

# Functional Overview

## 1 Purpose

The Functional Overview defines how the Automated Employee Onboarding & Offboarding system operates from a user and process perspective. It explains the key variables, approval logic, task automation, and lifecycle tracking that together ensure a seamless and auditable employee lifecycle.

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## 2 Key Variables

Variable Name	Type	Description
Request Type	Choice	Determines whether the request is Onboarding or Offboarding
Employee ID	String	Unique identifier for the employee
Department	Reference (cmn_department)	Department to which the employee belongs
Joining Date	Date	Applicable only for onboarding requests
Exit Date	Date	Applicable only for offboarding requests
Manager	Reference (sys_user)	The reporting manager is responsible for approval
Assets	Multi-select Choice	Assets to be issued or collected (Laptop, ID Card, etc.)
Access Details	Multi-line Text	Special access requirements or revocations

Table Employee Lifecycle

Delete Update Delete All Records

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

\* Label Employee Lifecycle

Application Global

\* Name u\_employee\_lifecycle

Columns Controls Application Access

Table Columns

for text

Search

1 to 15 of 15

New

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Exit Date	Date	(empty)	40	false	
Created by	String	(empty)	40	false	
Department	Reference	Department	32	false	
RITM	Reference	Requested Item	32	false	
Created	Date/Time	(empty)	40	false	
Sys ID	Sys ID (GUID)	(empty)	32	false	
Updated by	String	(empty)	40	false	
Employee ID	String	(empty)	40	false	
Updates	Integer	(empty)	40	false	
Request type	Choice	(empty)	40	false	
Manager	Reference	User	32	false	
Joining date	Date	(empty)	40	false	
Updated	Date/Time	(empty)	40	false	
Requested for	Reference	User	32	false	
Status	Choice	(empty)	40	false	
Insert a new row...					

Delete Update Delete All Records

Related Links

[Form Builder](#)[Design Form](#)[Layout Form](#)[Layout List](#)[Show Form](#)[Show List](#)[Show Schema Map](#)[Add to Service Catalog](#)[Run Point Scan](#)[Explore REST API](#)

Access Controls (4) Security Data Filters Labels (1) Database Indexes (5) Table Subscription Configuration (1)

Name

Search

Actions on selected rows...

Access Controls

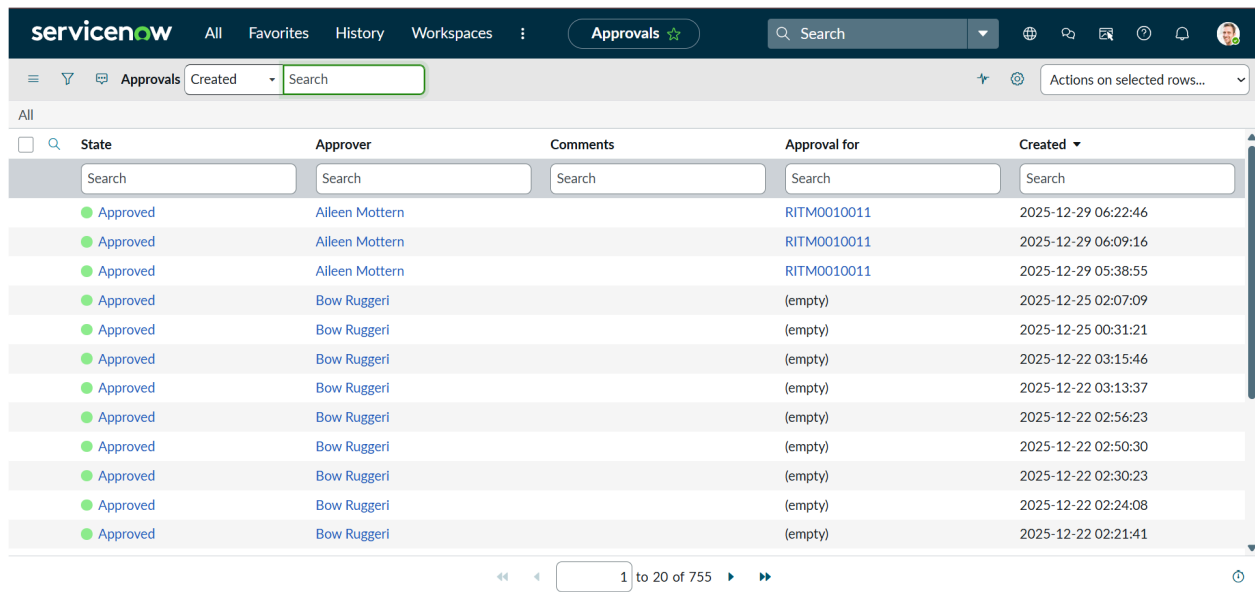
Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_employee_lifecycle	Allow If	read	record	true	admin	2025-12-26 21:54:19
u_employee_lifecycle	Allow If	delete	record	true	admin	2025-12-26 21:54:19
u_employee_lifecycle	Allow If	write	record	true	admin	2025-12-26 21:54:19
u_employee_lifecycle	Allow If	create	record	true	admin	2025-12-26 21:54:19

