

# **Employee Lifecycle Management Process**

VERSION: 1.1

Tuesday, October 24, 2023

### Purpose:

This document will guide you through employee lifecycle management process. IT requires five business days once this form is completed to fulfill request.

### Procedure:

#### Employee Lifecycle Management

The employee lifecycle management process is managed via the IT portal. The following processes may require some level of input from the employee's manager.

Process	Description
Employee Onboarding	A new employee joining the company.
Employee Change	An employee change that may require input from the manager.
Employee Offboarding	An employee leaving the company.

### Process Notifications

A notification will be sent to the employee's manager when input is required for an employee transaction.

You may access the IT Portal from the email you received, or by clicking on this link: [IT Service Portal](#).

As noted in the section "Viewing my Tickets," all employee transaction records will be displayed in the "My Tickets" section on the home page with the title "**Requires Completion**".



Simply click on the number to see the list of records to manage.

## Working with Employee Transactions

The ITSM portal is integrated with Workday and employee lifecycle management tickets will be automatically generated and require the manager to complete them. The following record areas are important to note when working with employee transactions.

Ref	Ticket Data	Description
1	Transaction Type	The type of employee transaction. Generated by Workday
2	Employee Information	Information about the employee. Generated by Workday
3	Edit Mode	Button to click to make changes / modifications to record. The manager can make changes in this section
4	Navigation	Navigation action to page through information.
5	Completion Section	The information required for managers to complete / review.

Edit Save Cancel Refresh Delete Attach (0) Record 1 of 6 Current Record List Grid

### Ticket | 121300 | Pending Customer Completion

Account Management | Employee Onboarding 1

Recipient of this Request:  
Peter Hope

Click To Edit Record 3

Start Date: 1/1/0001  
End Date: 4/28/2023  
Work Type:  
Time Type:  
Employment Type: 2  
Management Level:  
Title:  
Position:  
Supervisory Organization:  
Report To Manager:

#### Onboarding Details 5

We need your assistance in onboarding . Their start date is 1/1/0001. Click on the 'Next' button to specify IT Equipment and Application Access requirements.

1 2 3 4

Next

#### Office / Workstation Assignment Details

Action	Notes
Pass Card and Photo	

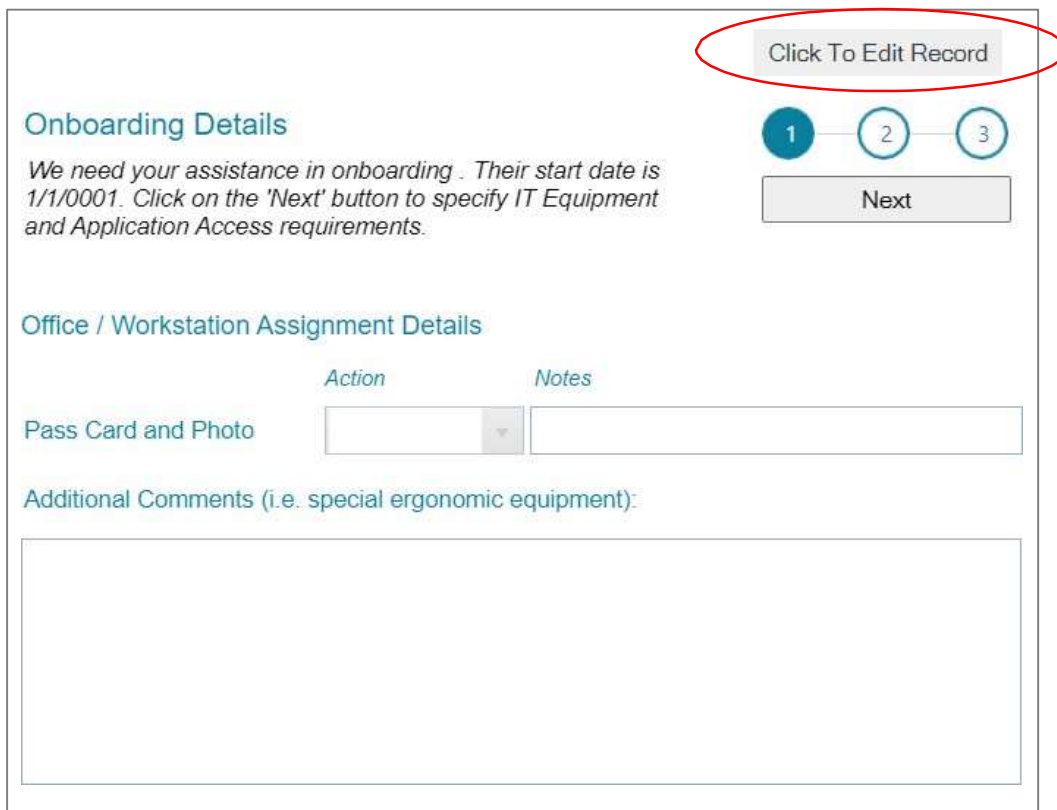
Additional Comments (i.e. special ergonomic equipment):

