ServiceNow
HUIT Onboarding Guide
Entering a request for a New Hire
Introduction

The following internal IT document contains instructions for creating a HUIT Onboarding Request via ServiceNow. Instructions will cover the workflow process for hiring new, contract, temporary, or transfer employees. This document contains step-by-step instructions for filling out the Onboarding Request form.

HUIT Onboarding Process Overview

<table>
<thead>
<tr>
<th>Administrative Operations</th>
<th>Deployment &amp; Field Support</th>
<th>Identity &amp; Access Management</th>
<th>Communication Services</th>
<th>Finance &amp; HR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review &amp; approve onboarding request</td>
<td>Procure equipment</td>
<td>Create account</td>
<td>Grant Concur access</td>
<td></td>
</tr>
<tr>
<td>Review &amp; approve equipment</td>
<td>Prepare hardware &amp; software</td>
<td>Create email address</td>
<td>Grant HCOM &amp; B2P access</td>
<td></td>
</tr>
<tr>
<td>Request building access</td>
<td>Coordinate equipment delivery</td>
<td>Create VPN account</td>
<td>Add to mailing list</td>
<td></td>
</tr>
<tr>
<td>Prepare workspace</td>
<td>Schedule setup with new hire</td>
<td>Assign mailbox &amp; calendar access</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create POI role</td>
<td>Meet with new hire to complete setup</td>
<td>Create Google account</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Submit Harvard Phone request</td>
<td>Set up accounts and access for new hire</td>
<td>Create ServiceNow account</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* Furniture requests will be processed by the Administrative Operations team. The turnaround time for furniture preparations will vary depending on the type of request. New furniture requests typically take 6-8 weeks from order to delivery.

The onboarding process involves the work of several different departments. In order to ensure that your new hire is set up for success on their first day, we ask that you provide 14 days advance notice of their start date.
Instructions for Accessing the Onboarding ServiceNow Form

1. In the web browser of your choice, navigate to ServiceNow.
2. In the top right-hand corner, click “Login.”
3. Log in with your HarvardKey.
4. You should now see a tile for HUIT Onboarding & Offboarding; click there.
5. Click on HUIT Employee Onboarding.

If you are not able to see a category, please contact Administration at HUIT_AdminOps@harvard.edu

Request for New Hire, Transfer, and Temporary Staff

1. General Information
   Before completing the Onboarding Request Form, review the Technology Considerations for New Hires manager guide. This guide outlines steps you will need to take to gather the information you will need to successfully complete the Onboarding Request Form. These items include:

   • Employee Type
   • First and Last Name
   • Onboarding Email Address
   • Onboarding Mobile Phone
   • Onboarding Location Information
   • Job Title
   • HUIT Department
   • Start Date
   • Workspace Location
   • IT Equipment Needs
(*) indicates that the information is required.

You can submit the request without the new 8 Digit HUID number. If this is the case, the Administration team will fill out the information once the new hire HUID number is provisioned.
2. Space

Space

* Select a location where you expect your new employee will be based once on-campus operations resume.

Room/Workstation

Furniture Request

Example: chair, bookcase, whiteboard, etc

* Building Access

Full Time Employee (FTE) will receive standard HUIT clearance. Please review the HUIT Standard Building Access Portfolio from the link above.

FTE (HUIT Standard only)

- Enter the building and space where the new hire will be based.
- If new hire will be working remotely, please select “remote” under space location.
- Existing furniture should be re-purposed. If new furniture is required, please specify the items need in the appropriate field. The Administration team will review the request and if approved, will provide items. Please note, new furniture orders can take up to 8 weeks to process.
- Select the building access the new hire requires.
3. Equipment

**Standard**

* Will this position require a Harvard provided computer?
  - Yes

* Will the new hire be onboarded remotely or on-campus?
  - None --

**Non-Standard**

* Will this position require a Harvard provided computer?
  - Yes

* Will the new hire be onboarded remotely or on-campus?
  - None --

Employee will be issued a HUIT standard Dell laptop. If there is a business case that requires an employee to have a different type of computer, please fill out the Apple and Non-Standard Computer Asset Request Form and return it to HUIT_AdminOps@harvard.edu.

* Computer selection
  - Non-Standard

* Please list the custom computer specifications

Apple and Non-Standard Computer Asset Request Form must be filled out and submitted for approval

**Computer Options**

- Add Additional Accessories
- Non-Standard Software

- If a new hire will require non-standard computer equipment, fill out the required Apple
& Non-Standard Computer Asset Request Form and attach it to the request. An email will be sent to the department Managing Director for approval to purchase non-standard equipment. The request will be on “Pending” status until approval is received.

- If approved, the approval will prompt a new task for the Admin Refresh Team to place the order. New equipment orders can take up to 14 business days to arrive.