1 to 4 of 4

### 3 Approval Use Cases

#### Manager Approval (Mandatory)

- All onboarding and offboarding requests require manager approval
- Approval is dynamically assigned based on the selected Manager variable
- Requests cannot proceed until approval is granted

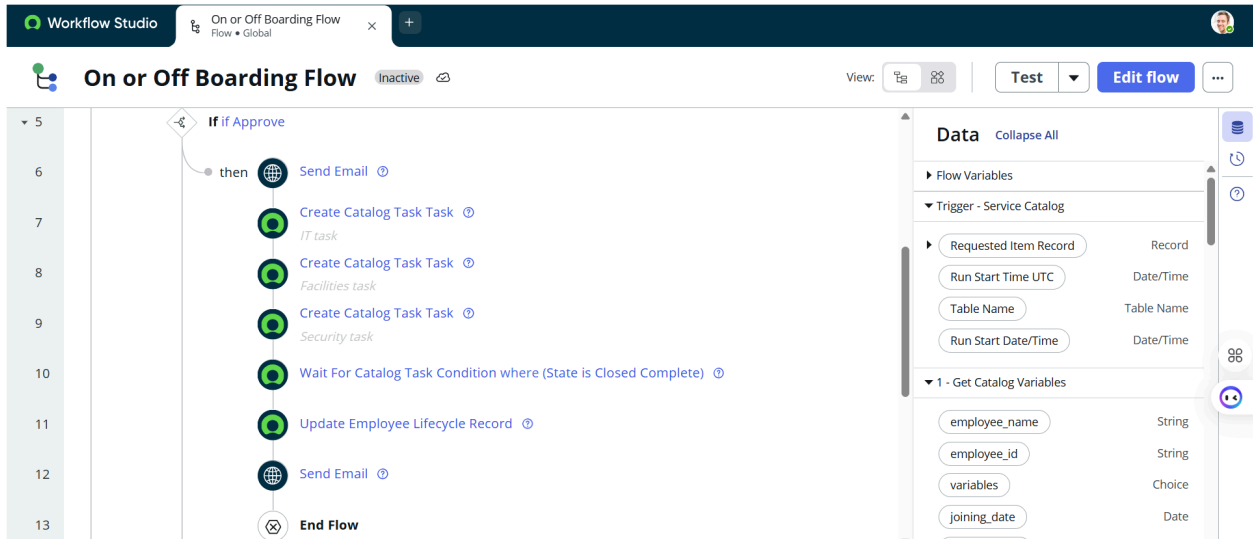


The screenshot shows the ServiceNow 'Approvals' list view. The table displays 13 rows of approved requests. The first three rows are for 'Aileen Mottern' with approval ID 'RITM0010011'. The remaining ten rows are for 'Bow Ruggeri' with an 'empty' approval ID. All requests are in the 'Approved' state. The table includes search filters for State, Approver, Comments, Approval for, and Created. The pagination bar at the bottom indicates '1 to 20 of 755' items.