## Employee Onboarding

When a new employee joins the organization, the hiring manager will have to provide information needed to provision hardware, software and general services.

The following information must be entered when completing an Employee Onboarding request.

As a reminder, you must select “**Click to Edit Record**” to make changes.



The screenshot shows a web form for 'Employee Onboarding'. At the top right, a button labeled 'Click To Edit Record' is circled in red. Below this is a progress indicator with three steps: 1 (active), 2, and 3. A 'Next' button is located below the progress indicator. The form contains two main sections: 'Onboarding Details' and 'Office / Workstation Assignment Details'. The 'Onboarding Details' section includes a text area with instructions: 'We need your assistance in onboarding . Their start date is 1/1/0001. Click on the 'Next' button to specify IT Equipment and Application Access requirements.' The 'Office / Workstation Assignment Details' section has a table with two columns: 'Action' and 'Notes'. The first row is labeled 'Pass Card and Photo' and has a dropdown menu under 'Action' and a text input field under 'Notes'. Below this is a section for 'Additional Comments (i.e. special ergonomic equipment):' with a large text area.

Action	Notes
Pass Card and Photo	

## Pass Card and Photo Assignment

Select the action “**Add**” to specify if the new employee requires the item. Additional notes can be entered next to each item.

Submit (if complete)

Save

### Onboarding Details

*We need your assistance in onboarding . Their start date is 1/1/0001. Click on the 'Next' button to specify IT Equipment and Application Access requirements.*

1

2

3

Next

### Office / Workstation Assignment Details

	Action	Notes
Pass Card and Photo	<div>Add</div>	

Additional Comments (i.e. special ergonomic equipment):

## IT Equipment

Select the IT equipment required for the new employee. Once the action “**Add**” is selected, you can specify types, quantities, and other details about the item.

Submit (if complete)

Save

### IT Equipment Details

Please specify the IT equipment that is applicable for this new hire. The default settings represent the standard package (laptop, keyboard and mouse, monitor and docking station).

1

2

3

Previous

Next

	Action	Type / Qty / Notes
Computer	Add ▼	Laptop ▼
Monitor	Add ▼	1 <input type="text"/>
Keyboard and Mouse	Add ▼	<input type="text"/>
Docking Station	Add ▼	<input type="text"/>
Headset	<input type="text"/> ▼	<input type="text"/> ▼
Softphone Communicator	<input type="text"/> ▼	<input type="text"/>
Mobile Phone	Add ▼	<input type="text"/> ▼

Mobile Approver Required (Director and above)

≡ Q ↗

## Application Access

When you specify the application(s) the new employee requires, you can either select a user to “Copy all access, permissions and applications from:”, or specify each software application. To select an application, highlight it in the list of “Available Applications” and select the “Add” button – this will move the application into the “Applications Selected” list.

Additional notes / comments on application access can be provided in the notes section.

Once all information has been entered, select “Submit” – this will complete the Employee Onboarding entry.

Submit (if complete)

Save

Application Access Details

1

2

3

Previous

Select a user to copy access, permissions and applications from or manually specify which non-standard software and application access is applicable for this new hire.

Copy all access, permissions and applications from:

Available Applications

Accpac

Acrobat Professional

Active Directory (AD)

Adjusters Licensing System (ADJLIC)

Adobe Acrobat Pro

Adobe Acrobat Professional DC

Adobe Creative Cloud Suite

Adobe InDesign

Add

Applications Selected

Remove Application

NOTE: Standard Software includes: Microsoft 365 applications including Outlook and Teams, Workday, Softphone, and VPN.

