# Automated Employee Onboarding & Offboarding System

## 1. Executive Summary

This solution delivers an end-to-end, fully automated Employee Onboarding and Offboarding system built on **ServiceNow**, designed to streamline employee lifecycle management, reduce manual intervention, and ensure secure, compliant operations across HR, IT, Facilities, and Security teams.

The system leverages **Service Catalog**, **Flow Designer**, **custom tables**, **role-based ACLs**, and **dashboards** to create a scalable, audit-ready, and business-aligned workflow.

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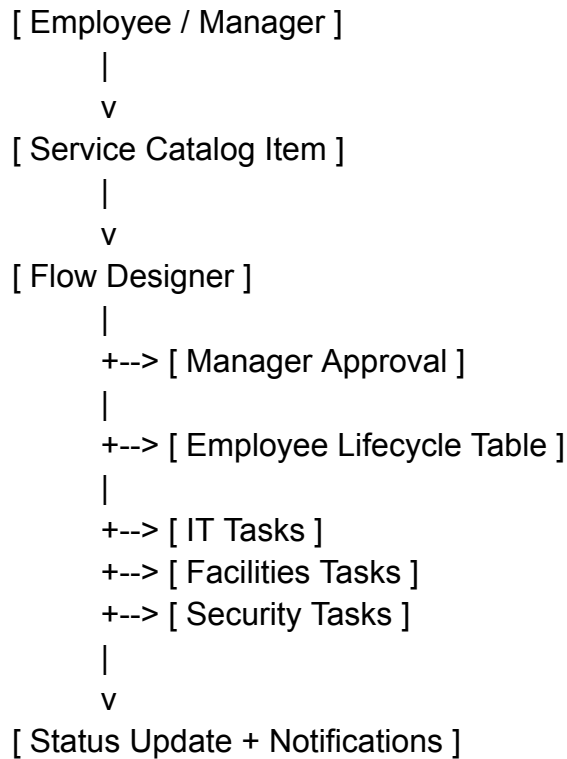## 2. Business Objectives

### 2.1 Strategic Goals

- Digitize and standardize onboarding/offboarding processes
- Improve employee experience with faster turnaround times
- Enable HR and managers through self-service automation
- Ensure security, compliance, and auditability
- Provide actionable insights through reports and dashboards

### 2.2 Business Value

- Reduced operational overhead
- Faster approvals and task fulfillment
- Zero dependency on manual follow-ups
- Improved SLA adherence
- Data-driven HR decision-making

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# 3. System Architecture Overview

## 3.1 High-Level Architecture Diagram

```
[ Employee / Manager ]
        |
        v
[ Service Catalog Item ]
        |
        v
[ Flow Designer ]
        |
        +--> [ Manager Approval ]
        |
        +--> [ Employee Lifecycle Table ]
        |
        +--> [ IT Tasks ]
        +--> [ Facilities Tasks ]
        +--> [ Security Tasks ]
        |
        v
[ Status Update + Notifications ]
```

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# 4. Functional Scope

## 4.1 In-Scope Features

- Onboarding & Offboarding Service Catalog Item
- Dynamic variables and UI policies
- Manager-based approval workflow
- Automated task creation for departments
- Custom Employee Lifecycle table
- Role-based access control (ACLs)
- SLA tracking and reporting

## 4.2 Out-of-Scope

- External HR system integrations

- Payroll or compensation processing

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# 5. Stakeholder Mapping

| Stakeholder | Responsibility |
| --- | --- |
| HR Team | Initiate & track requests, lifecycle ownership |
| Managers | Approvals for onboarding/offboarding |
| IT Team | Account provisioning & deactivation |
| Facilities | Workspace allocation & clearance |
| Security | ID cards & access management |

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# 6. Execution Roadmap (5 Phases)