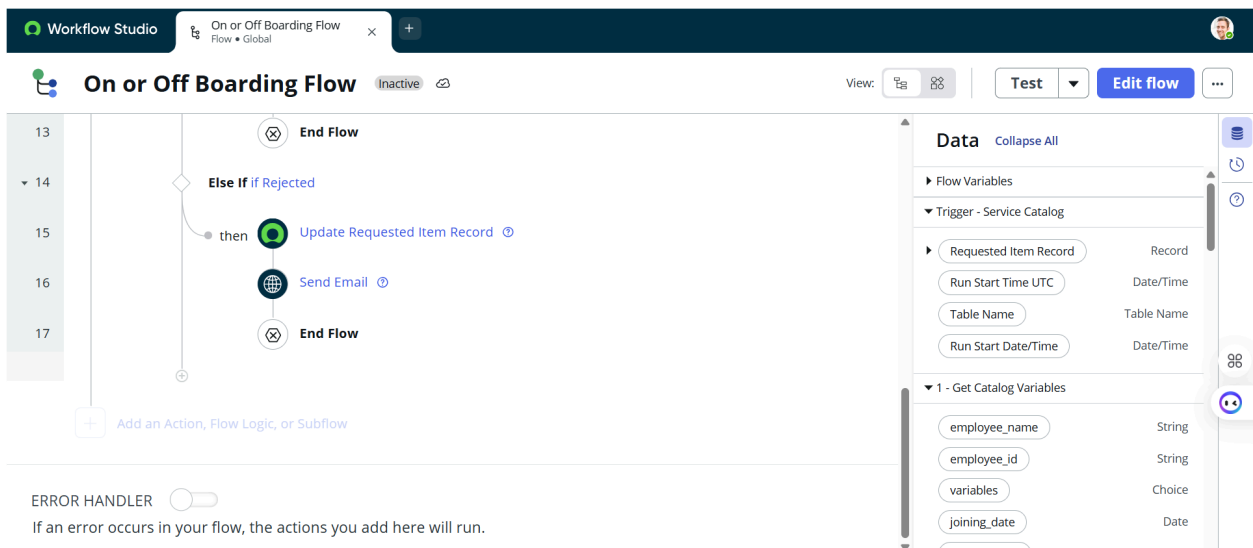
State	Approver	Comments	Approval for	Created
Approved	Aileen Mottern		RITM0010011	2025-12-29 06:22:46
Approved	Aileen Mottern		RITM0010011	2025-12-29 06:09:16
Approved	Aileen Mottern		RITM0010011	2025-12-29 05:38:55
Approved	Bow Ruggeri		(empty)	2025-12-25 02:07:09
Approved	Bow Ruggeri		(empty)	2025-12-25 00:31:21
Approved	Bow Ruggeri		(empty)	2025-12-22 03:15:46
Approved	Bow Ruggeri		(empty)	2025-12-22 03:13:37
Approved	Bow Ruggeri		(empty)	2025-12-22 02:56:23
Approved	Bow Ruggeri		(empty)	2025-12-22 02:50:30
Approved	Bow Ruggeri		(empty)	2025-12-22 02:30:23
Approved	Bow Ruggeri		(empty)	2025-12-22 02:24:08
Approved	Bow Ruggeri		(empty)	2025-12-22 02:21:41

#### Approval Outcomes

- **Approved** → Departmental tasks are auto-generated



- **Rejected** → Request is closed with rejection status and notification



## 4 Task Automation & Assignment

Once approved, tasks are automatically created and routed to the appropriate teams:

**Department**      **Task Description**

HR      Employee lifecycle tracking & coordination

IT	Account creation/deactivation and asset provisioning
Facilities	Workspace setup or clearance
Security	ID card issuance or access revocation

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## 5 Lifecycle Tracking

All requests are tracked in the **Employee Lifecycle (u\_employee\_lifecycle)** table, providing end-to-end visibility.