Please specify detailed access if applicable, including URL's, folder names, and read or write permissions for: SharePoint, Shared Folders, Applications including CETS, Shared Outlook Mailboxes, etc.

## Employee Change

You can use the portal to make employee changes that require manager input. The following information will be reviewed, and if necessary updated, by the employee's manager. For each line item you will be able to designate one of the following actions:

- Add
- Change
- Remove

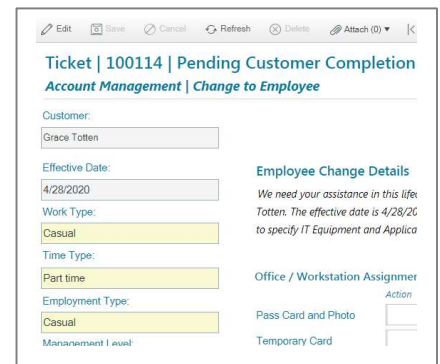
For instance, if the employee no longer requires an office phone, you will select **“Remove”** – if the employee requires a mobile phone in their new position, the manager will select **“Add”** and provide the mobile phone details.

## Identifying What has Changed

When viewing an Employee Change record, you can identify what has changed with the employee by viewing the fields highlighted in yellow.

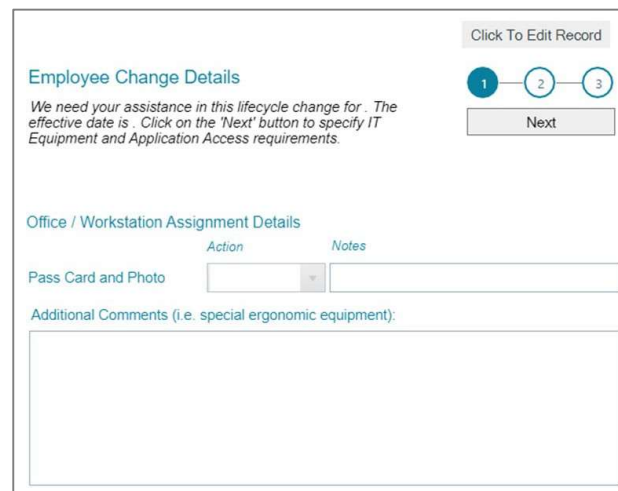
If the employees **“Title”** has changed, then the field will be highlighted in yellow and will display the new title.

This is automatically generated through Workday.



## Updating Passcard and Photo

For each line item, indicate if changes are necessary. If no changes are necessary, you can simply leave the action blank.



Once you have completed the section select **“Next”** to navigate to the next section.



## Updating IT Equipment

For each IT item listed, indicate if a change is necessary. In the example below, the manager is adding a mobile phone for this user.

The IT equipment that is currently assigned to the user is listed in the list box titled “Currently Assigned Hardware”.

Submit (if complete)

Save

IT Equipment Details

1

2

3

Previous

Next

Please identify any equipment needs / changes required as a result of the employee change.

	Action	Type / Qty / Notes
Computer	<input type="text"/>	<input type="text"/>
Monitor	<input type="text"/>	<input type="text"/>
Keyboard and Mouse	<input type="text"/>	<input type="text"/>
Docking Station	<input type="text"/>	<input type="text"/>
Headset	<input type="text"/>	<input type="text"/>
Softphone Communicator	<input type="text"/>	<input type="text"/>
Mobile Phone	Add <input type="text"/>	<input type="text"/>

Mobile Approver Required (Director and above)

Currently Assigned Hardware

## Updating Application Access

The employee may require different application access rights. You can use the “Copy all access, permissions and applications from:” to specify the rights or use the “**Add**” and “**Remove**” actions to select the appropriate applications.

The software list will be “pre-loaded” with employee’s current applications.

Once all information has been entered, select “Submit” to submit the record.

Submit (if complete)

Save

Application Access Details

Select a user to copy access, permissions and applications from or manually specify which non-standard software and application access is applicable for (under this lifecycle change).

Copy all access, permissions and applications from:

Available Applications

Accpac

Acrobat Professional

Active Directory (AD)

Adjusters Licensing System (ADJLIC)

Adobe Acrobat Pro

Adobe Acrobat Professional DC

Adobe Creative Cloud Suite

Adobe InDesign

Add

Applications Selected

Remove Application

NOTE: Standard Software includes: Microsoft 365 applications including Outlook and Teams, Workday, Softphone, and VPN.