4. Create User Account

Accounts & Access

* Create Harvard Email and Calendar

Will the new hire need access to a shared mailbox? Indicate shared mailbox(s) below

Will the new hire need access to a shared calendar? Indicate shared calendar(s) below

* Network Access

Please list the full path for each shared drive, and what level of access is required (read, write). If no network access is required, please enter 'None'

Account Options

- Google Apps Account
- VPN Account
- ServiceNow Account

- Fill out (*) required field(s) for email and calendar requests.

- List all the shared network drives and additional account access the new hire requires. If information is missing after the onboarding process is started, a separate request needs to be submitted to the IT Help Desk
5. Phone

For an Existing Phone line

Harvard Phone
Harvard Phone Line Required?
Yes

* Use Existing Line or Request a New Line?
○ Use Existing  ○ New

Existing Phone Number

- Existing phone number is required.

For A New Line

Harvard Phone
Will the new hire need a Harvard Phone line?
Yes

* Use Existing Line or Request a New Line?
○ Use Existing  ○ New

Service Options

- None --
  Standard: Jabber Softphone
  Non-Standard: Desk Phone

ROPRA Training is required for all financial access

- Fill out (*) required fields for new phone line request.
- Select the service options you would like the new hire to use:
  ○ Standard – Jabber Softphone line
  ○ Non-Standard- Desk Phone
- Desk Phone requests will require the jack number of the physical location where the phone will be located.
6. Finance

**Financial Access**

If the new hire is a budget manager and needs financial access, please select the tools the new hire will need access to.

- HCOM
- Concur

ROPFA Training is required for all financial access.

- Select any financial tools the new hire will need access to.

7. Submit, Confirmation, and View Status

Once the form is filled out, go to the top and click on Submit Request. A REQ number will be generated for your reference. Throughout the process, the Administration team will provide updates status of the tasks. Managers will also be able to check the status through the IT help portal.

A week prior to new hire start date, the Administration team will follow up with hiring manager and update pending status and a field technician will contact the hiring manager to schedule a time to finalize the computer set up.
Request for Contractor, Consultant, and Vendor

1. **General Information**
   Before you can begin to fill out the request for a Contractor, Consultant, and Vendor you must have the following information:

   - Agency
   - Birthday
   - Onboarding email address
   - Onboarding mobile phone
   - Start and End date
   - Statement of Work (SOW) or Contract Agreement

New Hire Information

*Employment Type 🅱

- Contractor

*First Name

*Last Name

*Onboarding Email Address 🆕

Required for use with HarvardKey recovery process

8-Digit HUID 🆕

This information is used to correlate the correct identity in situations where similar names already exist

*Agency

*Date of Birth

*Project

- Project 🟥
- Operational 🟥

*Reporting Manager

Job Title

*HUIT Department

- Academic Technology 🅱

*Estimated Start Date

Contract End Date

Follow instructions 2 through 6 from “Request for New Hire, Transfer, Term, and Temporary Staff”, above.
Onboarding Workflow

Manager

Submit HUIT Onboarding Form

In the request for HUT?

Yes

No

Create PCC and enter HUD on SHIN Form

Deployment, Procure equipment, update All record, and assign to Team

Deploy equipment

Procured

Field: Restore equipment, update All record, and image record. If applicable, update equipment.

Download HRS, manage, and deliver and set up equipment.

Create user ACCOUNTS

- Gmail address
- Drive
- Calendar
- Slack channel
- Microsoft Office

Communicate with new hire:

- Welcome email
- Slack channel
- Phone call
- Meet the team

Communicating with new hire

Add new hire to team channel

Submit HUNT Form

Request space & grant building access

Update internal resources

- Network
- Master List
- Email Plan

HUIT Onboarding – Entering Request for New Hire instructions
Roles and Responsibilities

Hiring Manager

- Enter all required fields on ServiceNow form.
- Provide home address and phone number for new hire working remotely.

HUIT Administration

- Process Owner
  - Oversee the entire onboarding workflow to ensure timely completion of onboarding tasks.
  - Aggregate feedback for improvement to process and submit to the Service Management team for future development.
  - Communicate with hiring managers and onboarding stakeholder.
  - Create and enter the HUID number on the form.

- Item Approval
  - Review and approve all onboarding task request.
    - Approved: Workflow begins – Tasks are created
    - Rejected: Task and workflow are canceled
  - Assigned tasks once the form is submitted.
    - Approved: Workflow begins – Tasks are created
    - Rejected: Item and workflow are canceled

- Space and Logistics Task
  - Receive a task to provision physical equipment (desk, chair, etc.) and building access.
    - Task Short Description: HUIT New Hire – Space
    - After the equipment and building access are complete, update the ticket with the information and "Close Task."
    - Update task, MIDAS, Departmental Space Master, 784 Parking List, and Staff seating master list.

