

# GSD. General- How to handle incident raised for Offboarding and Retiring user services

**Article ID:** KB0039543

**Created:** 2024-12-19 14:03:14

**Updated:** 2024-12-19 14:03:14

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**Category:** {'link':

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General Information:

Possible symptoms/errors:

Requestor raises incident for Offboarding of a user who is leaving the organization

Alternative names of the system:

Offboarding/OffboardTerminate a userRetire all accessRemove user accessDelete AD and ServiceNow

**IMPORTANT NOTICE:**

For UK & Ireland users, GSD Team must adhere to the article KB0016628 - GSD. Onboarding and Offboarding for UK & Ireland

Solution:

Offboarding Service Portal Form Overview

The User Offboarding request enables the termination of the IT services assigned to an employee who leaves the company.

The User Offboarding request is typically used by team assistants or Manager who want to cancel all user accounts and services for an employee who leaves the company.

However, if the requestor raises an incident for Offboarding of an employee who has left the company, GSD Team must raise the Offboarding request on behalf of the requestor via the ServiceNow IT Service Portal.

Pre-requisite

GSD Team must have access to the following links:

- User Offboarding Catalog- User Master Data- CMDB Configuration Items List

User Offboarding Service Portal Catalog

The Offboarding Form can be found by launching the below

link:[https://fnc.service-now.com/sp?id=sc\\_cat\\_item&sys\\_id=afee58a3db273b0070ad29da4b9619be](https://fnc.service-now.com/sp?id=sc_cat_item&sys_id=afee58a3db273b0070ad29da4b9619be)

IT Services Considered for Retirement

Currently the following services are considered (additional services will be added continually):

Active Directory Account Realtime Collaboration Standard Email Central / Email Web Solution / Email Facility Connection Notes Legacy Services Voice Telephone / Voice to Mail Conference Phone / Polycom Conferencing Services / Multipoint Conferencing Services VPN Access Terminal Server (Citrix) Office 365 applications eFax Secure Web Access Mobile Services (Messaging / Device Management / Mobile Applications) Think Cell Software (Nuance Power PDF, Empower Slides, Camtasia, Client Backup, Efficient Elements, EndNote, Microsoft Project Standard, Microsoft Visio Professional, Microsoft Visio Standard, Microsoft Visual Studio Professional, Mindjet Mindmanager Enterprise, Minitab) Planview services Jira Access and Confluence Access SharePoint User Services

NOTE: The retirement of other user accounts or services like SAP must be requested via E-Mail and processed separately.

In addition, the return of hardware (Notebook, Mobile Phone etc.), company ID card and office keys as well as the return of home office equipment must be processed separately.

For the retirement of the Kabi Access Management services eDMS and LDMS, an official Deactivation request needs to be requested via Service Portal.

Special Retire process for User Access Management Services eDMS and LDMS

For the retirement of the eDMS or LDMS Service, an official Deactivation request needs to be requested via the IT Service Portal.

Therefore, SD must open the eDMS or LDMS Service request on the IT Service Portal and select the "Order for" user. As "Request type" please select "Deactivate User".

If SD is unable to find the user in the "Order for" field, add the requestor's name and then add the correct user in the comment field.

User's job title, department or area of work, organization type, and eDMS application can be found by navigating the CI record of the eDMS application via User Records list view. More information shared in Steps to be followed to gather the required details of that particular service(s) for raising separate request.

User type needs to be determined by the email address of the user.

SD will put the reason for termination as Offboarding and submit the request:

Offboarding Form Fields Overview

Order For

This mandatory field in the form is for adding the email address of the user who is leaving the organization whose services need to be terminated.

Approver

Approver must be the Manager Name of the user leaving the organization. If the requestor while filling the form is having issues and finds the approver is blank, they must confirm and add the Manager for the selected user in "Order for" field by adding the name in the User Manager Update form.

