



**ManageEngine**  
**ServiceDesk Plus**

# **7 ways ServiceDesk Plus simplifies employee onboarding and offboarding**



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# Introduction

Many organizations struggle to manage employee onboarding and offboarding effectively, not due to a lack of effort, but due to the lack of streamlined and scalable processes.

In fact, these joiner, mover, leaver (JML) processes are critical junctures in an organization's life cycle, as they shape first impressions, impact productivity, and are vital to maintaining security and compliance. Yet, teams operate in silos, hand offs lack clarity, and there's no centralized platform to track responsibilities and progress. This fragmentation leads to new hires starting without the tools they need and former employees retaining access longer than they should.

So, how can organizations break this cycle and make the JML process seamless? The answer lies in a system that automates, coordinates, and monitors every step of the process.

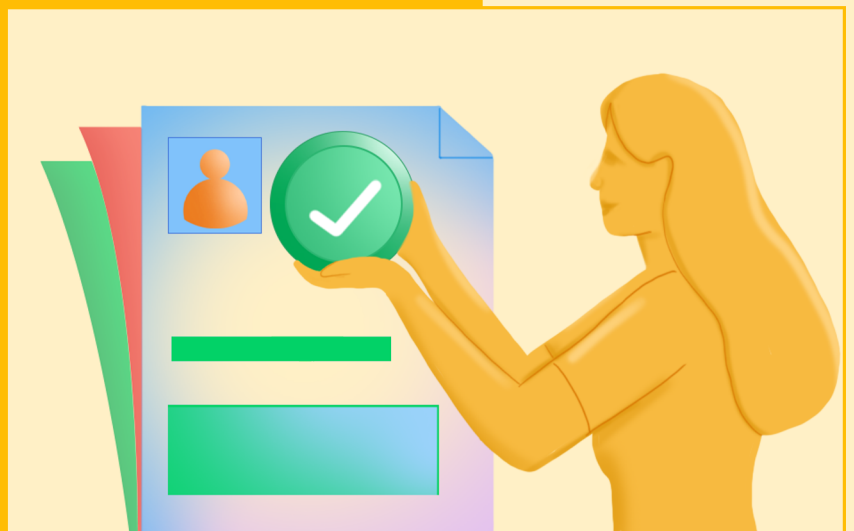
ServiceDesk Plus, ManageEngine's AI-driven, unified service management platform is designed specifically to solve these challenges. By bridging IT service management and enterprise service delivery, ServiceDesk Plus helps organizations deliver consistent, secure, and efficient onboarding and offboarding experiences.

Through this e-book, you'll learn how to leverage ServiceDesk Plus to handle every employee's journey efficiently while ensuring that the organization is not open to any cybersecurity risks surrounding standing privileges.

CHAPTER

# 01

**Onboard and offboard  
consistently without  
reinventing the wheel**



It's important for new hires to start off on the right foot. You need to ensure new employees start their journey with confidence along with an onboarding kit comprising of a workstation, software entitlements, and workplace setup. However, onboarding requests often arrive with missing details or inconsistent formats, leading to delays, confusion, and last-minute scrambles.

Whether you're onboarding one new hire or hundreds, ServiceDesk Plus empowers you to streamline this first step with customizable onboarding request templates that capture every necessary detail upfront. Once ready and published on the self-service portal, these templates will remove ambiguity and bring uniformity, even when onboarding at scale.

## a. Gather detailed employee information with dynamic request templates

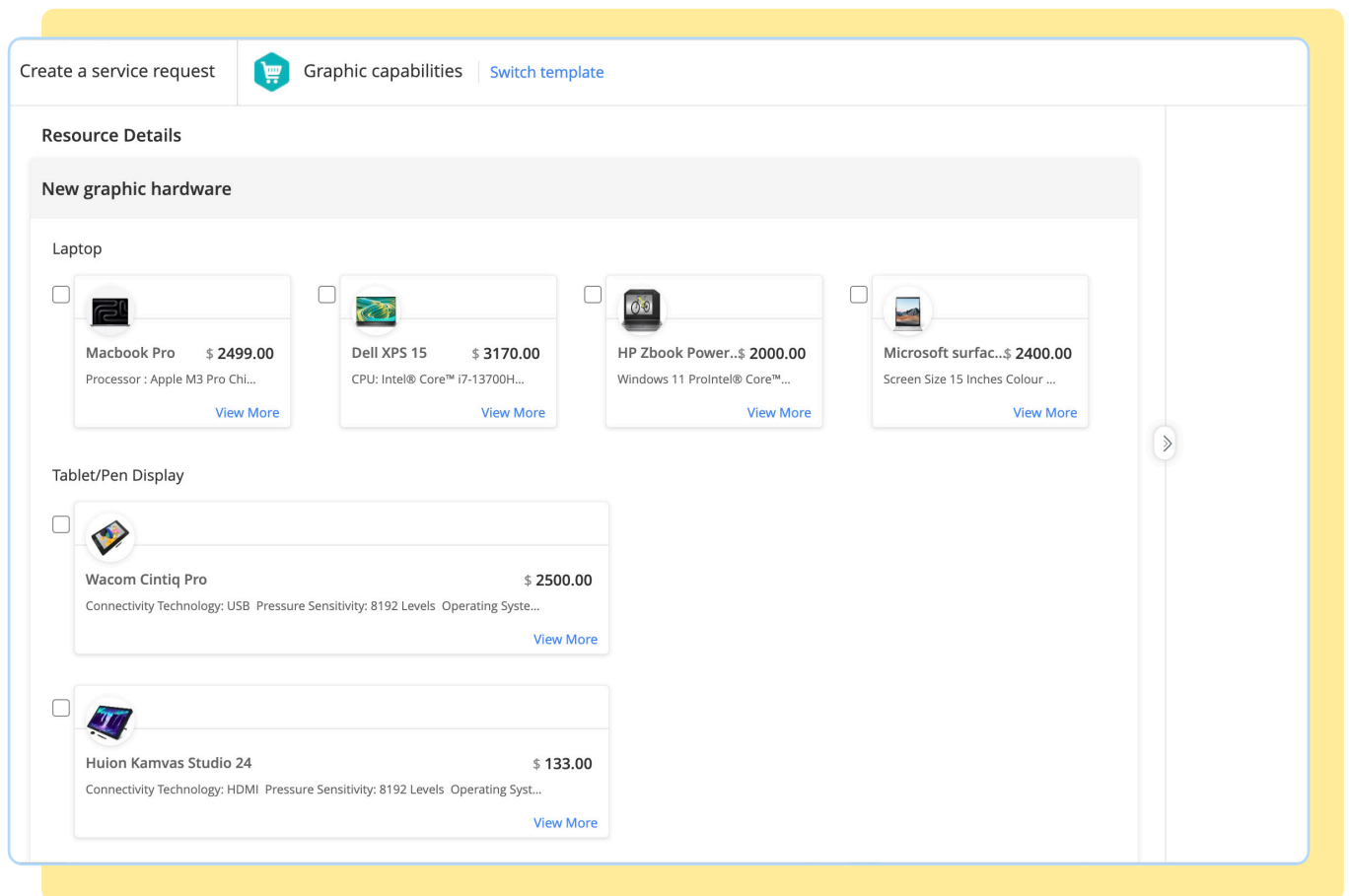
The screenshot displays the 'Edit Service Template' interface for 'Employee onboarding'. The form is divided into several sections:

- Header:** Includes a back arrow, title 'Edit Service Template', and buttons for 'Preview' and 'Actions'.
- Tabs:** 'Technician View' (active), 'Requester View', 'Resource Info', 'Approvals', 'Associated SLAs', 'Tasks', and 'Form Customization'.
- Main Form:**
  - Name:** A text field with 'Employee onboarding' and a 'Change' icon.
  - Comments:** A large text area.
  - Workflow / Life cycle:** A dropdown menu with '-- Select Workflow / Life cycle --'.
  - Requester Details:**
    - \* Requester Name:** A dropdown menu with '-- Select Requester Name --' and a user icon.
    - Status:** A dropdown menu with 'Open'.
    - Phone:** A text field.
    - Department:** A dropdown menu.
    - J...:** A text field.
  - Employee details:**
    - \* First Name:** A text field.
    - \* Last Name:** A text field.
    - \* Full Name:** A text field.
    - Employee ID:** A text field with '<1>' and a warning icon.
    - \* Personal Email ID:** A text field with 'e.g. johndoe@example.com'.
    - Email:** A text field with 'e.g. johndoe@example.com'.
    - \* Onboarding location:** A dropdown menu with '-- Select Onboarding location --'.
    - \* Employee\_Type:** A dropdown menu with '-- Select Employee\_Type --'.
    - Manager's name:** A text field.
    - \* Department PL:** A dropdown menu with '-- Select Department PL --'.
- Footer:** Includes 'Save', 'Save and Configure Requester', and 'Cancel' buttons.

- Right Sidebar:**
- Service Category:** 'Employee onboarding and offboarding'.
- Template:** 'Employee onboarding- Pro'.
- Drag & Drop Fields:** A section with 'Available' and 'New' tabs.
- Available Fields:** A list of fields that can be added to the form, including 'AD User Name', 'Address for Communication', 'Affect copies exist in Zoho's linf...', 'Application Access', 'Application module', 'Application Name', 'Application that's causing issues', 'Application version?', and 'New section'.

Customizable service request template

- Design employee onboarding request templates using a drag-and-drop editor. Add different sections and fields to capture all necessary information upfront and eliminate the chaos of back-and-forth communication.
- Make these templates dynamic with form rules that define condition-based actions on form fields. These actions could include showing or hiding fields, setting mandatory fields, pre-populating common values, or even controlling whether requesters can view or edit specific fields. For example, you can display only the fields relevant to each employee type, such as full-time or contractor. This way, the form stays focused and relevant, no matter the employee type or department.
- Restrict template access to specific user groups to ensure templates are only visible to the right users. For example, show onboarding templates only to a group named hiring managers so that only the right users can view and raise these requests.
- When collecting personally identifiable information like emails and phone numbers, mark those fields as encrypted and compliant with regulations such as the GDPR and HIPAA. This helps protect employee data without slowing down the request process.
- Leverage Zia, the built-in AI assistant, to automatically predict and fill in key request fields, such as category, sub-category, and priority. Please note that Zia trains on historical ticketing data to fine-tune its predictions, so it depends on the completeness and accuracy of your previous onboarding and offboarding tickets.
- Under the resource information tab in the template, add sections to specify devices, software, and other resources to be provisioned. Enable image previews and display cost information where needed, helping requesters and approvers understand the scope and budget impact.



Requester view: Resource information section

## b. Keep onboarding on track by automating approvals, routing tasks, and enforcing SLAs

- Assign up to five levels of approval stages directly in the template and link them to specific roles or individuals. Automatically notify approvers and configure whether all, any one, or a percentage of approvers are needed to move the request forward.
- Assign the appropriate technician group to ensure requests are routed immediately to the right team without manual intervention.

- Predefine tasks and checklists to guide departments like HR, IT, and Payroll through their responsibilities, ensuring nothing is missed before moving the request forward.
- Combine these with service-level agreements (SLAs) to set clear response and resolution timelines for each request, enforce accountability, and automatically trigger escalations, both proactively and reactively, alerting the relevant stakeholders before or after deadlines are missed.
- Organize all onboarding templates under a dedicated service category in the service catalog.
- Once these templates are in place, they can be published in the service catalog and made accessible only to hiring managers and HR reps through the self-service portal. We'll explore that in detail in Chapter 4.



**Edit Service Request SLA**

Name\*

Description

**Conditions**

When a request arrives: ☒ Apply conditions based on criteria ☐ Apply no condition

Template is Employee onboarding RLC

Service Requests should be

Responded within: Days 0 Hours 0 Minutes 0

Fulfilled within: Days 14 Hours 0 Minutes 0

☐ Should be resolved irrespective of operational hours

☐ Including holidays

☐ Including weekends

**If response time has elapsed**

☐ Enable Level 1 Escalation

**If resolution time has elapsed**

☒ Enable Level 1 Escalation

Escalate Before: Days 1 Hours 0 Minutes 0

Escalate To:

+ Select Custom Actions

No actions are configured

☒ Enable Level 2 Escalation

Escalate After: Days 0 Hours 6 Minutes 0

Escalate To:

+ Select Custom Actions

**Configure the fields to be updated**

Group	User Management « Base Site	-	+
Level	Tier 4	-	+
Priority	High	-	+

Override request values with service level agreement values ☒

☐ Enable Level 3 Escalation

☐ Enable Level 4 Escalation

## Configuring SLAs in ServiceDesk Plus

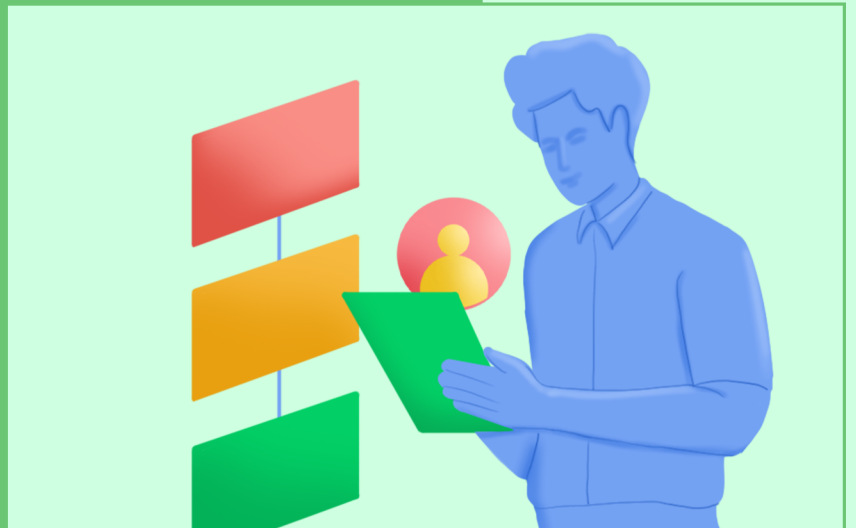
## **What about employee offboarding?**

- Build offboarding request templates that capture all the essentials, such as last working date, asset return details, and access revocation needs.
- Assign approval stages; route tasks like revoking access, disabling AD accounts, retrieving assets and ID cards, etc. to different departments; and track their completion with SLAs. This way, you can ensure that nothing slips through the cracks, even when offboarding multiple employees at once or on short notice.

