New joiner IT access and equipment provisioning

Process Definition Document (PDD): template and worked example

Example company (fictional): Nordlys Software AB, a software company in Gothenburg, Sweden (about 340 employees).

Document control

Field	Value
Process name	New joiner IT access and equipment provisioning
Process owner	[Name, role]
Prepared by	[Name]
Reviewed by	[Names of the people who do the work]
Approved by	[Name, date]
Version	1.0 (as-is)
Status	Draft

How to use this template

This is a complete process definition document (PDD) for new joiner IT access and equipment provisioning, also called employee onboarding administration, new hire IT setup or joiner provisioning. It describes how HR, the hiring manager, the IT service desk, IT security and facilities get a laptop, accounts and a badge ready before a new employee's first day. The company is fictional, but the steps match what most mid-sized software and services firms do today.

Use it as a starting point. Replace the company details, keep the sections, and walk through each step with the service desk agents and the hiring managers who actually fill in the forms. Most companies change the role templates, the list of access that needs security approval and the lead time they promise before the start date. The overall structure stays the same.

- Replace the company and the systems with yours. If you have no ticketing tool, name the form or inbox where the request is raised.
- Define your role templates first. They decide how much access is granted automatically and how much needs approval.
- List which access needs security approval in step 10. Production, admin and finance access is common, but regulated industries add more.
- Check the lead time. If laptops take a week to arrive, the two-day target in step 16 is not realistic without ordering earlier.
- Decide who sends the first login details. Sending them through the manager is common, but it is also a frequent cause of late starts.

1. Purpose and scope

This procedure describes how Nordlys Software AB prepares IT access and equipment for a new employee, from the moment HR marks the contract as signed to the moment the joiner confirms on day one that the laptop, the accounts and the badge work. It gives HR, hiring managers, the service desk, IT security and facilities one shared description of who does what, so that every joiner starts with the right tools, no more access than the role needs, and a record of who approved what.

In scope

- Employees with a signed contract and a confirmed start date

- Accounts, mailbox, licences and group memberships
- Laptop purchase, preparation, enrolment and handover
- Access approvals for production, repository admin and finance systems
- Badge and desk allocation
- Day one handover and first login

Out of scope

- Recruitment and offer negotiation
- Contract terms and payroll setup
- Performance topics and probation reviews
- Contractors and consultants

2. Process at a glance

Item	Description
Trigger	HR marks a signed contract as ready for onboarding in Workday and sets a start date.
Starts when	The HR Administrator opens an onboarding request in ServiceNow.
Ends when	The joiner signs the equipment receipt on day one and the request is closed.
Inputs	Signed contract and start date in Workday, Role template, Laptop type and extra systems chosen by the manager, Laptop from stock or from the supplier, Security approval, where required
Outputs	User, mailbox and licence in Entra ID, Okta group memberships, Enrolled and encrypted laptop assigned to the joiner, Badge and desk, Signed equipment receipt, Closed ServiceNow request and final asset record
Volume	About 120 new joiners a year, with peaks in January and August
Working hours	Service desk Monday to Friday, 08:00 to 17:00. The target is to be ready two working days before the start date.

3. Roles and responsibilities

Role	Responsibilities
HR Administrator	Marks the contract as signed, sets the start date and opens the onboarding request in ServiceNow.
Hiring Manager	Chooses the role template, laptop type and extra systems, and hands over the first login details to the joiner.
IT Service Desk Agent	Creates the accounts, prepares and assigns the laptop, runs the test login, walks the joiner through first login and closes the request.
IT Security Officer	Approves or rejects requests for production, repository admin and finance access.
Facilities Coordinator	Creates the badge in Gallagher and assigns a desk in the Excel desk plan.
Equipment Supplier (external)	Delivers laptops that are not in stock, typically in 3 to 7 days.
New Joiner	Collects the laptop and badge on the start date and signs the equipment receipt.

4. Systems

- Workday: HR master record
- ServiceNow: requests, tasks, approvals and asset records
- Microsoft Entra ID and Microsoft 365: user, licence and mailbox
- Jamf and Intune: laptop enrolment and software
- Okta groups: GitHub, Jira and the AWS console
- Gallagher badge system and an Excel desk plan

5. Process map

Process diagram goes here

Draw one lane per role from section 3, the steps from section 6 in order, and a diamond for each decision in section 7.

6. Procedure, step by step

#	Step	Who	What happens	System	Output
1	Mark the contract as signed	HR Administrator	Marks the contract as signed in Workday and sets the start date. This takes about 2 minutes.	Workday	Joiner record ready for onboarding
2	Open the onboarding request	HR Administrator	Opens a request in ServiceNow, copying name, start date, department and manager by hand from Workday. This takes 10 to 15 minutes.	ServiceNow, Workday	Onboarding request
3	Fill in the manager form	Hiring Manager	Receives a task from ServiceNow to select the role template, the laptop type and any extra systems. The form takes about 10 minutes, and replies take 1 to 3 days.	ServiceNow	Completed manager form
4	Chase a late manager	IT Service Desk Agent	If the manager has not replied after 2 working days, ServiceNow sends a reminder and the service desk phones. This happens in about 30% of cases.	ServiceNow, phone	Manager form received
5	Check the form	IT Service Desk Agent	Checks the form. If the role template or a system name is missing, returns it to the manager. This rework loop affects about 20% of cases.	ServiceNow	Accepted form, or form returned
6	Check laptop stock	IT Service Desk Agent	Checks whether a suitable laptop is in stock. This takes about 3 minutes.	ServiceNow	Stock status
7	Reserve or order a laptop	IT Service Desk Agent	Reserves a laptop from stock. If none is suitable, raises a purchase request and waits for delivery. About 25% of cases need a purchase, mostly developer laptops.	ServiceNow	Reserved laptop, or purchase request
8	Create the user account	IT Service Desk Agent	Creates the user in Entra ID and assigns the licence and the mailbox. This takes 15 to 20 minutes.	Entra ID, Microsoft 365	User with mailbox and licence
9	Add to Okta groups	IT Service Desk Agent	Adds the user to the Okta groups defined by the role template. This takes 5 to 10 minutes.	Okta	Group memberships set
10	Request sensitive access	IT Service Desk Agent	If the request includes production, repository admin or finance access, sends an approval task to the IT Security Officer. About 15% of cases need it. Otherwise no approval is needed.	ServiceNow	Approval task, or none needed
11	Approve or reject	IT Security Officer	Approves or rejects in ServiceNow, normally within 1 to 2 days. If rejected (about 2% of cases), the manager changes the request and the agent resubmits.	ServiceNow	Approval decision