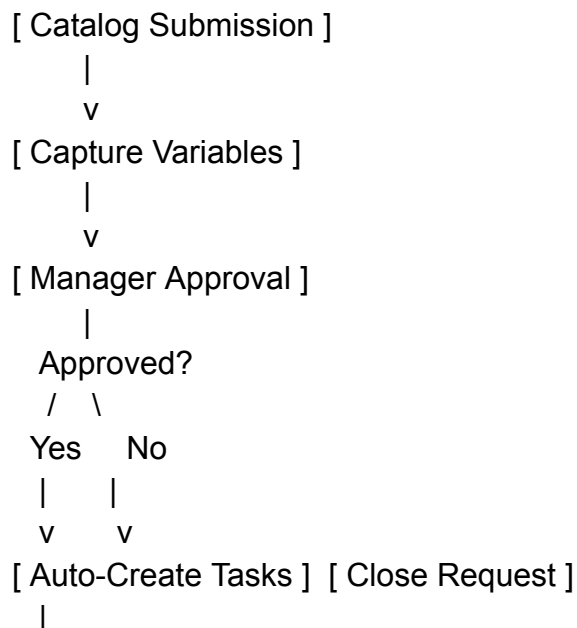
### Status Flow:

- New
- In Progress
- Completed
- Rejected

Each status update is automated through Flow Designer based on approvals and task completion.

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## 6 Functional Flow Diagram



V  
[ Track in Lifecycle Table ]  
|  
V  
[ Update Status & Notify Stakeholders ]

Workflow Studio

On or Off Boarding Flow

Flow • Global

On or Off Boarding Flow

Inactive

View:

Test

Edit flow

TRIGGER

Service Catalog

ACTIONS

1

Get Catalog Variables from on or off Boarding

2

If if Req Type On Bording

3

then

4

Create Employee Lifecycle Record

5

Ask For Approval on Requested Item

6

If if Approve

7

then

8

Send Email

9

Create Catalog Task Task

IT task

10

Create Catalog Task Task

Facilities task

11

Create Catalog Task Task

Security task

12

Wait For Catalog Task Condition where (State is Closed Complete)

13

Update Employee Lifecycle Record

14

Send Email

15

End Flow

16

Else If if Rejected

17

then

18

Update Requested Item Record

19

then

20

Send Email

21

End Flow

+

Add an Action, Flow Logic, or Subflow

Data

Collapse All

Flow Variables

Trigger - Service Catalog

Requested Item Record

Record

Run Start Time UTC

Date/Time

Table Name

Table Name

Run Start Date/Time

Date/Time

1 - Get Catalog Variables

employee\_name

String

employee\_id

String

variables

Choice

joining\_date

Date

request\_time

Choice

Data

Collapse All

requested\_for

Reference

department

Reference

managers

Reference

2 - If

3 - Create Record

Employee Lifecycle Record

Record

Employee Lifecycle Table

Table

Action Status

Object

4 - Ask For Approval

Approval State

Choice

Action Status

Object

14 - Else If

15 - Update Record

Requested Item Record

Record

Requested Item Table

Table

Action Status

Object

16 - Send Email

email

Record

Action Status

Object

17 - End Flow

ERROR HANDLER

If an error occurs in your flow, the actions you add here will run.

Read-only

Status: Published

Application: Global

1

## 7 Business Impact

- Single source of truth for employee lifecycle data
  - Faster turnaround through automated approvals and tasks
  - Reduced errors via conditional variables and validations
  - Improved audit readiness with complete status history
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