CHAPTER

# 02

## **Accelerate onboarding and offboarding employees with powerful orchestrations**



Submitting an onboarding request is just the beginning. The real challenge lies in executing the many follow-up steps efficiently, coordinating across departments, tracking dependencies, and minimizing delays or manual errors.

With ServiceDesk Plus, you can streamline every stage of employee transition using robust workflows and orchestrations that tie people, processes, and systems together. Instead of relying on emails or spreadsheets, you can build end-to-end workflows that handle onboarding with accuracy and consistency. Whether it's provisioning accounts and devices for new hires or adding the new hire to a specific AD user group, you can track and automate every task.

## **a. Eliminate manual effort by automating onboarding workflows end to end**

- Associate a workflow with the appropriate onboarding request template to ensure a tailored and consistent fulfillment process based on employee type, location, or department.
- Design end-to-end onboarding workflows that automate each step of the request fulfillment process, from approvals and provisioning to final hand off, using ServiceDesk Plus' visual workflow builder. With a drag-and-drop canvas, you can create workflows tailored to your organization's unique requirements without writing any code.
- Build these workflows by using a combination of flow, condition, action, orchestration, and branch nodes to design flexible automations that manage process flow, apply logic, trigger tasks, coordinate integrations, and handle multiple paths.

- Define conditions to automatically move requests through stages based on real-time data. For example, when HR approves a request, the workflow can automatically assign tasks to IT for laptop provisioning and notify payroll to initiate salary setup.
- Trigger tickets in other departments, like IT, Facilities, Finance, and Legal, when an onboarding request originates in HR. Use custom widgets to track the progress of these child tickets within the parent HR request, giving the HR team a consolidated view of the progress of the request.
- Embed decision points by using switch nodes within workflows to handle different onboarding paths, such as full-time employees, contractors, or interns, ensuring every scenario follows the correct process without manual intervention.
- While workflows offer end-to-end automation capabilities, user transitions, which are manual touchpoints, can be embedded within workflows to guide technicians while retaining human intervention and control throughout the request fulfillment process.
- User transitions and guided paths control and restrict status movements within a workflow. Define the user transitions with scope rules to ensure that only authorized individuals can advance the onboarding request to the next status. Also, specify mandatory fields and action-based conditions to collect all necessary information and perform actions before proceeding to the next stage.
- Enable the guided path feature to enforce directional flows and eliminate manual status overrides, ensuring that the onboarding request progresses exactly as designed.

- Use built-in timers and SLAs to enforce deadlines for each task or approval step. If a step is delayed, automate escalations to notify managers or reassign tasks to keep onboarding on track.
- Incorporate low-code custom actions to perform bespoke actions not available out of the box but tailored to your specific requirements with Custom Functions. Custom Functions are written in Zoho's proprietary low-code scripting language called Deluge.



#### **Already using ServiceDesk Plus?**

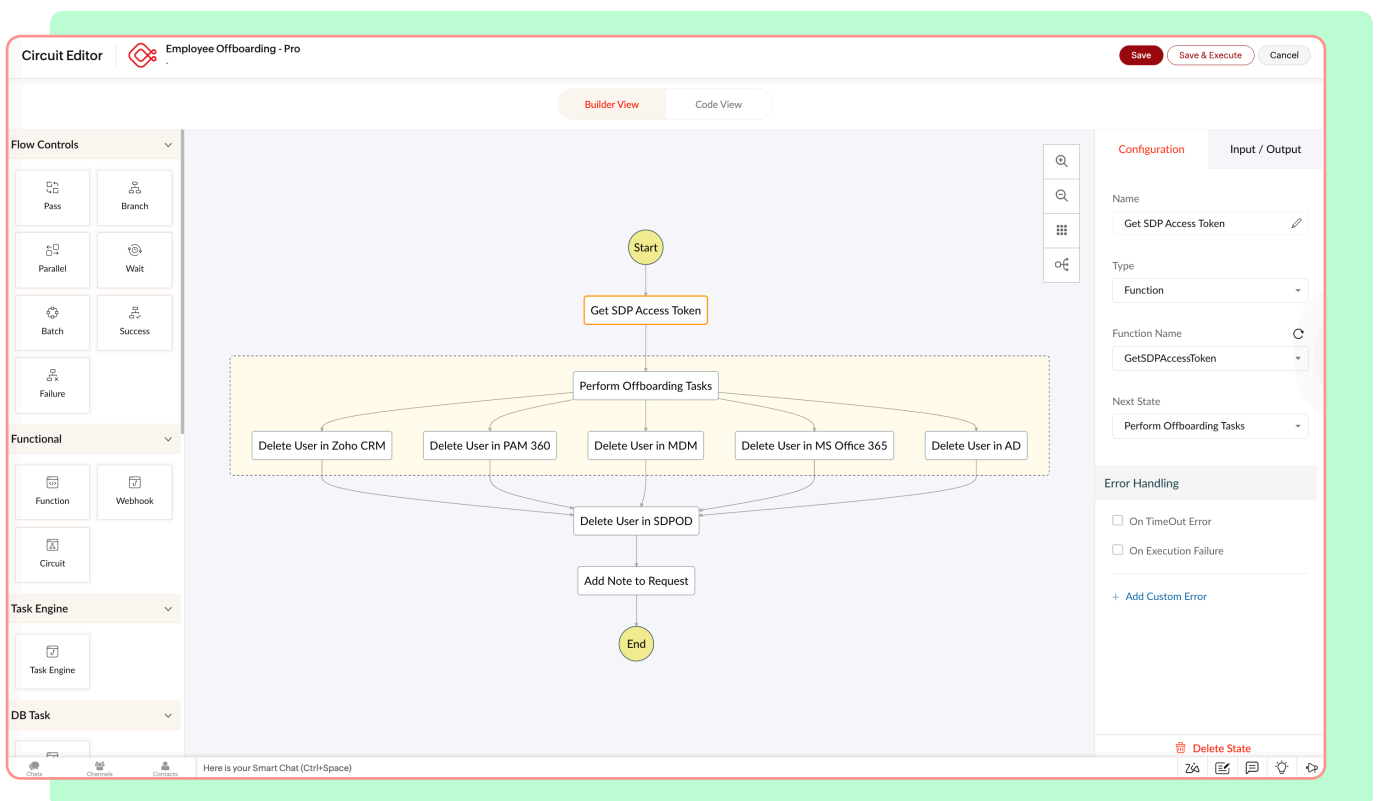
Write to us at [hello@servicedeskplus.com](mailto:hello@servicedeskplus.com) for a quick walkthrough on how you can tailor the workflows with automations specific to your requirements.

## **b. Orchestrate complex, multi-system onboarding tasks with Circuits, Zoho Flow Actions, and Action Sequences**

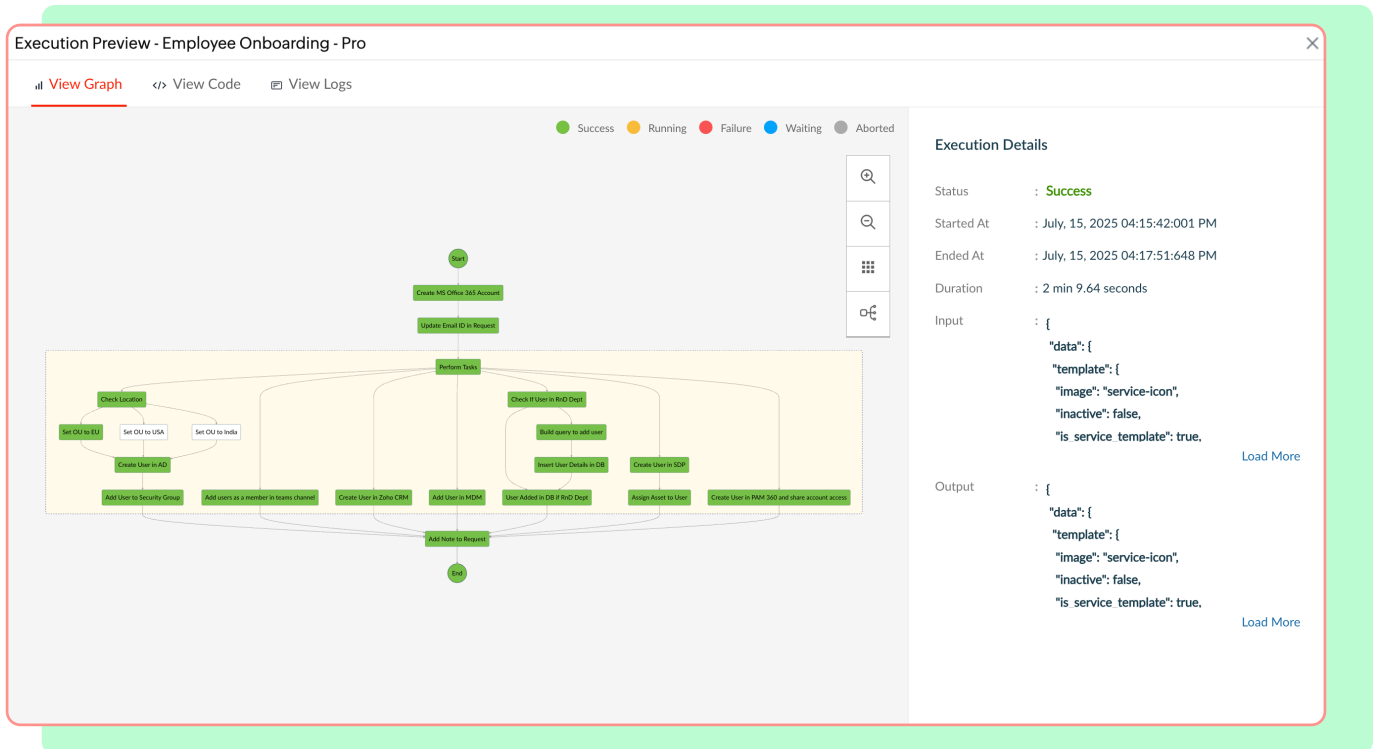
- Single-touch workflow automations, powered by Zoho Circuit, our native no-code/low-code orchestration platform, helps you automate complex employee onboarding workflows that span across multiple teams and systems with minimal manual intervention.
- Use the visual designer to drag and drop logic blocks, then configure whether tasks should run sequentially, in parallel, or in batches.



- Set up event-based triggers to kick off tasks automatically when certain onboarding milestones are met. For example, once HR marks a new hire as confirmed, that single action can trigger a cascade of tasks like account creation in Active Directory, email provisioning in Microsoft 365, access setup in cloud applications, internal database updates, and even the execution of PowerShell or SSH commands.



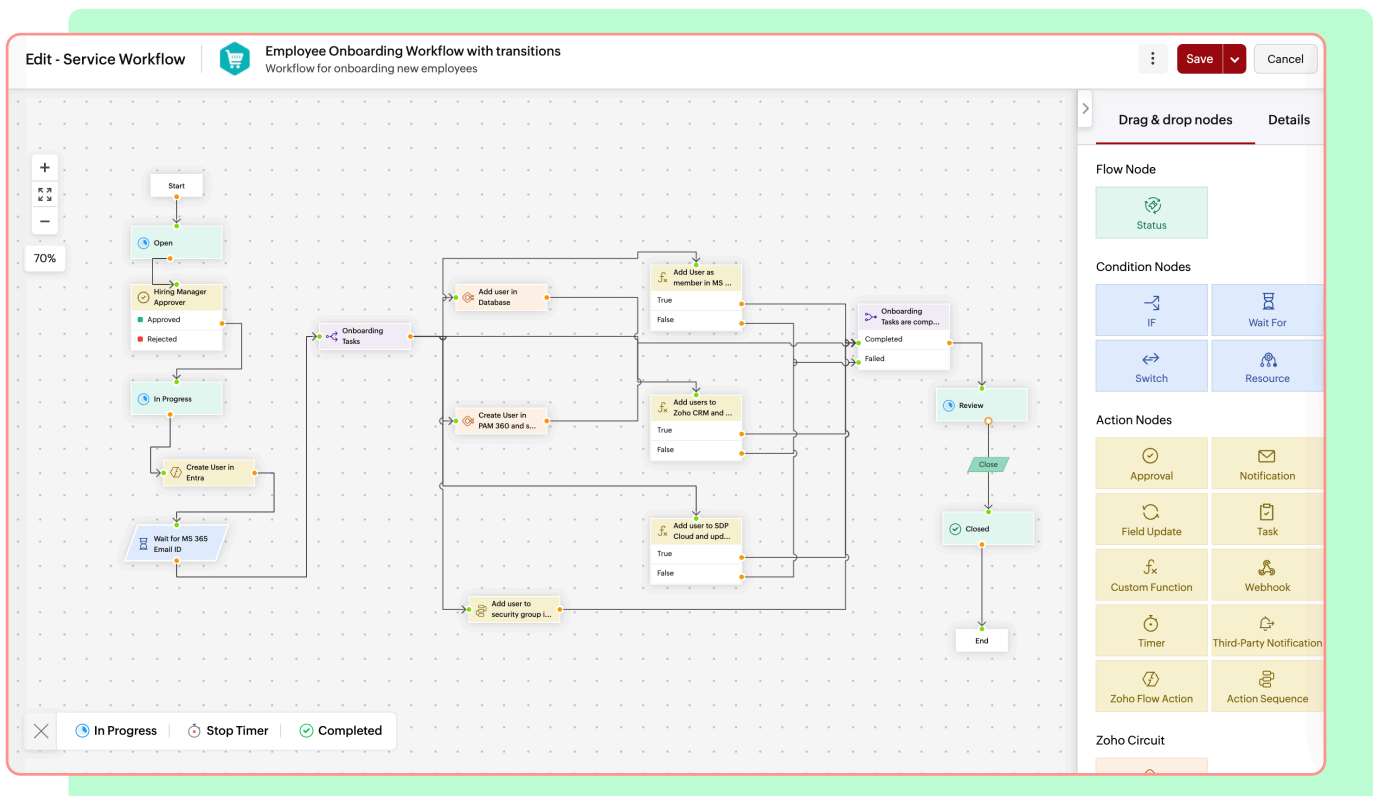
## Building an employee offboarding circuit in ServiceDesk Plus



## Execution preview of employee onboarding circuit in ServiceDesk Plus

- Extend your workflows beyond ServiceDesk Plus using the Zoho Flow node. Zoho Flow, the native iPaaS engine within ServiceDesk Plus, helps IT and enterprise service teams seamlessly integrate with over 95 SaaS applications like Microsoft Entra ID, Microsoft Teams, and Slack to orchestrate cross-platform actions such as adding users to groups or set up accounts, no coding required.
- Use Action Sequences to perform multiple related actions in a specific order, with each step sharing data with the next. For example, when a new employee onboarding request is raised, an Action Sequence can first create a user account in Entra ID, and then add a note to the onboarding request in ServiceDesk Plus with the generated user ID for future reference.

