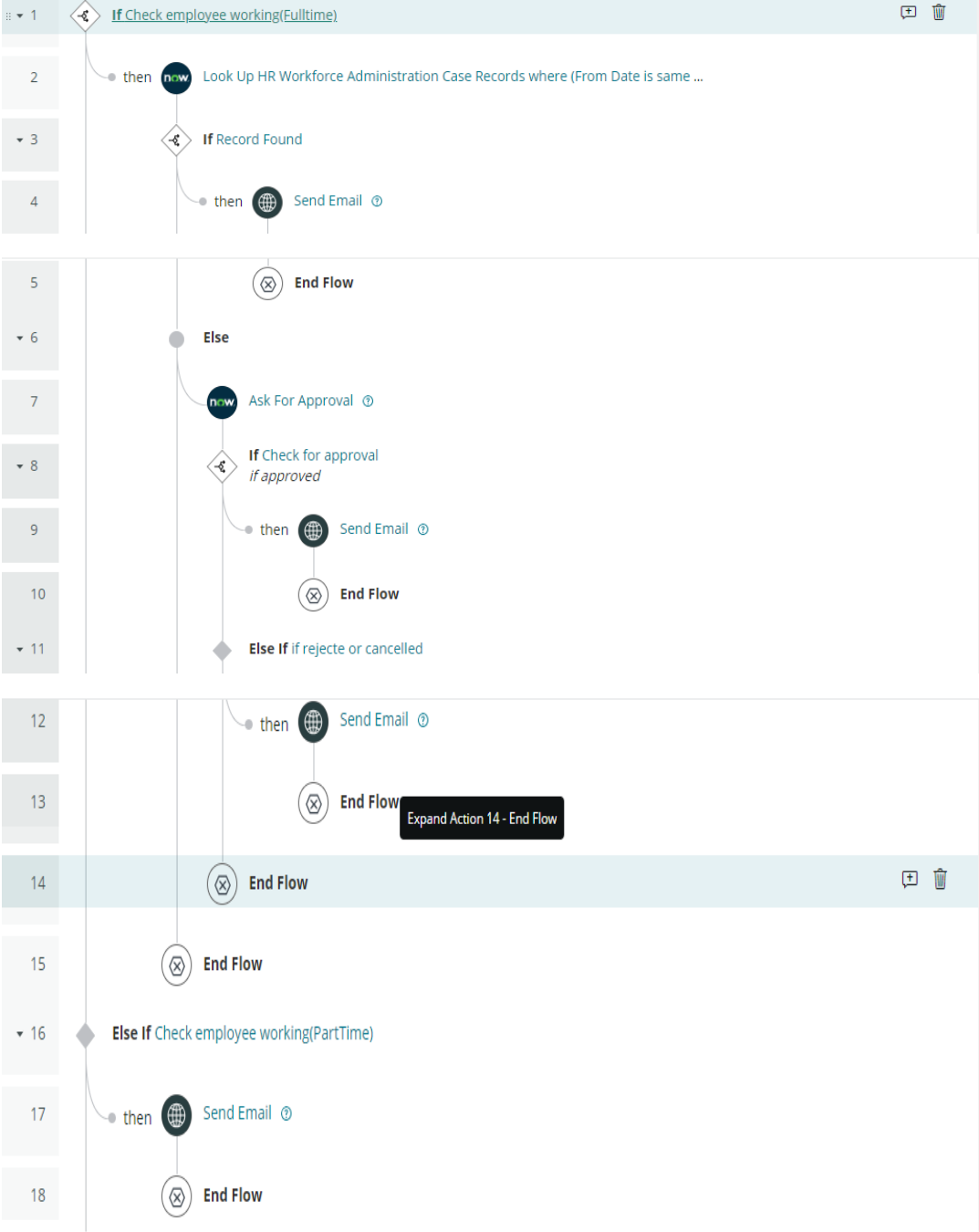
Here is the Flow for the Work From Home HR Service.

TRIGGER

 HR Workforce Administration Case Created where (HR service is Apply for Work from Home)

ACTIONS Select multiple

Expand Action 1 - If



Data Collapse All

Flow Variables	
Trigger - Record Created	
HR Workforce Administrati...	Record
HR Workforce Administrati...	Table
Run Start Time UTC	Date/Time
Run Start Date/Time	Date/Time
1 - If	
2 - Look Up Records	
HR Workforce Administrati...	Records

Data Collapse All

Flow Variables	
Trigger - Record Created	
HR Workforce Administrati...	Record
HR Workforce Administrati...	Table
Run Start Time UTC	Date/Time
Run Start Date/Time	Date/Time
1 - If	
2 - Look Up Records	
HR Workforce Administrati...	Records