#	Step	Who	What happens	System	Output
12	Prepare the laptop	IT Service Desk Agent	Enrols the laptop in Jamf or Intune, installs the standard software and encrypts the disk. This takes 45 to 60 minutes.	Jamf, Intune	Enrolled, encrypted laptop
13	Tag and assign the laptop	IT Service Desk Agent	Tags the laptop and assigns it to the joiner in ServiceNow.	ServiceNow	Asset record assigned
14	Create badge and desk	Facilities Coordinator	Creates the badge in Gallagher and assigns a desk in the Excel plan. This takes about 10 minutes.	Gallagher, Excel	Badge and desk
15	Send login details to the manager	IT Service Desk Agent	Emails the manager the first login details to hand over. Nothing is sent to the joiner directly.	Outlook	Login details with the manager
16	Run a test login	IT Service Desk Agent	Runs a test login two working days before the start date. This takes about 10 minutes.	Entra ID, Okta	Tested accounts
17	Collect laptop and badge	New Joiner	Collects the laptop and badge on the start date while the agent walks through first login and multi-factor setup. This takes about 30 minutes.	Laptop, badge	Joiner logged in
18	Sign the equipment receipt	New Joiner	Signs the equipment receipt in ServiceNow.	ServiceNow	Signed receipt
19	Fix failing access	IT Service Desk Agent	If any access fails, opens an incident and fixes it the same day. This happens in about 18% of cases. Otherwise the request is closed.	ServiceNow	Incident resolved, or none needed
20	Close the request	IT Service Desk Agent	Closes the request. The asset record is now final.	ServiceNow	Closed request

7. Decision points and business rules

- Has the manager replied within 2 working days? No: ServiceNow sends a reminder and the service desk phones (step 4). About 30% of cases.
- Does the form include a role template and system names? No: the agent returns it to the manager (step 5). About 20% of cases.
- Is a suitable laptop in stock? No: the agent raises a purchase request and waits for delivery (step 7). About 25% of cases, mostly developer laptops.
- Does the request include production, repository admin or finance access? Yes: the IT Security Officer must approve it (step 10). About 15% of cases.
- Did the IT Security Officer reject the request? Yes: the manager changes it and the agent resubmits (step 11). About 2% of cases.
- Does any access fail on day one? Yes: the agent opens an incident and fixes it the same day (step 19). About 18% of cases.

8. Exceptions

- Start date moved (about 8% of cases): the agent updates the dates and rebooks the badge and the handover.
- Remote start in another country (about 5%): the laptop is shipped by courier and first login runs over video.
- Start cancelled after accounts exist (about 3%): the accounts are disabled and the laptop returns to stock.
- Username clash in Entra ID (about 2%): the agent creates a variant and informs the manager.

9. Controls

- Sensitive access needs IT Security Officer approval, recorded in ServiceNow.

- Role templates enforce least privilege, and extra rights need approval.
- Account and asset changes leave an audit trail in ServiceNow, Entra ID and Okta.
- Segregation of duties: the manager who requests access does not create the account.
- Disk encryption and enrolment are mandatory before handover, in line with ISO 27001.

10. Known issues today

- Workday data is retyped into ServiceNow, and errors in names or dates are common.
- The manager form is often late or incomplete, so the service desk chases.
- Developer laptops are often out of stock and the lead time exceeds the notice.
- Facilities sees the request late, so badges slip in peak months.
- First login details reach joiners late because they are routed through the hiring manager.

11. RACI matrix

R = responsible (does the work), A = accountable (owns the outcome), C = consulted, I = informed.

Activity	HR	Hiring Manager	Service Desk	IT Security	Facilities	Joiner
Open the onboarding request	A/R	I	I			
Select role template and systems	I	A/R	C			
Order or reserve the laptop		I	A/R			
Create accounts and group memberships		I	A/R			
Approve sensitive access		C	R	A		
Prepare and enrol the laptop			A/R	I		
Issue badge and desk	I	I	C		A/R	
Day one handover and receipt	I	C	A/R		I	R

12. KPIs

KPI	Definition	Target
Joiners fully ready on day one	Share of new joiners whose laptop, accounts and badge all work on the start date. Target 95%.	[set]
Days from request to all tasks closed	Average working days between the onboarding request being opened and the last task being closed.	[set]
Requests returned for incomplete data	Share of onboarding requests sent back to the manager because the role template or a system was missing.	[set]
Day one incidents per joiner	Number of access incidents opened on or after the start date, divided by the number of joiners.	[set]
Average wait for security approval	Working days between the approval task being sent and the IT Security Officer deciding.	[set]

13. Revision history

Version	Date	Author	Change
1.0	[date]	[name]	First as-is version

Free template from processfix.ai. You may copy and adapt it. The company in the example is fictional.