- Use webhook calls and custom functions in ServiceDesk Plus, built on REST APIs, to integrate the workflows with external systems not natively supported by ServiceDesk Plus.
- Monitor workflow progress through real-time dashboards and detailed audit trails. You can quickly identify bottlenecks, track compliance, and generate reports to optimize your onboarding process continuously.



**Sample employee onboarding workflow in ServiceDesk Plus**

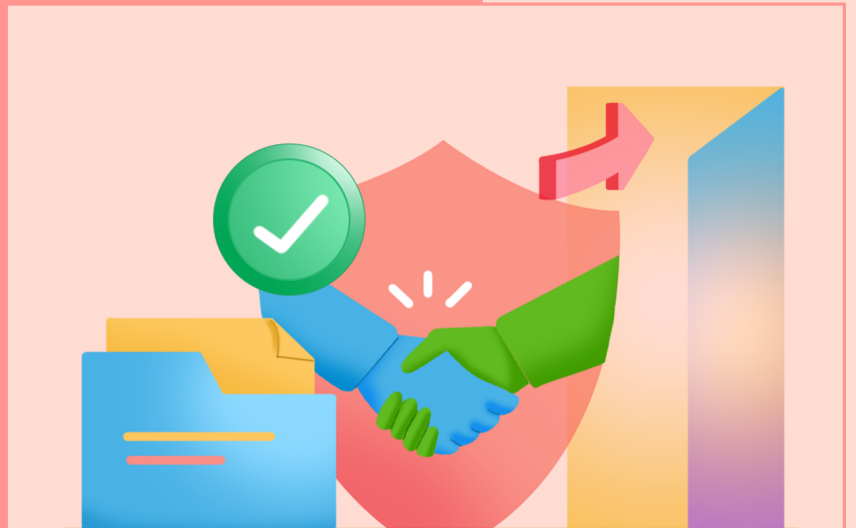
## **What about employee offboarding?**

- ServiceDesk Plus helps you automate the entire offboarding process, from revoking access and retrieving assets to final approvals and exit clearances. Use the same powerful workflow builder to define clear, structured paths that ensure no step is missed.
- For example, when an employee's end date approaches, an offboarding request can be automatically initiated and workflows can be triggered to notify different department, like IT to disable accounts, Facilities to reclaim workspace, and Finance to process final settlements, coordinating all stakeholders seamlessly.
- Automate tightly coupled, multi-step offboarding activities, like disabling user accounts, revoking licenses, removing privileged access, and wiping devices with Zoho Circuit.
- With Zoho Flow, remove users from Microsoft Entra ID, revoke access to Zoom or Slack, and automatically update the status in your HRMS, like People HR and SmartHR, without writing a single line of code.
- This way, you can keep offboarding on schedule, ensuring every exit is handled efficiently, securely, and consistently.

CHAPTER

# 03

**Break down silos and  
enable cross-department  
collaboration with  
enterprise service  
management**



Employee onboarding and offboarding processes require close collaboration across many departments, from HR and IT to facilities, finance, and legal. Each department has distinct workflows and service requirements, and a one-size-fits-all approach often leads to inefficiencies and confusion.

ServiceDesk Plus offers ESM capabilities to address this challenge that help spin up data and process autonomous service desk instances tailored to each department, all within a single, unified platform. This holistic setup empowers organizations to build department-specific workflows while improving cross-functional collaboration, and deliver a seamless and consistent service experience that supports employees throughout their entire journey.

## **a. Empower every department with process-autonomous service desks**

- Each department can build and manage its own unique onboarding and offboarding workflows tailored to its operations. From department-specific tasks and templates to SLAs and automations, teams can maintain full control over their processes and data, ensuring autonomy without compromise.



### **HR**

Manage document submissions, policy acknowledgment, benefits enrollment, and induction.



### **IT**

Provision devices and system access during onboarding.





## Facilities

Coordinate workspace setup or equipment allocation for new hires.



## Legal and compliance

Oversee contract signings, confidentiality agreements, and regulatory checks.

- OrgAdmins can create these instances, assign owners, and configure access to ensure only the right people interact with each service desk. This decentralized setup keeps workflows organized, minimizes bottlenecks, and lets each team focus on delivering their part of the onboarding process efficiently and independently.

**ESM Directory**

Organization Details  
User Management  
Custom Domains  
SAML Authentication  
Active Directory Settings  
Custom Service URLs  
**Service Instances**  
ESM Portal  
Extension Builder

**Service Instances**

Departments can manage their operations by creating separate instances of ServiceDesk Plus, ServiceDesk Plus MSP, or AssetExplorer. End users can access the required services from their respective service instance.

**IT Help Desk** (SDP) | IT HelpDesk  
URL Name : itdesk | Time Zone : ( GMT +05:30 ) India Standard Time ( Asia/Kolkata ) | Owner : santhosh@myservicedeskplus.com |  
Access permissions : Everyone in the organization | Custom Service URL : learnonehelpdesk.sdpondemand.manageengine.com  
Go to Instance | Actions

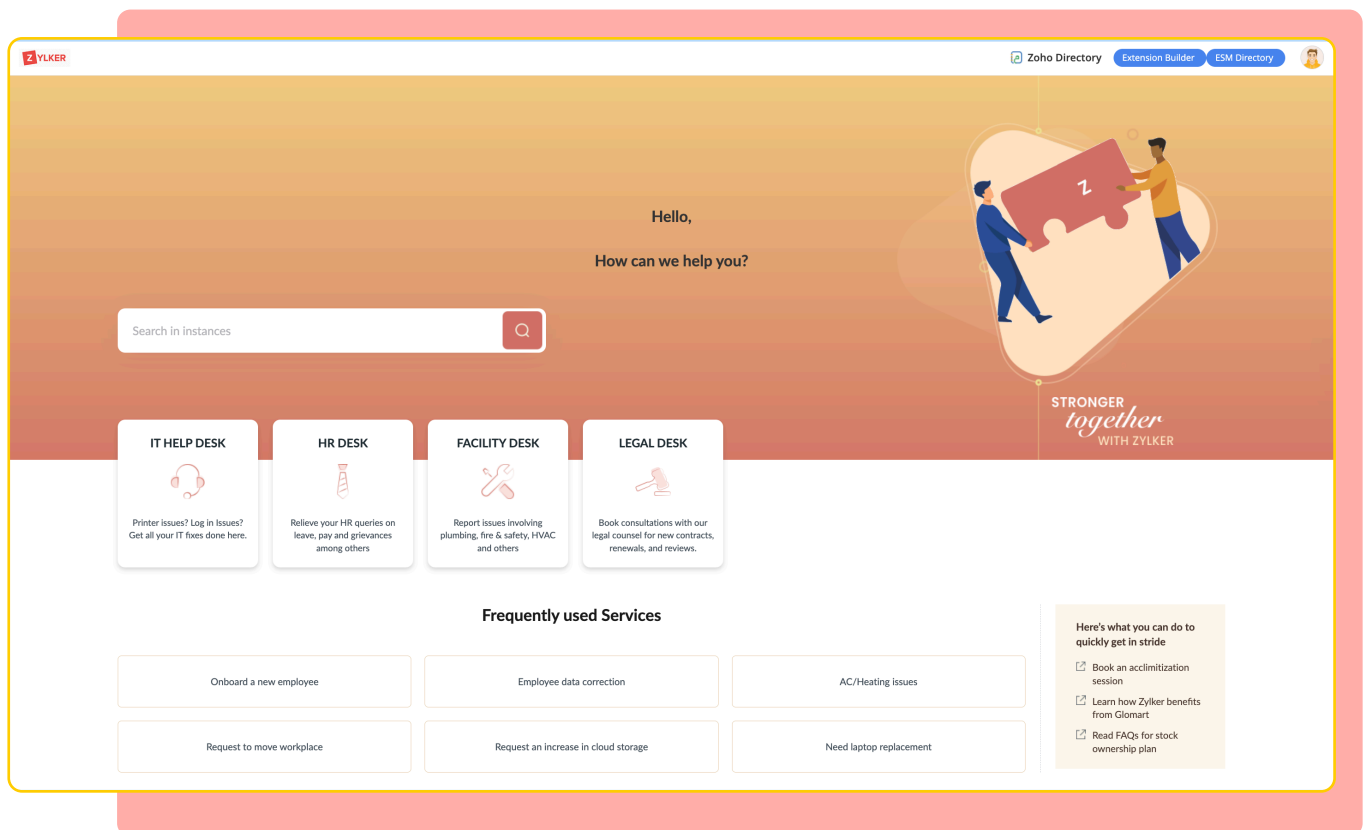
**HR Help Desk** (SDP) | HR HelpDesk  
URL Name : hr4help | Time Zone : ( GMT +05:30 ) India Standard Time ( Asia/Kolkata ) | Owner : santhosh@myservicedeskplus.com |  
Access permissions : Everyone in the organization | Custom Service URL : learnonehelpdesk.sdpondemand.manageengine.com  
Go to Instance | Actions

**Facilities Desk** (SDP) | Facilities Desk  
URL Name : facility4you | Time Zone : ( GMT +05:30 ) India Standard Time ( Asia/Kolkata ) | Owner : charles.arokiaraj+6@zohotest.com |  
Access permissions : Everyone in the organization | Custom Service URL : learnonehelpdesk.sdpondemand.manageengine.com  
Go to Instance | Actions

**Finance Desk** (SDP) | IT HelpDesk  
URL Name : facilitiesdesk | Time Zone : ( GMT +05:30 ) India Standard Time ( Asia/Kolkata ) | Owner : santhosh@myservicedeskplus.com |  
Access permissions : Everyone in the organization | Custom Service URL : learnonehelpdesk.sdpondemand.manageengine.com  
Go to Instance | Actions

**Legal** (SDP) | IT HelpDesk  
URL Name : zylkerlegal | Time Zone : - | Owner : santhosh@myservicedeskplus.com | Access permissions : Everyone in the organization |

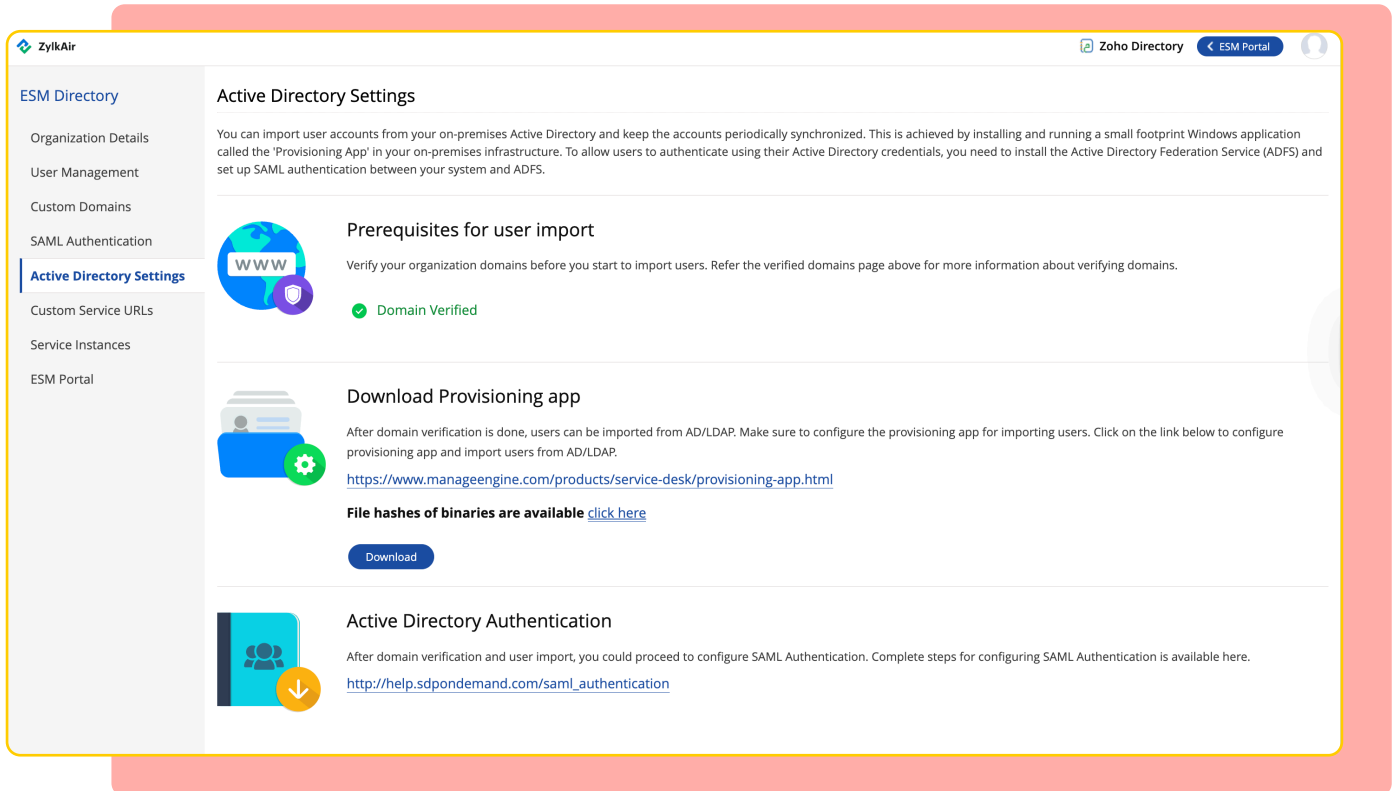
- At the same time, collaboration remains seamless as all those department-specific service desks can be made accessible through the ESM portal, a centralized gateway where employees can find and navigate to all service desk instances available to them.
- You can also customize the portal's layout, add helpful quick links, and even configure organization-specific landing pages. This creates a unified, user-friendly entry point to all onboarding-related services across departments.