## Phase 1: Requirement Analysis & Planning

- Business objective alignment
- Scope definition
- Stakeholder identification

## Phase 2: Backend Development & Configuration

- Custom table creation
- Role & group setup
- Flow Designer automation

## Phase 3: UI/UX Development

- Service Catalog item
- Variable configuration
- UI Policies

## Phase 4: Testing & Security

- QA, UAT, SLA validation
- ACL enforcement

- Data integrity checks

## Phase 5: Deployment & Documentation

- Final deployment
- Knowledge transfer
- Stakeholder demo

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# 7. Data Architecture

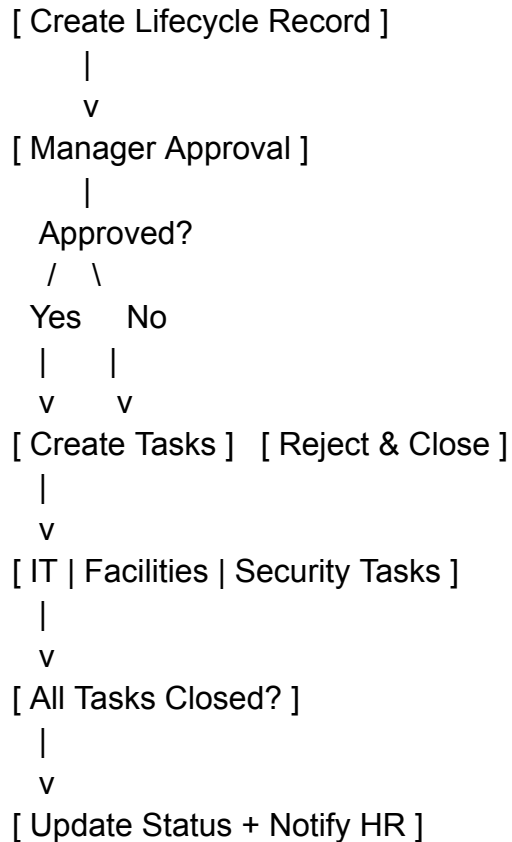## 7.1 Custom Table: Employee Lifecycle (u_employee_lifecycle)

| Field | Type | Description |
|---|---|---|
| Employee ID | String | Unique employee identifier |
| Employee Name | Reference (sys_user) | Employee record |
| Department | Reference (cmn_department) | Employee department |
| Manager | Reference (sys_user) | Reporting manager |
| Joining Date | Date | Onboarding date |
| Exit Date | Date | Offboarding date |
| Request Type | Choice | Onboarding / Offboarding |
| Status | Choice | New, In Progress, Completed |
| RITM | Reference | Linked request item |

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# 8. Automation Logic (Flow Designer)

## 8.1 Onboarding Flow – Process Flowchart

[ Catalog Submission ]
     |
     v

```
[ Create Lifecycle Record ]
       |
       v
[ Manager Approval ]
       |
   Approved?
    /   \
  Yes    No
   |     |
   v     v
[ Create Tasks ]   [ Reject & Close ]
   |
   v
[ IT | Facilities | Security Tasks ]
   |
   v
[ All Tasks Closed? ]
   |
   v
[ Update Status + Notify HR ]
```

## 8.2 Key Automation Features

- Dynamic manager approval
- Parallel task creation
- Date-based SLA calculation
- Automatic closure & notifications

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# 9. UI/UX Design

## 9.1 Service Catalog Item

**Catalog Item:** Onboard / Offboard Employee

## 9.2 Variables

- Request Type (Onboarding / Offboarding)
- Employee ID

- Department
- Manager
- Joining / Exit Date
- Assets Required / To Collect
- Access Instructions

### 9.3 UI Policy Logic

IF Request Type = Onboarding
  → Show Joining Date
  → Hide Exit Date

IF Request Type = Offboarding
  → Show Exit Date
  → Hide Joining Date

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# 10. Security & Access Control

### 10.1 Roles

- hr.manager
- it.admin
- facilities.staff
- security.officer

### 10.2 ACL Strategy

- HR: Full access to lifecycle records
- Managers: Approval-only access
- IT/Facilities/Security: Task-level access only

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# 11. Testing & Quality Assurance

### 11.1 Test Coverage

- Unit Testing: Flow actions
- Integration Testing: Catalog → Flow → Tasks

- UAT: End-to-end onboarding/offboarding

## 11.2 Validation Checklist

- Approval routing
- Task creation
- SLA adherence
- Notifications
- Audit logs

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# 12. Reporting & Dashboards

## Sample Reports

- Onboarding completion time
- Task SLA breaches
- Pending approvals
- Department-wise workload

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# 13. Troubleshooting & Monitoring

- Flow Execution Details for debugging
- Email logs for notification validation
- Variable mapping checks
- UI policy behavior testing

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# 14. Innovation Highlights

- 100% Flow Designer–based automation
- Zero custom scripts for core logic
- Modular, scalable, and admin-friendly design
- Clean separation of responsibilities

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# 15. Conclusion

This Automated Employee Onboarding & Offboarding System delivers a **future-ready, scalable, and secure HR automation framework** aligned with enterprise best practices. It improves operational efficiency, enhances employee experience, and provides leadership with actionable insights—making it a high-impact ServiceNow implementation.