Please specify detailed access if applicable, including URL's, folder names, and read or write permissions for: SharePoint, Shared Folders, Applications including CETS, Shared Outlook Mailboxes, etc.

## Employee Offboarding

When an employee leaves the organization, you must complete an employee offboarding request. The offboarding request provides the manager with an opportunity to provide special instructions regarding the employee's departure.

Please click Start/Edit Record button to review and add special instructions to the ticket .e.g. specifying the employee name in the Transfer files/emails to section

FSRA

Home All Records

Edit

Save

Cancel

Refresh

Delete

Attach (0)

<

>

Record 1 of 1

<|

>|

Current Record

List

Grid

Ticket | 156175 | Pending Customer Completion

Account Management | Employee Offboarding

Recipient of this Request:

Maliyah Rahemtulla

Start/Edit Record

Departure Date

8/31/2023

Work Type:

Student (Fixed Term)

Time Type:

Full time

Employment Type:

9 AMAPCEO

Management Level:

9 AMAPCEO

Title:

Actuarial Co-op

Position:

P000387 Actuarial Co-op (Position  
Fill: 05/08/2023 Maliyah Rahemtulla)

Supervisory Organization:

Actuarial Services (Lester Wong)

Report To Manager:

Lester Wong

Offboarding Details

The effective date is 8/31/2023. Click "Start/Edit Record" to fill out the form.

Office / Workstation Assignment Details

☐ Please immediately revoke building/badge access

IT Equipment / Services Details

Below is a list of assets assigned to the employee. It is the Manager's responsibility to ensure that all equipment that is not being used at 25 Sheppard is returned prior to their last day.

Item	Serial Number	Description
Monitor-3734	VNA8M47H	ThinkVision T23i-20 - Type 61F6
Laptop-797	R90WVSLT	Lenovo ThinkPad X1 Yoga 3rd

Transfer files / emails to:











Additional comments (i.e. Sharepoint, Shared Drive Access)

The "IT Equipment/ Services Details" section display all assets currently assigned to the user and expected to be returned on their last day

Then Click "**Submit (if complete)**" to submit record

**FSRA**

Home All Records

 Save  Cancel  Refresh  Delete  Attach (0)  <  > Record 1 of 1  Current Record  List  Grid

**Ticket | 156175 | Pending Customer Completion**  
*Account Management | Employee Offboarding*

**Recipient of this Request:**  
Maliyah Rahemtulla

**Departure Date**  
8/31/2023

**Work Type:**  
Student (Fixed Term)

**Time Type:**  
Full time

**Employment Type:**  
9 AMAPCEO

**Management Level:**  
9 AMAPCEO

**Title:**  
Actuarial Co-op

**Position:**  
P000387 Actuarial Co-op (Position  
Fill: 05/08/2023, Maliyah Rahemtulla)

**Supervisory Organization:**  
Actuarial Services (Lester Wong)

**Report To Manager:**  
Lester Wong

**Submit (if complete)** **Save Record**

**Offboarding Details**  
*The effective date is 8/31/2023. Click "Start/Edit Record" to fill out the form.*

**Office / Workstation Assignment Details**  
☐ Please immediately revoke building/badge access

**IT Equipment / Services Details**  
Below is a list of assets assigned to the employee. It is the Manager's responsibility to ensure that all equipment that is not being used at 25 Sheppard is returned prior to their last day.

Item	Serial Number	Description
Monitor-3734	VNA8M47H	ThinkVision T23i-20 - Type 61F6
Laptop-797	R90WVSLT	Lenovo ThinkPad X1 Yoga 3rd

**Transfer files / emails to:**

**Additional comments (i.e. Sharepoint, Shared Drive Access)**

## Additional Troubleshooting Information

If you have any questions or concerns, please call the Help Desk at 416-590-7111 or email us at [servicedesk@fsrao.ca](mailto:servicedesk@fsrao.ca)

## Document Revision History and Version

Version	Date	Name	Revision
1.0	10/25/2021	Raphael Monje	Procedure Created
1.1	10/24/2023	Serah Majekodunmi	Procedure Updated