ESM portal

## **b. Centralize user management to simplify coordination across teams**

- Manage employees across multiple service desks seamlessly with the ESM directory.
- Start by importing user accounts from your on-premises Active Directory using the lightweight provisioning app. Once installed within your infrastructure, the app lets you import users into ServiceDesk Plus and keep their profiles up to date with scheduled syncs, ensuring that your service desk always reflects the latest organizational structure.
- For organizations using Entra ID, you can set up Entra ID User Sync to automatically import and update user profiles. Define import criteria and map Azure fields, such as department, job title, or reporting manager, to corresponding fields in ServiceDesk Plus.
- Import new hires once and provision them access across all necessary instances so they get timely access to resources and services.
- Additionally, ServiceDesk Plus supports Active Directory-based authentication via SAML 2.0, allowing users to securely log in using their AD credentials.



### Active Directory setup in ServiceDesk Plus' ESM directory

CHAPTER

# 04

## **Empower hiring managers, new hires, and employees with self-service**



Delivering a seamless onboarding experience is more than just provisioning devices and accounts. It's about enabling employees to hit the ground running by giving them instant access to the right information, services, and support. Achieving this outcome requires service departments to ensure hiring managers are able to seamlessly access onboarding and offboarding services, with clarity over the entire workflow.

ServiceDesk Plus also helps you create a welcoming and productive start for every new hire by blending intuitive self-service options, curated service catalogs, and real-time assistance into the onboarding journey.

### **a. Let HR and hiring managers easily onboard and offboard employees**

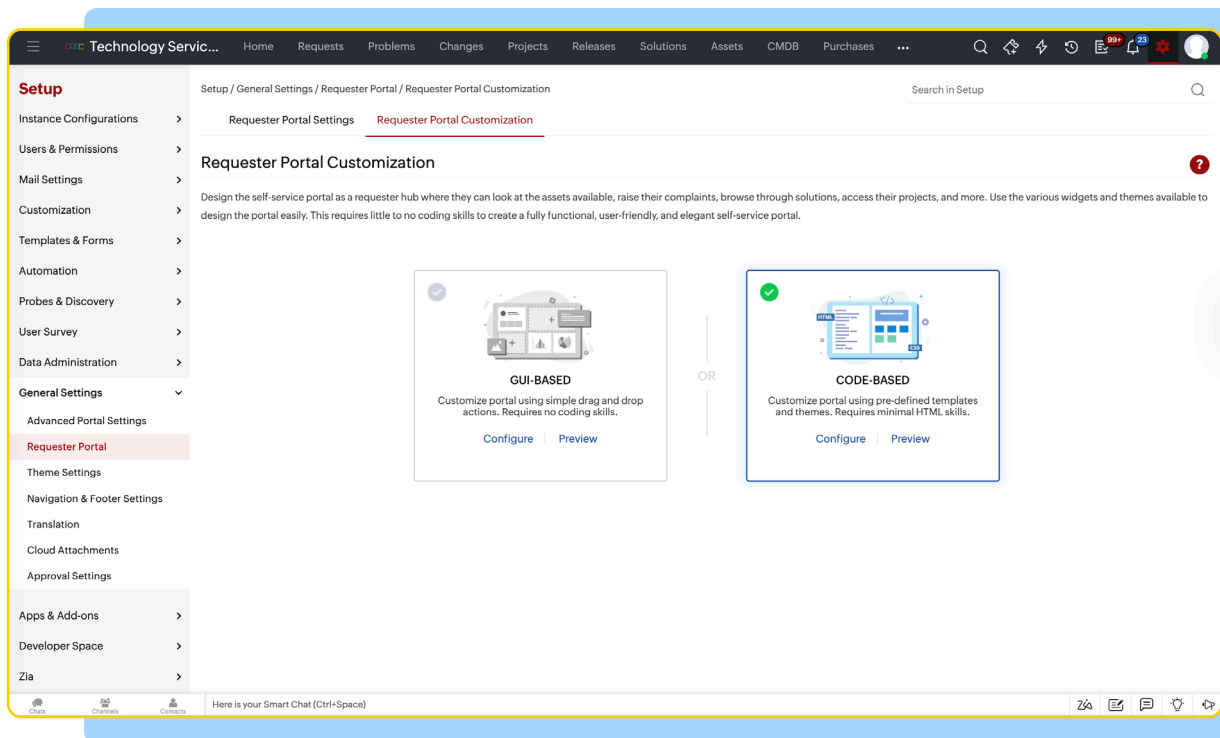
- Customize the end-user facing self-service portals across IT, HR, and Facilities with onboarding and offboarding services being published through instance-specific service catalogs. Ensure that only hiring managers or HR executives can access these services by setting up dedicated User Groups.
- Service Catalogs in ServiceDesk Plus act as centralized storefront of all the services your IT and business teams provide. You can categorize services in a way that's intuitive for employees, so they can quickly find what they need.
- For onboarding, you can create dedicated service categories like new hire setup, access requests, and more. Each category can house multiple service request templates that guide users through making requests for specific services, like hardware provisioning or granting VPN access.



- Using form rules, the template adapts dynamically, displaying only the relevant services, hardware, and software required for each new hire, thereby improving request accuracy.
- For example, a hiring manager in the Marketing department will see a template that includes marketing-specific software licenses and hardware options. Meanwhile, a Facilities technician handling the workspace setup for that new hire will only have access to the employee's name and workspace requirements, without exposure to any personal or sensitive information.

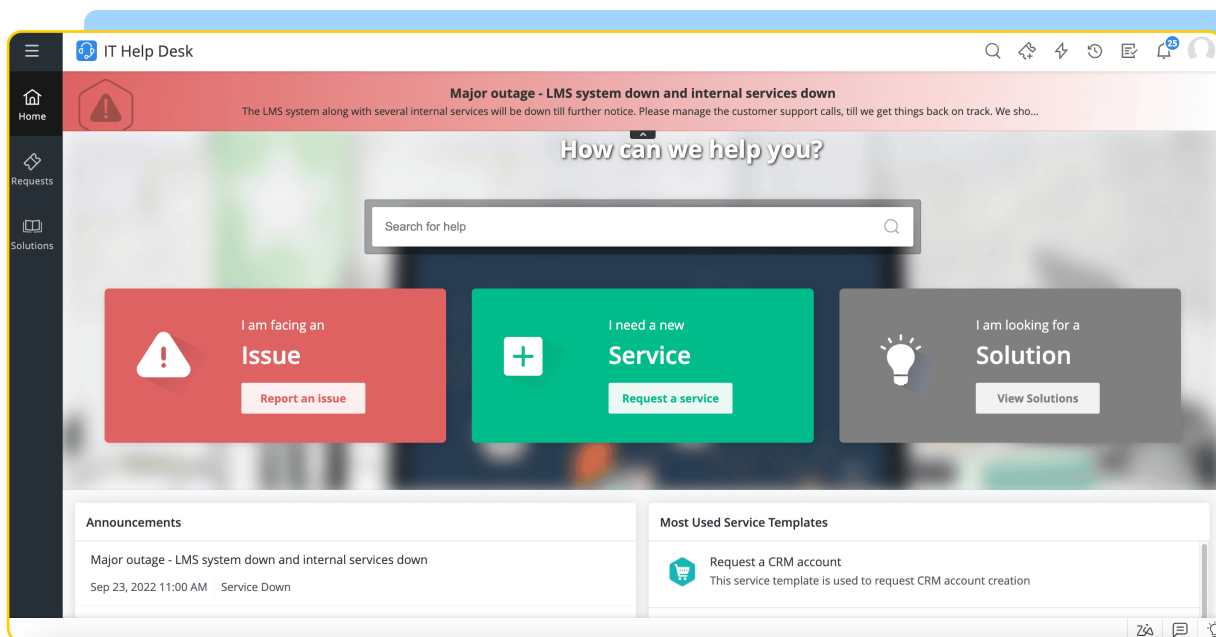
## **b. Give new hires a head start with an onboarding-ready self-service portal**

- When your new hires are onboarded into the organization, the enterprise self-service portal becomes the digital front door for them to access both IT support and other enterprise services. There are two ways to tailor the requester portal to reflect your brand and streamline user experience. Use code-based customization to edit HTML directly, integrate canned widgets, URL widgets, and attributes like search, live chat, and chatbot access, offering full-page control and visual branding through custom HTML. Or use GUI-based customization for a no-code experience with drag-and-drop panels, buttons, lists, and snippets. Build pages from scratch or start with templates, and configure the layout, styling, and embedded elements without writing any code.

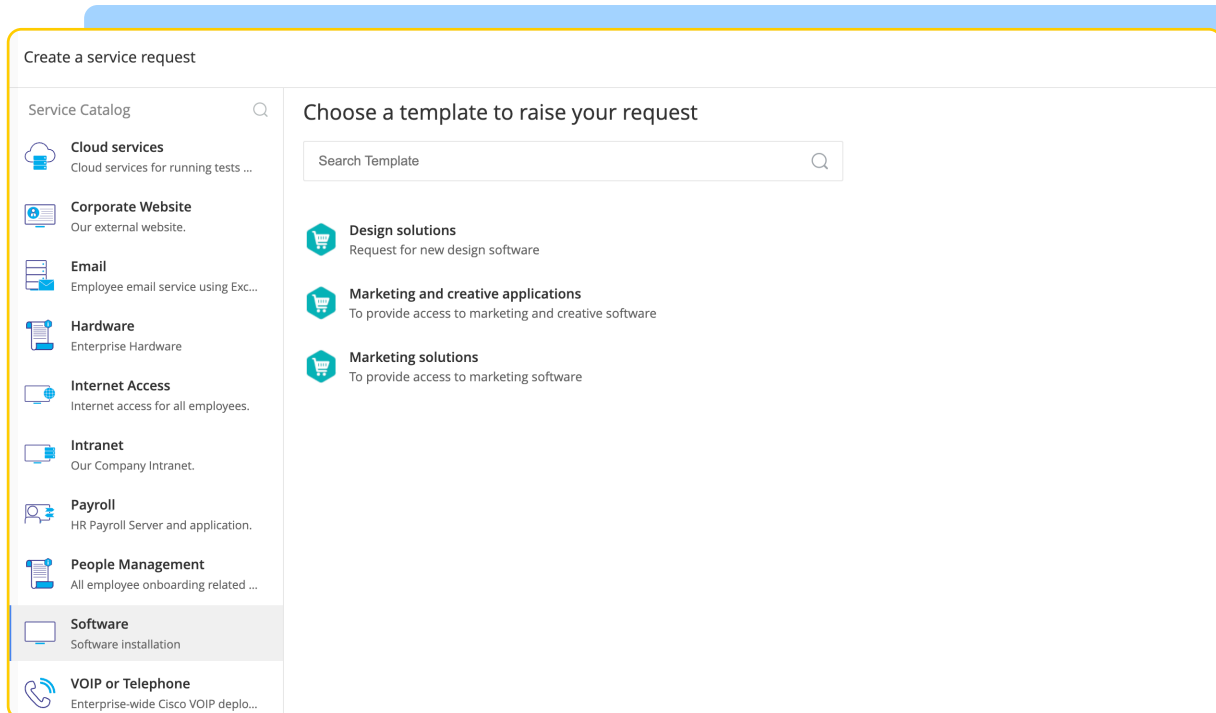


### Requester portal customization

- New employees can use the portal to submit requests, view announcements, and access onboarding-specific services and resources, all in one place.
- Tailor the portal experience using role-based permissions so employees only see what's relevant to their department, location, or employment type.
- Use custom widgets to display onboarding or exit task progress, assigned devices, upcoming training sessions, or helpful links, giving employees a sense of control from day one.
- Display targeted announcements, like scheduled IT orientations or system maintenance windows, can help reduce confusion and support ticket volume.