- Account & Access Task
  - Receive a task if the new hire is marked as a Contractor. Check YOH's weekly onboarding spreadsheet for the HUID number and start date. If the vendor is not an approved supplier with YOH, create a POI/HUID for the contractor, enter HUID in the form, and click 'Close Task.'
  - Ensure the statement of work (SOW) or contract agreement is attached.
  - Add the new hire and term email addresses to the listserv.
  - Send "Welcome Tools" communication to new hires and managers outside of the workflow request. Once sent, update the note, and click "Close Task."
  - Send "Donut Program Welcome Email" outside of the workflow request and click 'Close Task.'
  - Send "PAL" communication to new hire outside of the workflow request. Once sent, update the note, and click "Close Task."

- Phone Task
  - Manage the phone process outside of Workflow Request Process. Once the phone portion is complete, update the ticket and click 'Close Task.'
• Equipment Task
  o Review onboarding requests, work with hiring manager on equipment preference and update the information in ServiceNow and click 'Close Task.'
  o Submit an Apple & Non-Standard Computer form signed by Managing Director for non-standard computer request and forward it to Administration.
  o Attached the non-standard form to ServiceNow task for Deployment to order.
  o Confirmed the home address, phone number, onboarding email, and shipping billing code are provided for staff working remotely and click 'Close Task.'

Accounts and Access
• IAM (Identity and Access Management)
  o Once the form has been completed with a valid name and HUID, a task will be generated for the following items:
    ▪ Email Account Creation
    ▪ Mailbox and/or Calendar Access
    ▪ VPN Account and Realm Access
    ▪ Google Account
  o Once Email Accounts, Access, and VPN have been granted, email the hiring manager a confirmation using the ‘Email to Customer’ button and click ‘Close Task.’

• IT Service Management
  o Once the form has been completed with a valid name and HUID, and ‘ServiceNow Account’ option has been checked, a task will be generated to create and delegate ServiceNow access.
  o Once ServiceNow access has been added, email the hiring manager a confirmation using the ‘Email to Customer’ button and click ‘Close Task.’
  o ITSM will add user to ‘HUIT Alert’ list and click ‘Close Task.’

• End User Architecture & Engineering Team
  o Task will be assigned to ESM group to create account for Crimson Print.
  o ESM will add user to Crimson Print and click ‘Close Task.’

Deployment and Field Support
• Task 1: HUIT New Hire - [Step 1: Build + If Remote, Notify & Ship] and [Step 2: Schedule Set Up]
  o Step 1
    In the 1st Step, the task will be assigned to the Deployment/Refresh team to evaluate whether or not equipment needs to be purchased. Once the decision is made, the ticket will be reassigned to the Field group for deployment. The assigned technician will then:
    ▪ Image and prep the machine for deployment. If the new hire is remote, ship the machine to their home address.
    ▪ Update the ‘Field Support Shared Information’ field with the delivery tracking number, shipping date, and user setup information.
    ▪ Email the new hire and manager with the expected delivery date and tracking number.
    ▪ Set expectations that a Field technician will reach out to schedule a time to meet with the new hire on their start date to set up their equipment.
    ▪ Once information is entered, REASSIGN task to proper field support group.
Step 2:
In the 2nd step, Field Support group will assign a field technician to the task. The assigned technician will then:

- Schedule an appointment with the new hire and copy the new hire's manager. The appointment should be scheduled on the new hire's start date.
- Update 'Work Note' with the scheduled date and time.
- Task will remain ON HOLD until the final task is opened after the account provisioning is complete.
- 'Close the task' once the final task, 'Meet New Hire to Finalize Equipment,' is opened.

Task 2: The final task, 'Meet New Hire to Finalize Equipment Set Up,' will open once IAM completes the account provisioning. The assigned technician will then:

- Meet with the new hire on their start date to get them set up.
- Update the user account and machine information, which can be found in the Field Support Shared Information field of the task.
- Once the device has been set up, click 'Close Task.'

Phones
- HUIT Administration
  - Submit phone line requests through the Harvard Phone request portal outside of the HUIT Onboarding form.
  - Update the ticket and click 'Close Task.'

- Communication and Collaboration Services
  - Once the form has been completed with a valid name and HUID, and 'Slack' and/or ‘Zoom’ option has been checked, a task will be generated to the UC Video team to create and assigned collaboration tool access.
  - Once the request is processed, the UC Video team will update the ticket, and click 'Close Task.'

Finance
- Accounting Team
  - Accounting team will email hiring manager the link to the application and arrange training with new hire.
  - Once the request is processed, accounting team will update the task and click 'Close Task.'