If GSD Team is raising the request on behalf of the requestor, then the team must

- check whether the Manager Name of the leaver is reflecting in the form or not- if the Approver field is blank, then SD team must first verify the same by referring to the Master Data records i.e. by checking the User records table (in order to get the step by step details of verifying the user and services associated with the user account, SD needs to look into Verification of User Manager and Services from User Records Table and CMDB CI List)- if the records suggest the Manager Name to be blank, SD needs to check with the requestor over MS Teams or by email (via Additional Comments) to find the appropriate Approver name/mail address- if the requestor fails to provide the Manager name, SD needs to consult and seek permission from the requestor whether his/her name can be updated as the

Approver- once the information has been collected, attach the screenshot of the confirmation from the requestor and pass the incident to Ext\_WW\_ServiceNow\_SLS\_Capgemini for updating the same- if the requestor fails to provide the Manager name and is not allowing to place his/her own name as the Approver then SD needs to document the list of services(that are still Active) in the WorkNotes and pass the incident to the respective team to retire the active service for the user/users by mentioning the services need to retire for the user/users.

- Concerned teams needs to take action on their side and pass the ticket to the next team for disabling the rest of the services

For service re-assignment, SD may verify the below re-assignment group sheet for reference:

[https://fnc.service-now.com/kb\\_knowledge.do?sys\\_id=e82cc775479c0298d46791cd436d431d&sysparm\\_referring\\_url=kb\\_view.do](https://fnc.service-now.com/kb_knowledge.do?sys_id=e82cc775479c0298d46791cd436d431d&sysparm_referring_url=kb_view.do) - Once all the SLS Team performs the above action, they will pass the ticket back to GSD queue for proceeding further with the Offboarding request.

#### Date Of Service Termination

The field Date of service termination defines the date when the services for the selected employee shall be cancelled/deactivated.It is recommend to select this date 7 days after the leaver's termination date.

If GSD Team is raising the request on behalf of the requestor, then the team must first check with the requestor whether the user has already left the organization or is yet to leave.

If the user has already left, then GSD will proceed with the form as per the process, but for the latter SD team will not proceed with the retirement of services since the user is still present in the organization and Offboarding request in advance will not be processed and has to be communicated to the user through proper channel. SD Team must connect the requestor over MS Teams in case they raise an incident for offboarding the services of the user.

#### Service Overview

The Service Overview on the request form lists all services which can be terminated for the selected employee using the User Offboarding Request.

To cross verify whether all the services are getting captured in the Offboarding form, SD Team needs to follow the steps as mentioned in Verification of User Manager and Services from User Records Table and CMDB CI List.

#### Verification of User Manager and Services from User Records Table and CMDB CI List

Steps to be followed to identify user Manager:

Step 1: Launch the user table "sys\_user" via below link which will be a list view:[https://fnc.service-now.com/sys\\_user\\_list.do?sysparm\\_clear\\_stack=true&sysparm\\_userpref\\_module=555aed3fc0a8016600657c7b0ddc6e97&sysparm\\_view=advanced](https://fnc.service-now.com/sys_user_list.do?sysparm_clear_stack=true&sysparm_userpref_module=555aed3fc0a8016600657c7b0ddc6e97&sysparm_view=advanced)

Step 2: To identify a single user, provide the email address of the user in the UserID field and click enter

To identify multiple users, click on Show filter à Choose the Option field as UserID à Select the Operator field as is one of and enter the list of email address of users to be offboarded à Click on Run

Step 3: Check that Active is in True state à Right click on MoreInfo beside the UserID and select "Open link in new tab"

Step 4: Go to the other tab wherein the user record will be available in form view and check the Manager field

Steps to be followed to identify and retire the user services:

Step 1: Check the user is active in ServiceNow "sys\_user" user table via below user table link:[https://fn.c.service-now.com/sys\\_user\\_list.do?sysparm\\_clear\\_stack=true&sysparm;\\_userpref\\_module=555aed3fc0a8016600657c7b0ddc6e97&sysparm;\\_view=advanced](https://fn.c.service-now.com/sys_user_list.do?sysparm_clear_stack=true&sysparm;_userpref_module=555aed3fc0a8016600657c7b0ddc6e97&sysparm;_view=advanced)

Step 2: Open the user record in form view and navigate to the Configuration Items in the related list and check the user services