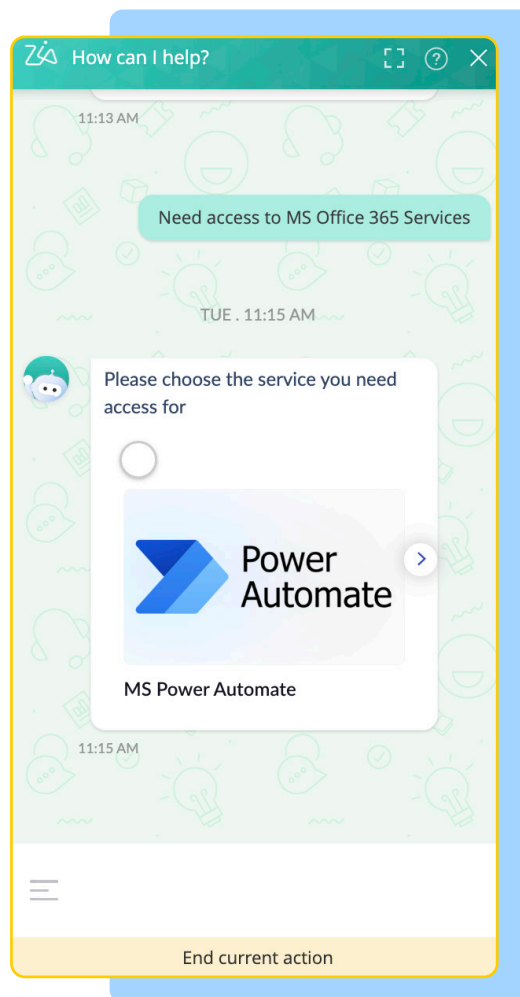
End user self-service portal



Service catalog

## **c. Offer real-time assistance with AI-powered virtual agents**

- ServiceDesk Plus offers real-time assistance through Zia, the conversational virtual agent. Available on both the web and mobile, Zia supports employees by answering questions, guiding users, and completing routine actions without technician involvement.
- Enable Zia to help with common queries like “How do I set up email?” or “Where do I return my laptop?” directly from the self-service portal.
- Design blended conversations to guide employees through multi-step processes, such as equipment returns or software installations.
- To leverage Zia’s GenAI capabilities, select the AI provider that best fits your needs. Zia LLM, ManageEngine’s native enterprise large language model, is fully hosted within ManageEngine’s secure data centers, ensuring your prompts, data, and responses stay private and compliant with data residency requirements. Alternatively, you can choose public LLMs like ChatGPT or Azure OpenAI, depending on your specific use cases and preferences.
- With Solution Assist, Zia enhances support by summarizing key information from knowledge base articles, using retrieval-based augmentation, delivering contextual recommendations to user queries with relevant citations.
- Zia can perform public knowledge discovery by securely accessing and compiling information from a wide range of external sources. This way, employees can troubleshoot common issues and get up to speed without raising a ticket.
- Use voice-enabled assistance in the mobile app to support employees even when they are away from their desks.

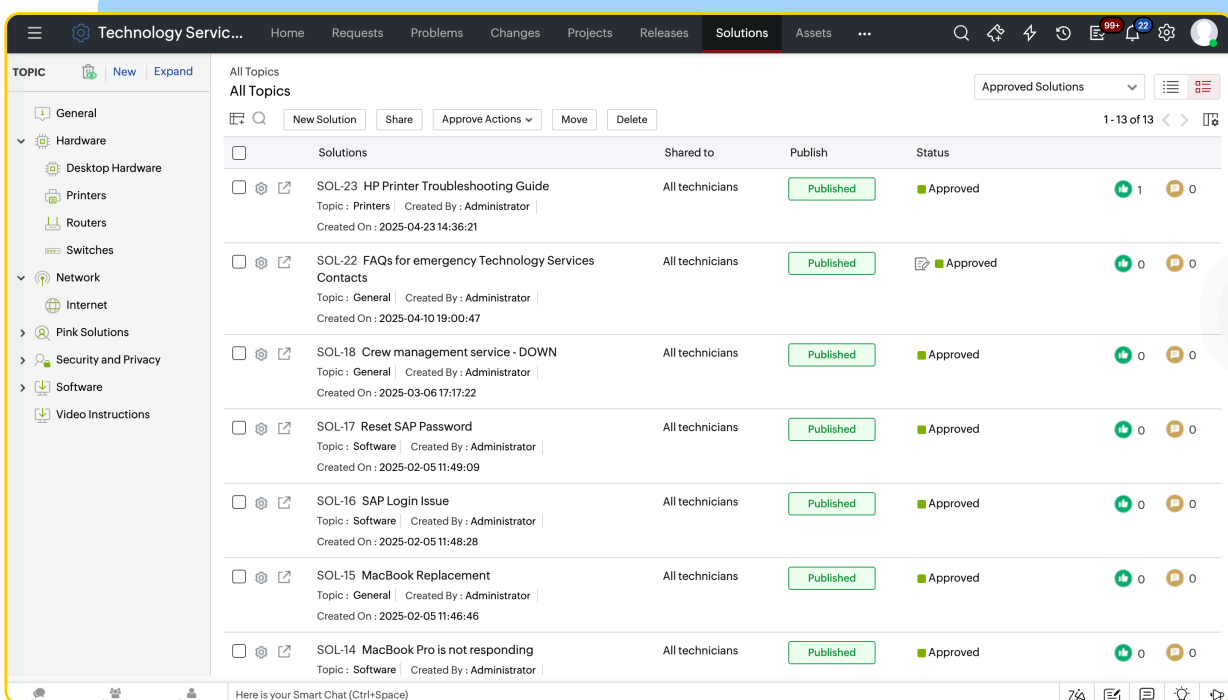


**Zia, our conversational virtual agent**

#### **d. Reduce dependency on IT with a knowledge base that empowers self-service**

- The Solutions module in ServiceDesk Plus allows you to build a robust, searchable knowledge base that includes solution articles, troubleshooting guides, and FAQs.
- Optimize the solution content for search with keywords and tagging, making it easy to find useful articles.

- And when time is short, you can let AI do the heavy lifting. Zia LLM, the native enterprise LLM, or ChatGPT and Azure OpenAI can help your teams convert natural language prompts into ready-to-publish articles with titles, structured content, and relevant keywords.
- Restrict solution visibility based on role, location, or employment type to ensure relevance.
- Organize content into specific categories, get it approved, and configure expiration dates to ensure knowledge remains accurate, relevant, and up to date.
- From the self-service portal, end users can explore the different solutions in the knowledge base and resolve issues on their own.



**Solutions module in ServiceDesk Plus**

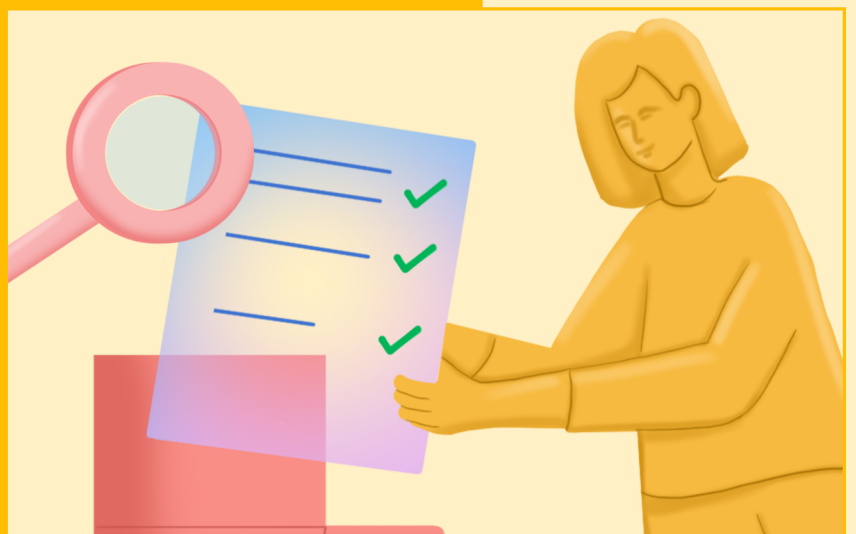
## **What about employee offboarding?**

- Through the self-service portal, managers, sysadmins, and HR service providers can easily access exit checklists, equipment return instructions, and policy acknowledgements. Customizable widgets display offboarding progress, upcoming exit tasks, or account deactivation schedules, ensuring transparency and reducing uncertainty.
- The service catalog can be configured with offboarding-specific categories such as asset returns, account deactivations, and exit clearances. These categories can house standardized request templates that guide employees and support teams through each step with clarity and consistency.
- Configure Zia to support offboarding employees by answering common questions like “How do I return company assets?” or “What are the steps to complete before my last day?” to reduce workload and accelerate resolution time.
- A well-maintained knowledge base offers relevant articles on exit procedures, security policies, and FAQs tailored to offboarding.

CHAPTER

# 05

**Stay audit-ready by  
aligning with IT asset  
management**





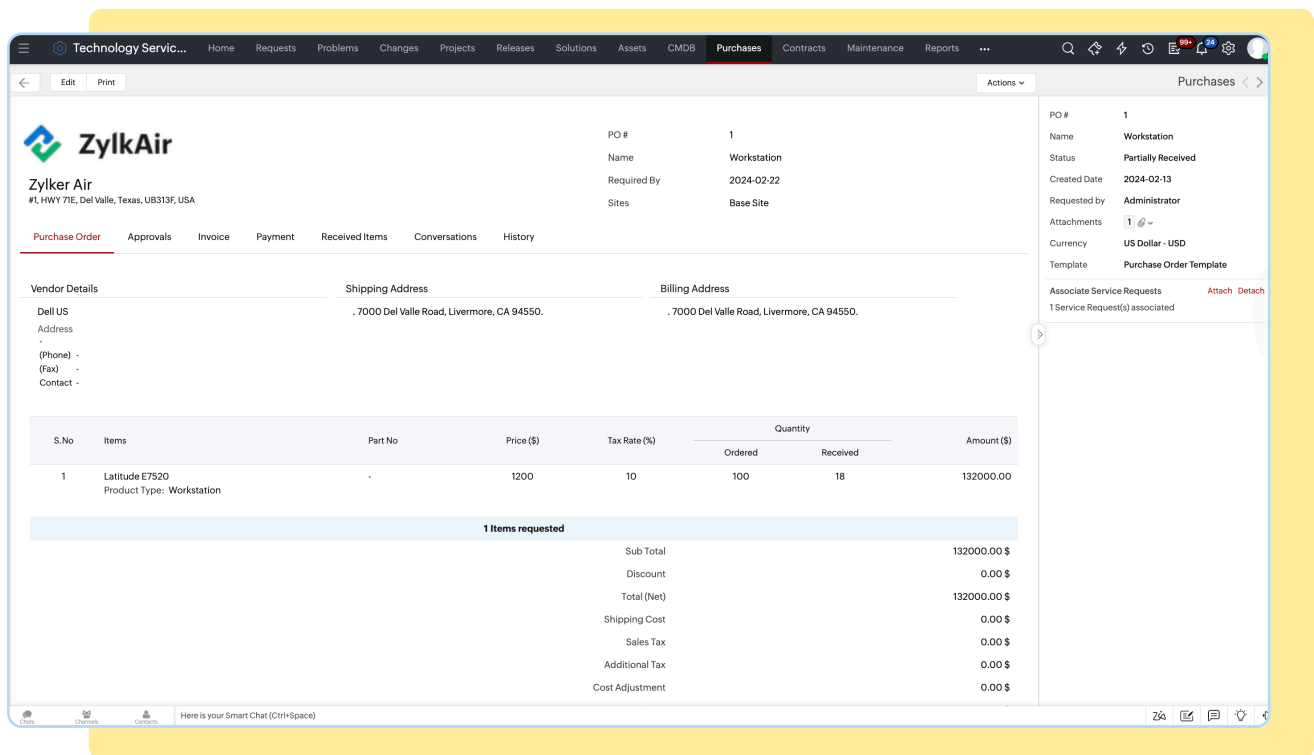
Managing IT assets and contracts effectively is key to removing friction from employee onboarding and offboarding. Without clear visibility into who holds which equipment, timely contract renewals, or streamlined procurement, organizations risk delays, compliance gaps, and unnecessary costs.

ServiceDesk Plus offers a unified platform to automate asset acknowledgment, consolidate provisioning details, oversee contracts, and simplify purchasing, all tailored to support smooth JML processes.

In this chapter, you'll see how integrating these processes ensures accountability, boosts efficiency, and helps your IT team stay ahead of the curve during every stage of the employee journey.

## **a. Streamline asset procurement with purchase management**

- The Purchase Management module automates procurement processes, ensuring timely acquisition and tracking of assets.
- Set up purchase order default values like currency, tax rates, billing/shipping addresses, and approval limits to standardize and control spending.
- Use cost centers to allocate purchases to specific departments or groups, helping budget for new equipment or returns.
- Manage general ledger (GL) codes to maintain accurate financial tracking of all procurement related to employee onboarding and offboarding.
- Link purchase orders to onboarding tickets to enable smoother approvals and faster delivery of required resources.



## Purchase management in ServiceDesk Plus

### b. Manage asset and service contracts throughout the employee journey

- Use the contract management module in ServiceDesk Plus to organize and track all agreements related to IT assets and services involved in onboarding.
- Customize contract types, such as lease, maintenance, support, and warranty, to categorize agreements linked to hardware, software licenses, or vendor services. Control access by assigning visibility to relevant roles or technicians.
- Configure contract ID prefixes and numbering for orderly records. Automate contract expiration alerts and link contracts to workflows to ensure timely renewals or terminations.

- Track compliance, warranty periods, and service agreements associated with employee assets to simplify asset life cycle management and reduce risk.