Data Collapse All

Flow Variables	
Trigger - Record Created	
HR Workforce Administrati...	Record
HR Workforce Administrati...	Table
Run Start Time UTC	Date/Time
Run Start Date/Time	Date/Time
1 - If	
2 - Look Up Records	
HR Workforce Administrati...	Records

For Upload Document


Record Producer for Upload Document HR Service

1.On Selecting On-Boarding

Upload Document

♡

Please upload the specific documents for Relocation or Onboarding



Service

OnBoarding

Academic Certificates

Upload

Personal Documents

Upload

Photo

Upload


Submit

2.On Selecting Relocation

Upload Document

♡

Please upload the specific documents for Relocation or Onboarding



Service

Relocation

Passport

Upload

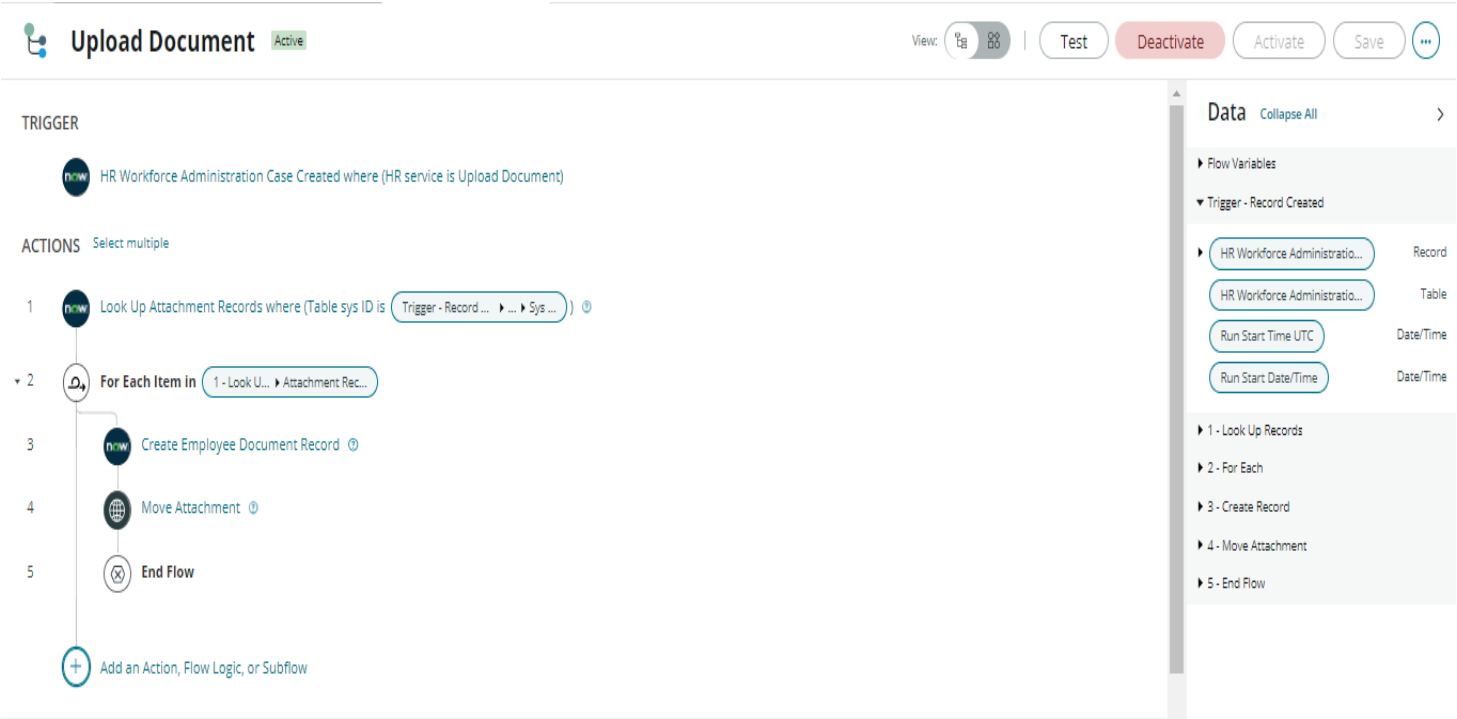
Address Verification

Upload

☐ Want Reimbursement

Submit

Here is the Flow for the Upload Document HR Service. Which will automatically move attachments to EDM.



Data

Collapse All

▶ Flow Variables

▼ Trigger - Record Created

▶ HR Workforce Administratio...

Record

HR Workforce Administratio...

Table

Run Start Time UTC

Date/Time

Run Start Date/Time

Date/Time

▶ 1 - Look Up Records

▶ 2 - For Each

▶ 3 - Create Record

▶ 4 - Move Attachment

▶ 5 - End Flow