**Applecare Plan**  
Status: Yet to be Active | Active Till: Mar 6, 2025 | Contract Owner: Ashwin | Created By: Ashwin

**Contract Details**

Contract Name	Applecare Plan	Contract Owner	Ashwin
Vendor Name	Apple	Contract Type	Warranty
Contract Term	Definite	Active From	Feb 1, 2023
Parent Contract	-	Sites	All Sites
Contract Cost	150.00 \$		

**Description**  
Extends warranty coverage for up to 2 years

**Support Details**  
Global repair coverage

**Notifications**

Expiry Notification	Enabled
Users to be Notified	Ashwin
Emails to be Notified	admin@zyker.com
Notify Before	7 Days (Notification Pending)

**Expiry Request Details**

**Vendor Details**

Vendor Name	Apple
Contact Person	-
Email	-
Phone	-
Web URL	-

[View Full Details](#)

**Associations**

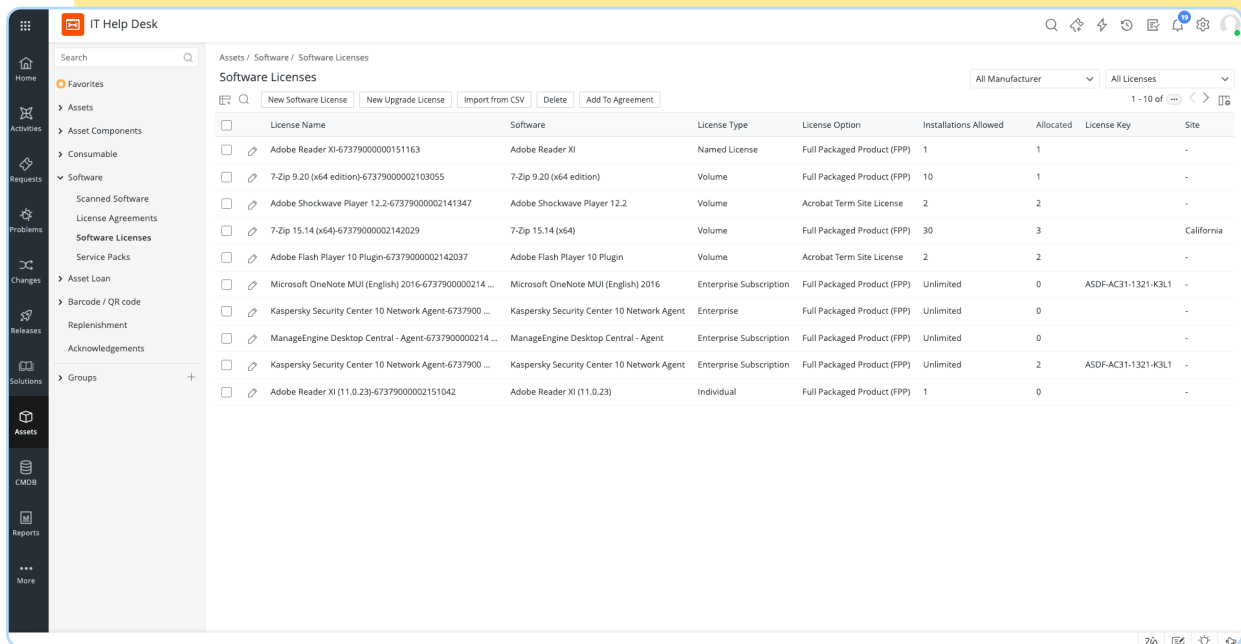
Assets	0
Software Licenses	0

Manage and track contracts effortlessly

## c. Optimize resource utilization with integrated asset and software license management

- ServiceDesk Plus empowers you to create tailored asset assignment workflows that align with your organization's unique processes. Automate asset assignment based on employee role, location, department, or employment type, ensuring accuracy and speed. Workflows can also include approvals and notifications, reducing manual effort and eliminating errors in asset distribution.

- Loan assets easily to end users or technicians for defined periods using the Asset Loan feature. Add multiple assets to a single loan, modify ongoing loans by adding assets, extend loan durations, or pre-close loans as needed. Return individual assets separately, while tracking all loans from a centralized dashboard. Automated email alerts keep all stakeholders informed, supporting transparent and efficient asset sharing.
- ServiceDesk Plus also helps in reducing compliance risks and optimizing software usage with centralized license management. Track license types, allocations, installations, and expirations automatically and link software assets with licenses and contracts to proactively manage license distribution during onboarding and reclaim licenses during offboarding, all from a single console that enhances visibility and control over software assets.



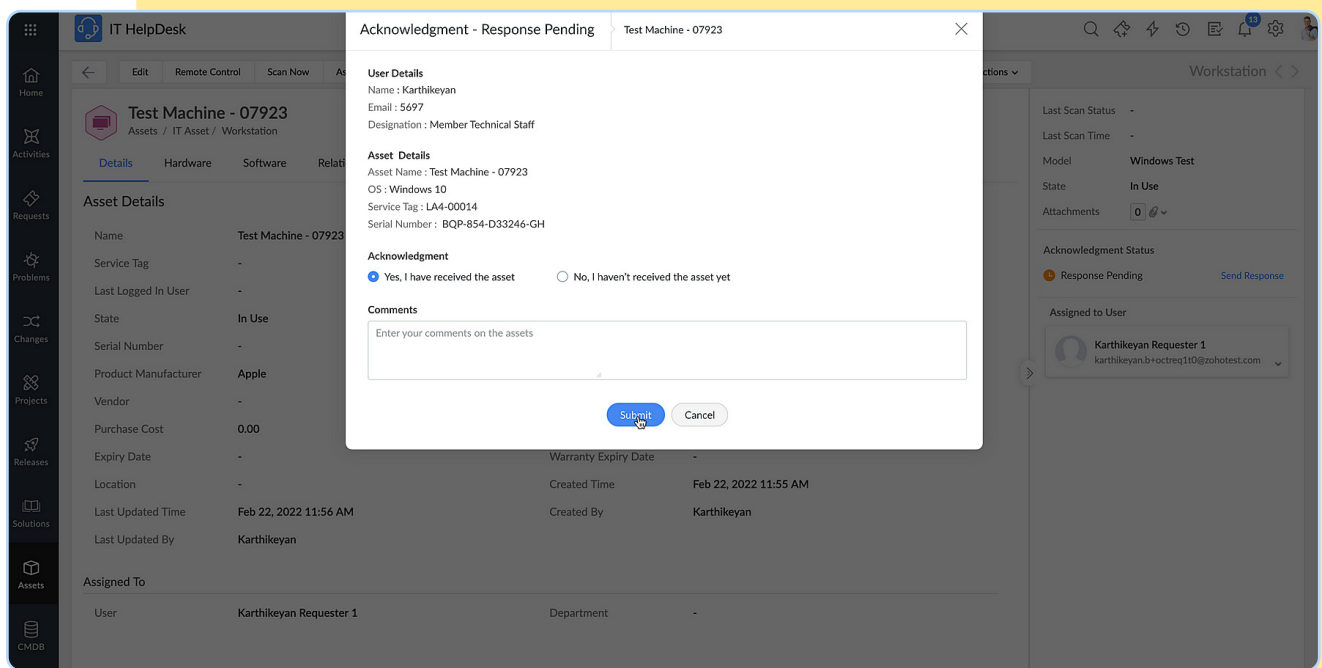
The screenshot displays the 'Software Licenses' section of the IT Help Desk interface. It features a sidebar with navigation options like Home, Favorites, Assets, and Software. The main area shows a table of software licenses with the following data:

License Name	Software	License Type	License Option	Installations Allowed	Allocated	License Key	Site
Adobe Reader XI-6737900000151163	Adobe Reader XI	Named License	Full Packaged Product (FPP)	1	1	-	-
7-Zip 9.20 (x64 edition)-67379000002103055	7-Zip 9.20 (x64 edition)	Volume	Full Packaged Product (FPP)	10	1	-	-
Adobe Shockwave Player 12.2-67379000002141347	Adobe Shockwave Player 12.2	Volume	Acrobat Term Site License	2	2	-	-
7-Zip 15.14 (x64)-67379000002142029	7-Zip 15.14 (x64)	Volume	Full Packaged Product (FPP)	30	3	-	California
Adobe Flash Player 10 Plugin-67379000002142037	Adobe Flash Player 10 Plugin	Volume	Acrobat Term Site License	2	2	-	-
Microsoft OneNote MUI (English) 2016-6737900000214...	Microsoft OneNote MUI (English) 2016	Enterprise Subscription	Full Packaged Product (FPP)	Unlimited	0	ASDF-AC31-1321-K3L1	-
Kaspersky Security Center 10 Network Agent-6737900...	Kaspersky Security Center 10 Network Agent	Enterprise	Full Packaged Product (FPP)	Unlimited	0	-	-
ManageEngine Desktop Central - Agent-6737900000214...	ManageEngine Desktop Central - Agent	Enterprise Subscription	Full Packaged Product (FPP)	Unlimited	0	-	-
Kaspersky Security Center 10 Network Agent-6737900...	Kaspersky Security Center 10 Network Agent	Enterprise Subscription	Full Packaged Product (FPP)	Unlimited	2	ASDF-AC31-1321-K3L1	-
Adobe Reader XI (11.0.23)-67379000002151042	Adobe Reader XI (11.0.23)	Individual	Full Packaged Product (FPP)	1	0	-	-

**Centralized console for software licenses**

## **d. Increase accountability with formal asset acknowledgment from employees**

- ServiceDesk Plus streamlines the process of tracking asset receipt by automating asset acknowledgment, ensuring clear accountability and a well-documented chain of custody.
- You can customize acknowledgment forms that are automatically sent whenever an asset is assigned, with options to enable acknowledgment based on asset type, department, or location.
- Employees and technicians can quickly confirm receipt via the self-service portal or directly through email.
- Admins have full visibility over the acknowledgement status through a centralized dashboard and can even send timely reminders as needed. Every action and response is logged for audit compliance and can be exported in detailed reports.
- To further accelerate this process, ServiceDesk Plus integrates with ChatGPT, allowing users to acknowledge asset receipt simply by replying to acknowledgment or reminder emails, boosting compliance and reducing delays.

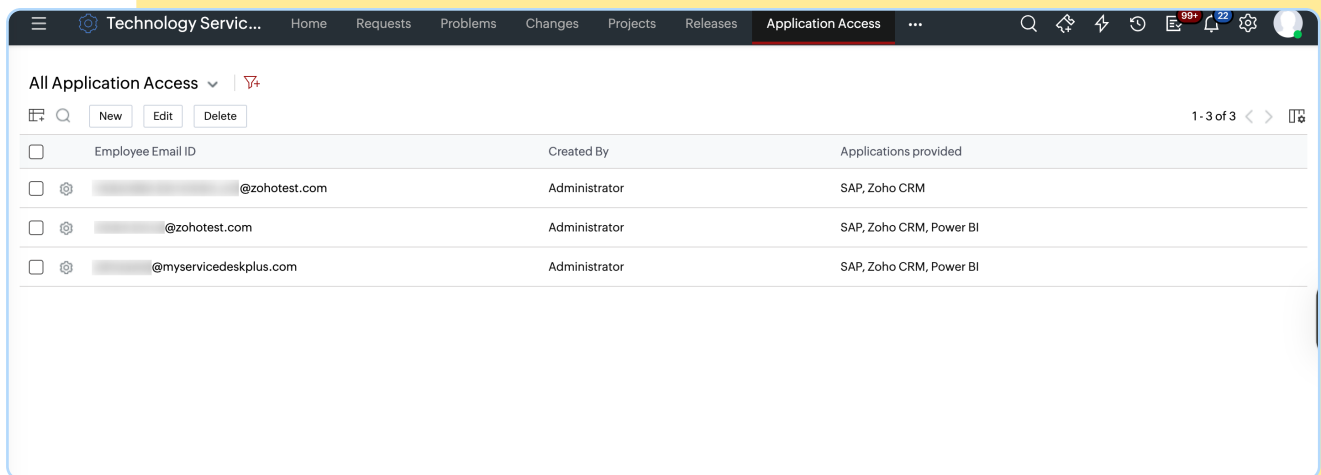


### Asset acknowledgement in ServiceDesk Plus

## e. Track asset ownership meticulously and optimize budgets

- ServiceDesk Plus also enables you to build and customize a new module from scratch, allowing you to capture and manage data that goes beyond the predefined modules. Use these custom modules to maintain a centralized, auditable record of all access and asset provisioning events tied to employee onboarding.
- With the intuitive drag-and-drop form builder, you can design the module to include important details like asset tags, software licenses, VPN credentials, and more.

- Mark critical fields as mandatory, encrypted, or unique to safeguard data integrity and compliance.
- Configure lookup fields to pull related data from assets, the CMDB, or other modules for interconnected tracking.
- Tailor the layout and control visibility with role-based access so IT, HR, and asset managers only see relevant information.



The screenshot shows the 'Application Access' section of the ServiceDesk Plus interface. It features a table with three columns: 'Employee Email ID', 'Created By', and 'Applications provided'. There are three rows of data, all created by an 'Administrator'. The first two rows are for email addresses ending in '@zohotest.com', and the third is for '@myservicedeskplus.com'. The applications provided are 'SAP, Zoho CRM' for the first two and 'SAP, Zoho CRM, Power BI' for the third. The interface includes a search bar, 'New', 'Edit', and 'Delete' buttons, and a pagination indicator showing '1 - 3 of 3'.

Employee Email ID	Created By	Applications provided
[redacted]@zohotest.com	Administrator	SAP, Zoho CRM
[redacted]@zohotest.com	Administrator	SAP, Zoho CRM, Power BI
[redacted]@myservicedeskplus.com	Administrator	SAP, Zoho CRM, Power BI

## Asset acknowledgement in ServiceDesk Plus



### Exploring ServiceDesk Plus?

[Book a personalized demo](#) to see how ServiceDesk Plus can help you reorganize your onboarding workflows.

## **What about employee offboarding?**

- Use custom modules to track and manage access revocation. Capture details of all issued credentials and associate them with offboarding records. These modules can drive deprovisioning workflows based on employee role or department, helping teams revoke VPN credentials, SaaS access, or software licenses in a controlled manner.
- On the procurement side, ServiceDesk Plus supports asset return, reallocation, or disposal with full traceability. Link assets to purchase orders and update cost centers as needed. Use workflows to initiate asset return or retirement processes, ensuring clean closure of every procurement record tied to the exiting employee.
- Integrate ServiceDesk Plus Cloud with Endpoint Central, ManageEngine's unified endpoint management solution, and embed Endpoint Central widgets, either in dashboards or tickets, to track deprovisioning tasks, initiate remote actions, and log every step of the offboarding process with full visibility and traceability.
- Draw up service or maintenance contracts related to procured assets, such as warranty coverage or AMC agreements, ensuring that laptops, printers, and other devices are kept in working condition and ready for the next hire.



CHAPTER

# 06

## **Fine-tune the onboarding and offboarding process through analytics and feedback**

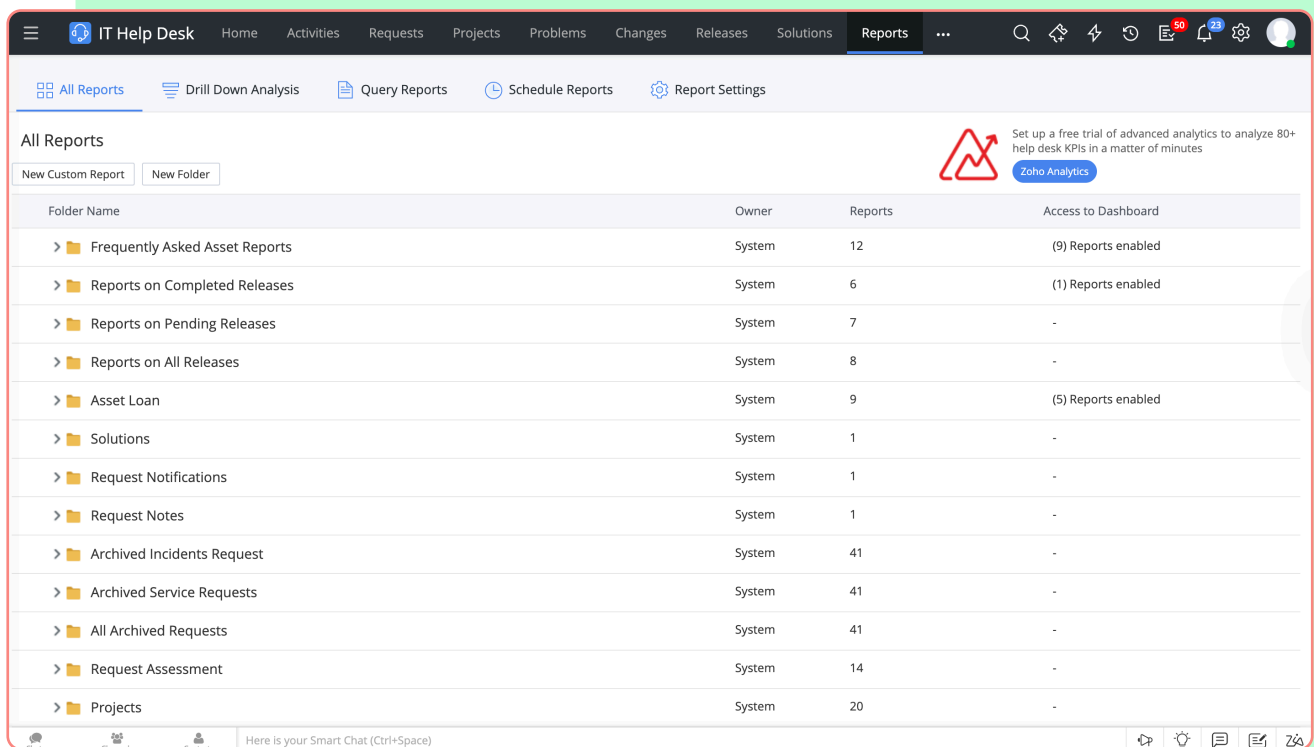


Every employee transition journey is a chance to improve the next one. Whether you are aiming to speed up timelines, identify delays, or gauge the employee's experience, having accurate data and feedback is key. Relying on assumptions or informal feedback loops can result in missed opportunities for improvement.

With ServiceDesk Plus, you can combine feedback, reporting, and visual dashboards to continuously optimize your onboarding, turning data into action and experience into insight.

## **a. Uncover performance trends and bottlenecks with detailed reports**

- Utilize ServiceDesk Plus' rich catalog of out-of-the-box reports designed to track essential employee transition metrics, like average completion time, SLA adherence, technician workload, task progress, request volumes across departments or sites, and survey results.
- Build custom reports to investigate specific challenges, for example, delays in provisioning access or recurring device return issues.
- Reports can be scheduled to run daily, weekly, or monthly and automatically emailed to stakeholders. This ensures that team leaders, HR managers, and IT admins stay in the loop without logging into the system.
- Integrate seamlessly with ManageEngine Analytics Plus to combine data across systems and gain a holistic view of your transition processes directly inside ServiceDesk Plus. Leverage these insights to eliminate bottlenecks, enhance coordination between teams, and continuously refine your employee transition experience.



The screenshot displays the 'Reports' section of the ServiceDesk Plus interface. At the top, there's a navigation bar with tabs for 'All Reports', 'Drill Down Analysis', 'Query Reports', 'Schedule Reports', and 'Report Settings'. Below this, a sub-header 'All Reports' is followed by buttons for 'New Custom Report' and 'New Folder'. A table lists various report categories, their owners, the number of reports, and dashboard access status. A Zoho Analytics banner is visible in the top right corner of the interface.

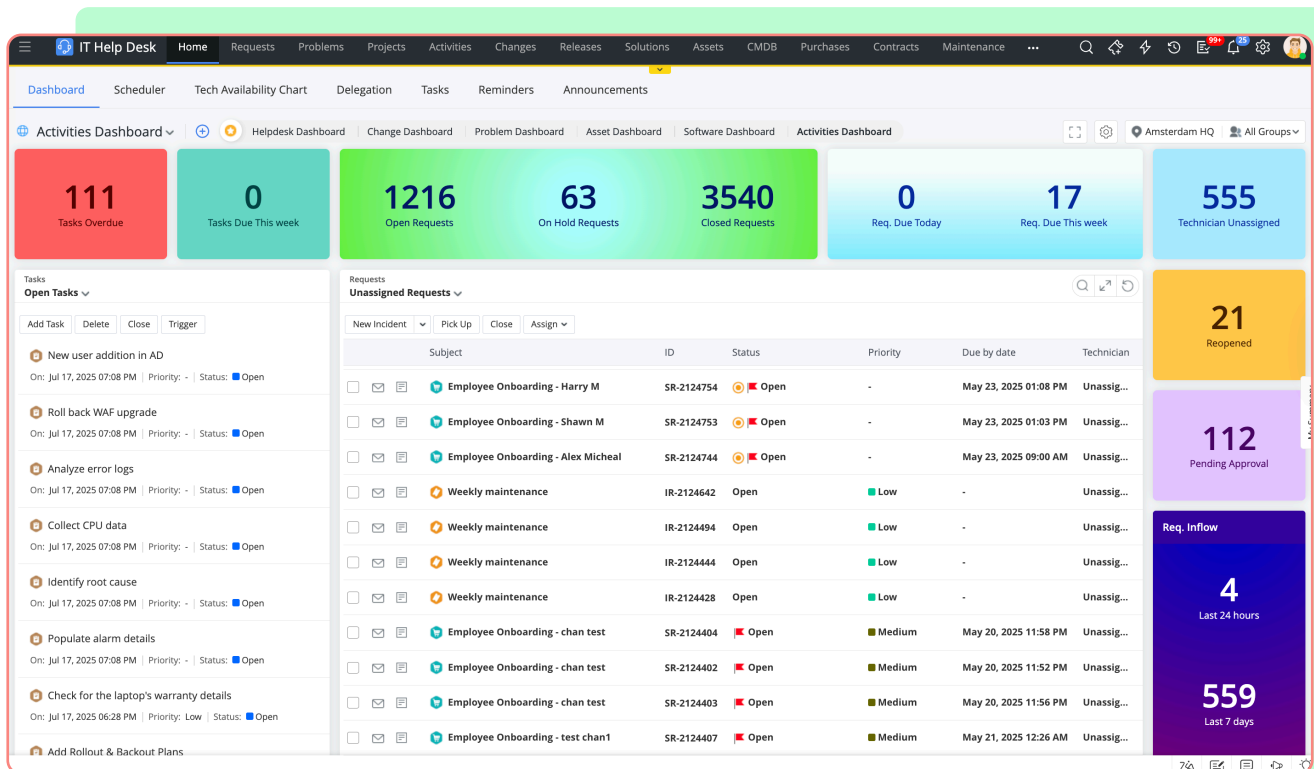
Folder Name	Owner	Reports	Access to Dashboard
> Frequently Asked Asset Reports	System	12	(9) Reports enabled
> Reports on Completed Releases	System	6	(1) Reports enabled
> Reports on Pending Releases	System	7	-
> Reports on All Releases	System	8	-
> Asset Loan	System	9	(5) Reports enabled
> Solutions	System	1	-
> Request Notifications	System	1	-
> Request Notes	System	1	-
> Archived Incidents Request	System	41	-
> Archived Service Requests	System	41	-
> All Archived Requests	System	41	-
> Request Assessment	System	14	-
> Projects	System	20	-

Out-of-the-box reports in ServiceDesk Plus

## b. Visualize onboarding progress and metrics through interactive dashboards

- Dashboards in ServiceDesk Plus give you a live view into onboarding operations. They consolidate KPIs into one screen, helping you track progress, spot delays, and take immediate action when things go off track.
- Use dashboards to monitor open, in-progress, and completed onboarding requests in real time, view department-wise task completion rates, track technician performance and task load distribution, and visualize SLA breaches across various onboarding categories.

- Custom dashboards allow you to tailor views to specific roles or priorities, with filters to drill down into data by location, employee type, or department.
- Enhance the dashboard further by adding custom widgets that are embeddable UI components to provide a unified, up-to-the-minute view of the entire onboarding journey. This widget aggregates real-time status updates from all related child tickets across departments, allowing stakeholders to monitor onboarding progress without toggling multiple instances.
- Enable SmartView to view individual onboarding tickets and take immediate actions, like updating task status or coordinating with other teams, without leaving the dashboard. This streamlines your workflow, eliminates context switching, and improves team responsiveness.



Dashboards in ServiceDesk Plus

## c. Capture employee feedback with targeted onboarding surveys

- Leverage the native Zoho Survey integration to build tailored onboarding surveys. Customize surveys by role or department to gather relevant, actionable feedback from new hires and departing employees. Design them to measure overall satisfaction with the onboarding experience, ease of access to IT resources and documentation, helpfulness and responsiveness of HR and IT teams, gaps in communication, provisioning delays, or unmet expectations.
- Automate survey distribution by linking them to completion triggers in your transition workflows.
- View and manage all survey responses seamlessly within the ServiceDesk Plus console.

The screenshot displays the Zoho Survey 'Edit Template' interface for an 'Employee onboarding survey'. The interface is divided into three main sections: a left sidebar, a central editor, and a right preview pane.

**Left Sidebar:** Contains a 'QUESTION TYPES' list with various question formats such as Multiple Choice (One Answer), Multiple Choice (Many Answers), Dropdown (One Answer), Dropdown (Many Answers), Image Selection, Rating Scale, Star Rating, NPS, Slider Scale, Continuous Sum, Ranking, Boolean (Yes/No), Matrix Choice (One Answer), Matrix Choice (Many Answers), Matrix Rating Scale, Matrix Star Rating, Matrix Dropdown, Matrix Grid, and Matrix Textbox. Below this list are tabs for 'SUMMARY', 'BUILDER', and 'AUDIT LOGS'.

**Central Editor:** Shows the survey content for 'Page 1'. It includes a title bar 'Employee onboarding survey' and a 'Logic' icon. The survey questions are as follows:

- Question 1: '\* How satisfied are you with your overall onboarding experience?' followed by five star icons for rating.
- Question 2: '\* Did you receive all the required IT equipment (laptop, phone, accessories) on time?' with radio button options for 'Yes' and 'No'.
- Question 3: 'What could have been improved in your onboarding experience?' followed by a large text input area.

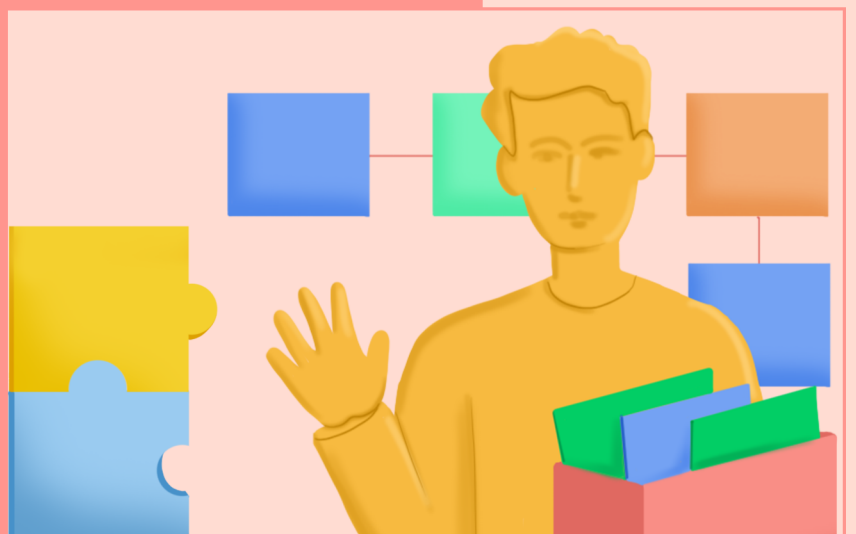
**Right Preview Pane:** Labeled 'PAGE (1)', it shows a preview of the survey page with a 'P 1' indicator and a plus sign for additional pages.

Sample employee onboarding survey

CHAPTER

# 07

**Break down silos and  
enable cross-department  
collaboration with  
enterprise service  
management**



Onboarding is inherently a cross-functional process. From setting up user accounts and provisioning devices to granting access to collaboration tools and collecting feedback, these onboarding and offboarding processes involve multiple systems and teams. Without strong integrations in place, these handoffs can easily become siloed, error-prone, or delayed. Therefore, to deliver seamless employee experiences and reduce operational overhead, your service management platform must connect effortlessly with the broader IT and business ecosystem.

ServiceDesk Plus offers a comprehensive suite of native integrations, out-of-the-box connectors, and robust APIs that help unify your ITSM processes with other IT and business systems.

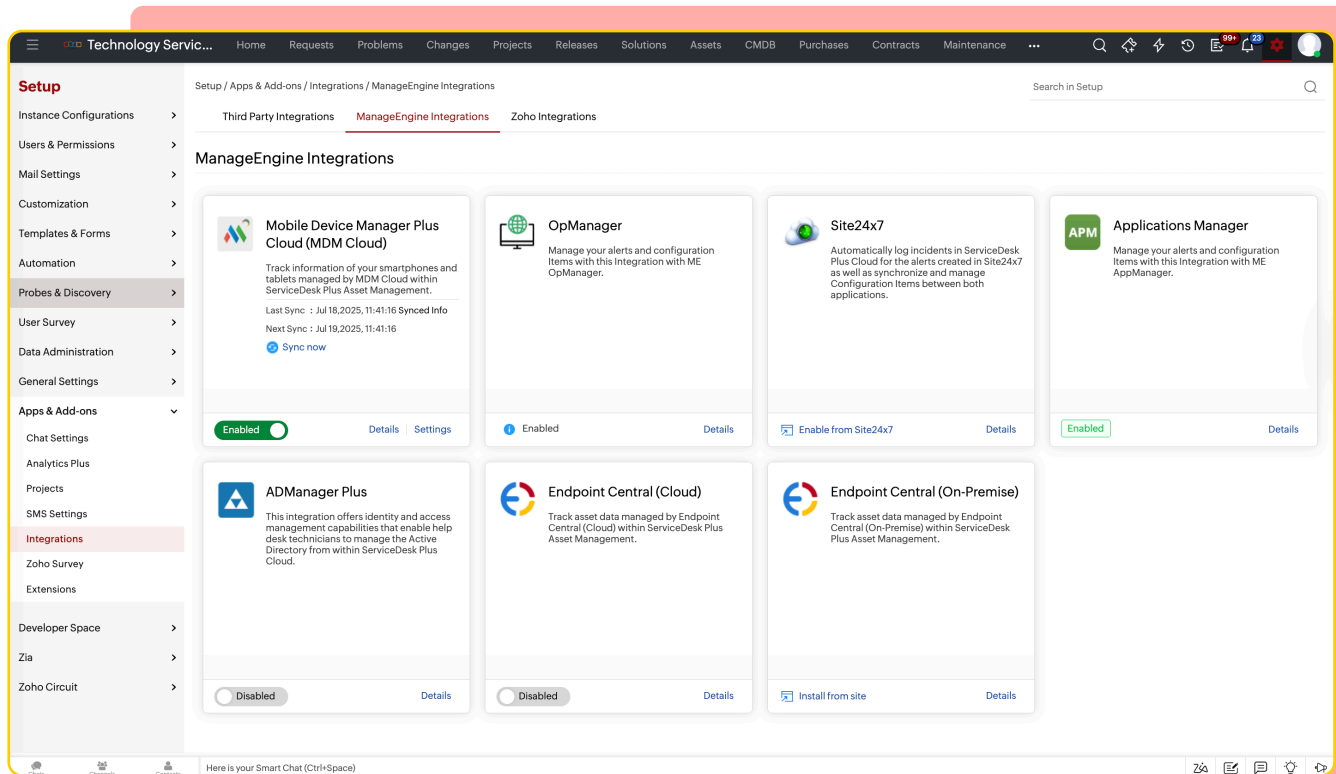
## **a. Simplify new hire and exit processes using seamless native integrations**

ServiceDesk Plus leverages powerful native integrations with ManageEngine tools to streamline and unify every IT touchpoint throughout the employee onboarding process, giving you complete visibility and control.

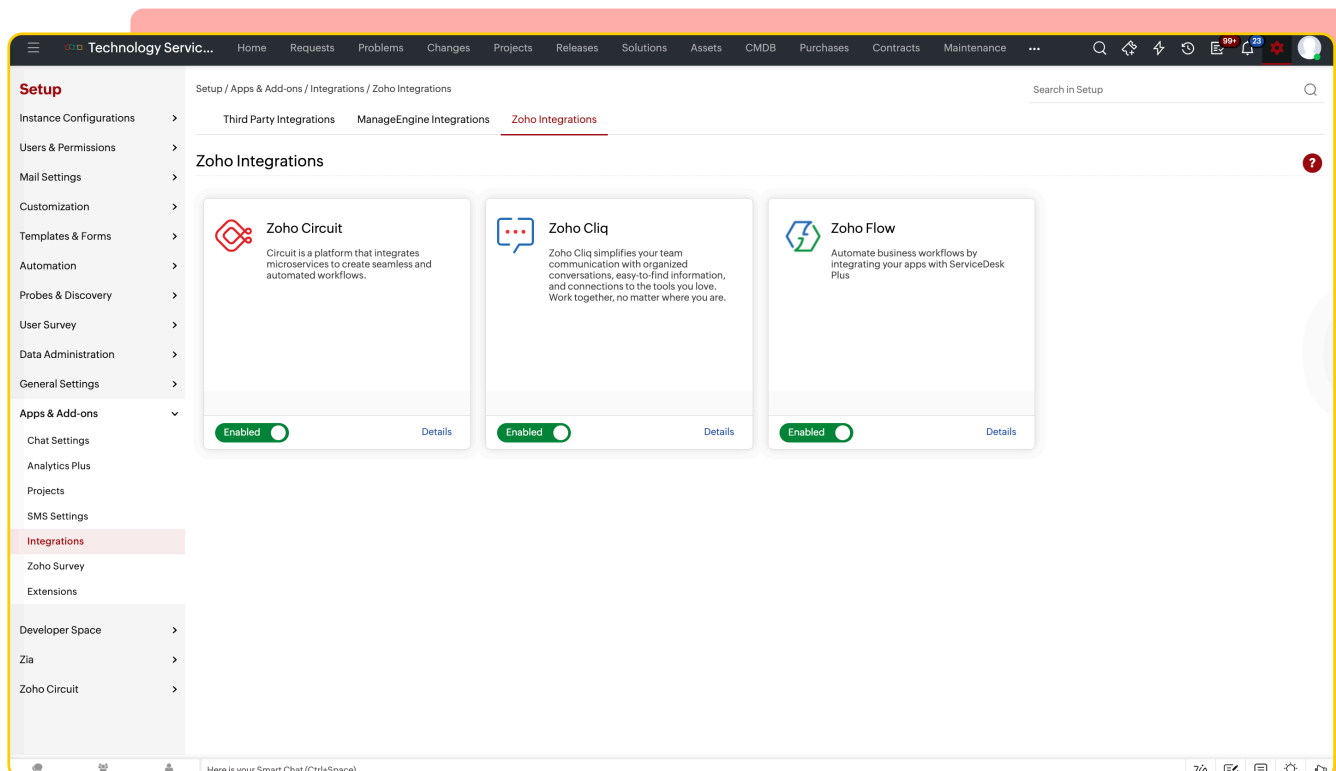
- **Endpoint Central:** Seamlessly manage endpoints by deploying software, enforcing patches, and troubleshooting devices remotely, ensuring ready-to-use workstations for new employees and securely wiped devices when employees exit.
- **Mobile Device Manager Plus:** Enforce security policies, manage apps, and control access on mobile devices issued during onboarding and offboarding.
- **ADManager Plus:** Automate Active Directory tasks such as user provisioning, adding individuals to specific groups, and deactivating accounts within transition workflows, ensuring timely and accurate access management.

- **PAM360:** Securely grant privileged account access as needed and promptly revoke permissions to protect critical systems throughout the employee life cycle.
- **ADSelfService Plus:** Empower users to reset passwords and unlock accounts independently, reducing IT dependency.
- **Password Manager Pro:** Safely store and share credentials among IT teams managing access rights and securely retire or transfer credentials as employees join or leave.
- **Analytics Plus:** Create custom reports and dashboards that provide insights into onboarding trends, helping optimize transition processes.
- **Zoho Survey:** Gather feedback post-transition to improve employee experience continually.
- **Zoho Flow:** Orchestrate service delivery at scale by building automated, cross-platform workflows that sync ServiceDesk Plus with other third-party cloud and on-premises applications, enabling smooth data exchange.





## ManageEngine integrations

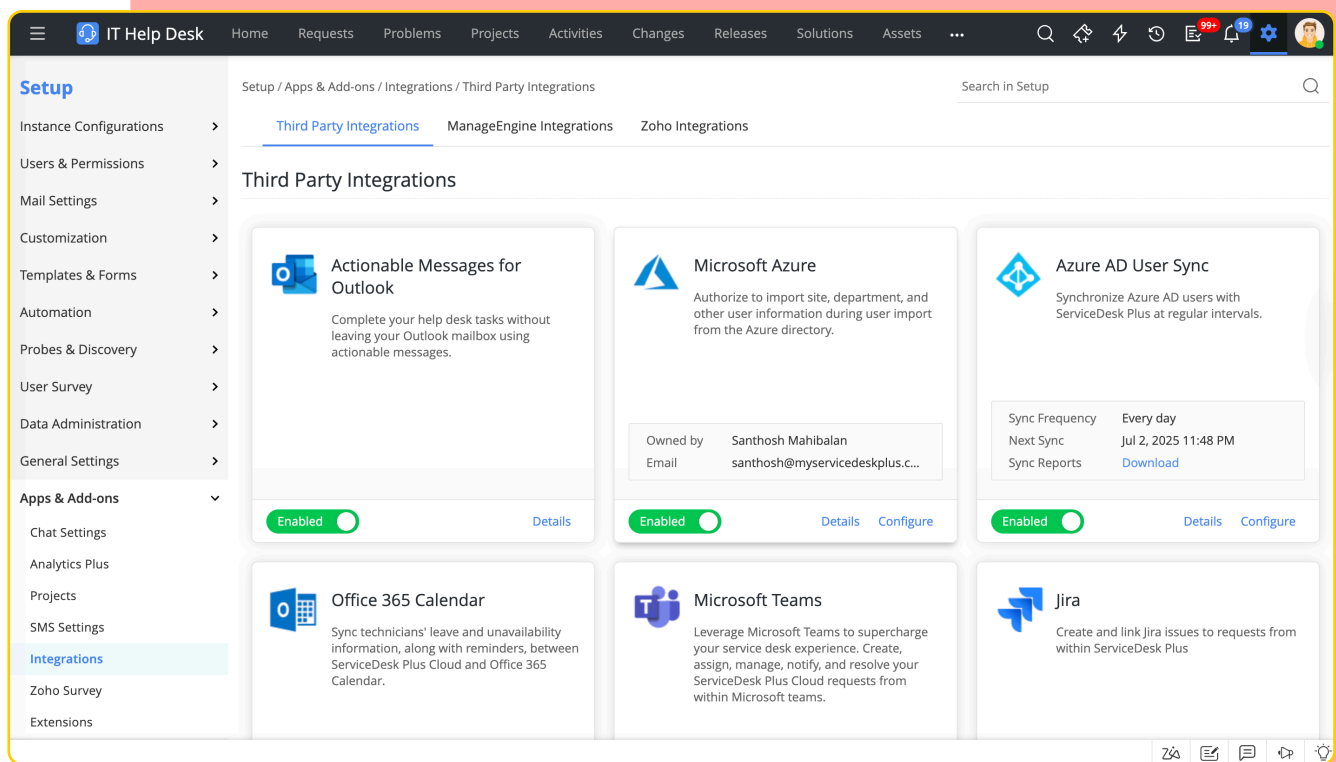


## Zoho integrations

## **b. Synchronize IT and business systems to deliver a unified experience**

Beyond IT operations, ServiceDesk Plus supports business application integrations that ensure onboarding efforts stay aligned with your broader digital ecosystem:

- Microsoft Teams: Empower employees to submit requests and track their progress directly within Teams, removing the need to switch between multiple applications and improving overall convenience.
- Microsoft Intune: Automatically register and monitor devices from the moment they are assigned.
- Microsoft Outlook and Microsoft 365: Enable users to create and manage requests directly from their email inbox, while IT teams gain easy access to OneDrive and SharePoint resources.
- JIRA: Seamlessly push requests into JIRA to facilitate collaboration with development teams or support hybrid workflows.
- Slack: Keep communication flowing by integrating ticket management and request updates directly within Slack channels, enabling instant collaboration.
- ChatGPT and Azure OpenAI: Equip technicians to create context-aware responses, notes, and updates within ServiceDesk Plus while also enabling employees to access relevant knowledge seamlessly through intelligent AI-powered search.
- REST APIs: Customize integrations, automate cross-platform workflows, and extend ITSM capabilities to meet your organization's unique operational needs.



## Support for third-party integrations in ServiceDesk Plus

# Bring clarity, consistency, and control to onboarding and offboarding with ServiceDesk Plus

Smooth employee onboarding and offboarding processes are vital to maintaining organizational security, boosting productivity, and fostering engagement. Yet managing these processes can quickly become overwhelming without the right tools in place.

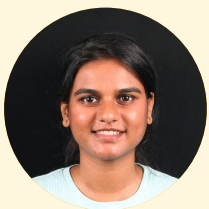
ManageEngine ServiceDesk Plus offers a unified, AI-driven service management platform that brings clarity and control to every stage of the employee journey. From orchestrating cross-functional tasks and enabling enterprise service management to aligning asset provisioning, powering intelligent automation, and offering seamless integrations, it empowers your teams to deliver consistent, efficient experiences without the usual headaches.

Experience the difference a streamlined employee onboarding and offboarding process can make. To explore ServiceDesk Plus, [request a demo](#) or start a with a [free, 30-day trial](#), and see how it can help your organization stay agile, secure, and ready for growth.

# About ServiceDesk Plus

ServiceDesk Plus is the unified service management platform from ManageEngine, the enterprise IT management division of Zoho Corporation. Built on industry-recommended ITSM best practices, ServiceDesk Plus comes packed with contextual IT and business integrations that help service desk teams better align with their organization's business objectives. With native enterprise service management capabilities and unrestricted extensibility offered through low-code scripting, ServiceDesk Plus helps organizations design, deliver, and support their business and IT services. It comes in three editions and is available in 37 different languages. To learn more about ServiceDesk Plus and its features, please visit [manageengine.com/service-desk](https://manageengine.com/service-desk).

## About the author



### **Bhuvaneshwari, marketing analyst**

With four years of experience as a content designer at leading EdTech firms, Bhuvaneshwari has a knack for developing insightful resources like videos, e-books, and articles. At ManageEngine, she now leverages this experience to develop best practice articles, blogs and how-to guides to help ITSM practitioners handle their everyday challenges better. With a sincere passion for exploring IT service management (ITSM) and expanding her knowledge horizons, she often immerses into articles on ITSM and its current trends. Outside the ITSM sphere, you can find her smiling at random illustrations, which she claims to be a whimsical source of joy.