Onboarding user guide

Overview

Whenever a new employee starts or when a state employee changes positions, the hiring agency must submit an onboarding request to ensure the employee receives the necessary equipment, access and software to perform their job. This guide walks through the process of completing the onboarding form.

Note: You may be asked a few additional questions depending on for which agency you work. Please answer accordingly.

Steps

Step 1: Go to the following website: oklahoma.gov/servicedesk

Step 2: Select the **Login** link within the Support Portal section.
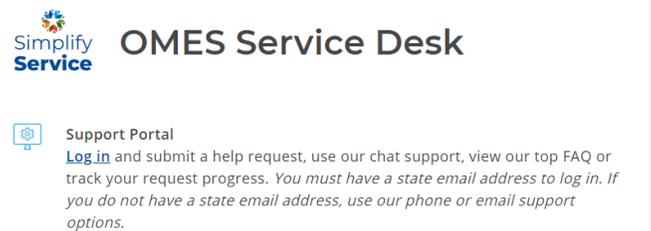
Step 3: The ServiceNow login page will appear. Enter your state email address and select the **Submit** button.
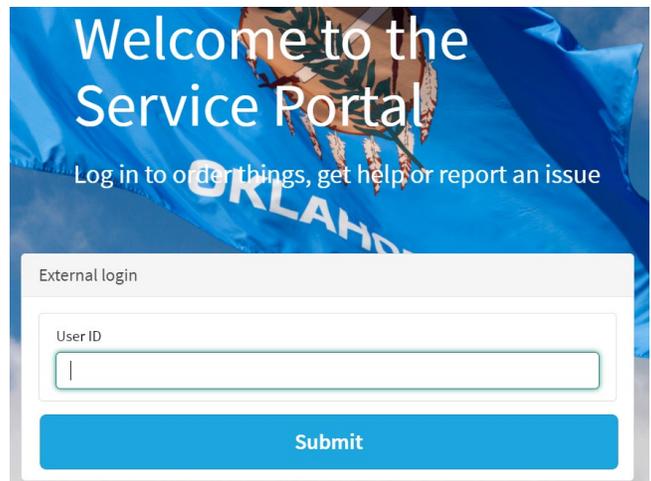
Step 4: Login with your organizational account.

Sign in with your organizational account

jane@omes.ok.gov

Password

Sign in

The Service Desk Home Page appears.

If you do not see the screen above when you login, it means you have a different level of access. You need to go to the following website: https://oklahoma.service-now.com/sp

Step 5: Locate the Employee On and Offboarding box. Select **Employee Onboarding**.

Employee On and Offboarding

Complete the onboarding or offboarding request form.

Employee Onboarding
Employee Offboarding
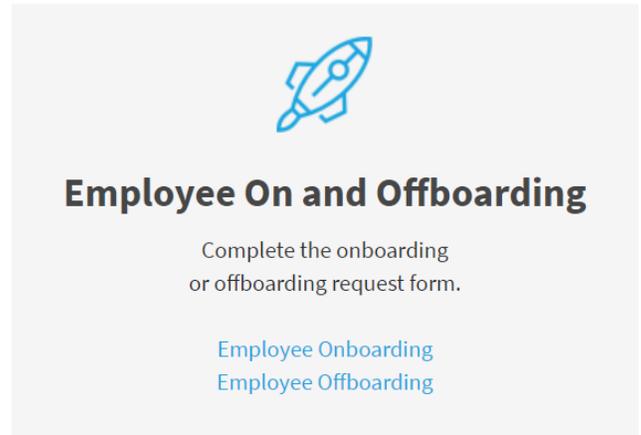
The OMES Onboarding Request screen will appear. This is where you will enter the information for the onboarding employee.

Note: Fields with a red asterisk are required.

Home > **Employee Onboarding**

Employee Onboarding
Provide access to technology applications and devices to get started as a new employee.

Use this for OMES Onboarding Request

* Indicates required
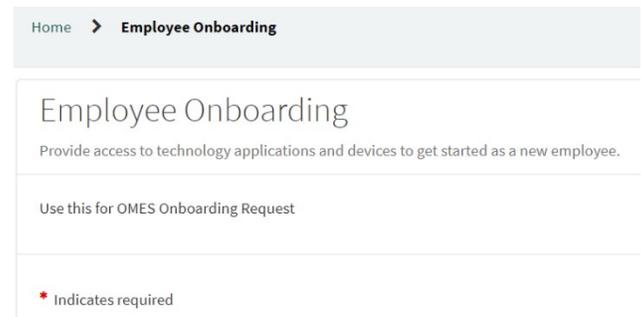
Step 6: Select their agency from the dropdown. If you type part of the agency name, the system will populate or narrow down your selections.

*Agency

▼

Step 7: Select their department from the dropdown.

Department

▼

Step 8: Select the employee type from the dropdown. Are they a state employee, contractor, board member or Workday only?

*Employee Type

-- None --

▼

Step 9: Enter the onboarding employee's first name, middle initial and last name into the appropriate fields.

Employee details

*Employee First Name

Employee Middle Initial

*Employee Last Name

Step 10: Enter or select the employee's start date.

*Employee Start Date

| |

Step 11: If they are a state employee, enter their employee ID. Enter their Workday employee ID (DHS U# is not considered a valid employee ID).

*Employee ID ❓

Step 12: Is this employee/contractor a transfer from another state agency? Select **Yes** or **No** from the dropdown.

Is this employee/contractor a transfer from another State Agency?

-- None -- ▾

Step 13: If **YES** is selected for transfer, select the agency from the dropdown.

What Agency?

▾

Select the end date of employment for their previous agency.

End date of employment at above Agency:

📅

Step 14: Does the employee need printer access? Select **Yes** or **No** from the dropdown.

Printer Access Needed

-- None -- ▾

If **Yes** is selected, a Printer IP Address field will appear. Enter the printer's IP address. This can be found on your computer's Printer Properties screen.

* Printer IP Address

Step 15: Does the employee need a scan folder? Select **Yes** or **No** from the dropdown.

Scan Folder Needed

-- None -- ▾

If **Yes** is selected, enter the IP address for the scanner or multifunction device. This could be the same as the Printer IP Address above.

Scanner IP Address

Step 16: Does the employee need a phone setup? Select **Yes** or **No** from the dropdown.

Phone Setup Needed

-- None -- ▾

If **Yes** was selected, additional phone-related fields will appear. Select the type of phone from the dropdown. This includes a desk phone, a Teams soft phone, In Contact or Reuse existing phone number. If there is a phone number that needs to be reassigned, enter it into the Phone Number field. Any other intructions or details regarding the onboarding employee's phone situation can be entered into the Special Phone Instructions field. Examples of special instructions include needing phone calls forwarded to a phone number or adding the employee to a call group.

Phone Setup Needed

Yes ▾

Type of Phone Service

Reuse existing phone number ▾

Need name change?

-- None -- ▾

Voicemail passcode reset?

-- None -- ▾

Phone Number

Special Phone Instructions

Step 17: In the Workstation Inventory Type field, select whether the employee will use an existing workstation, if a new one is needed, virtual workstation or none. Select **None** if you do not need any type of support in getting computer setup, i.e. print drivers/software installed. If you select **Use Existing**, you will be contacted by a computer support technician to install print drivers and/or software.

* Workstation Inventory Type

| -- None -- | ▲ |

| | 🔍 |

-- None --

Use Existing

Order New Computer

Virtual

None
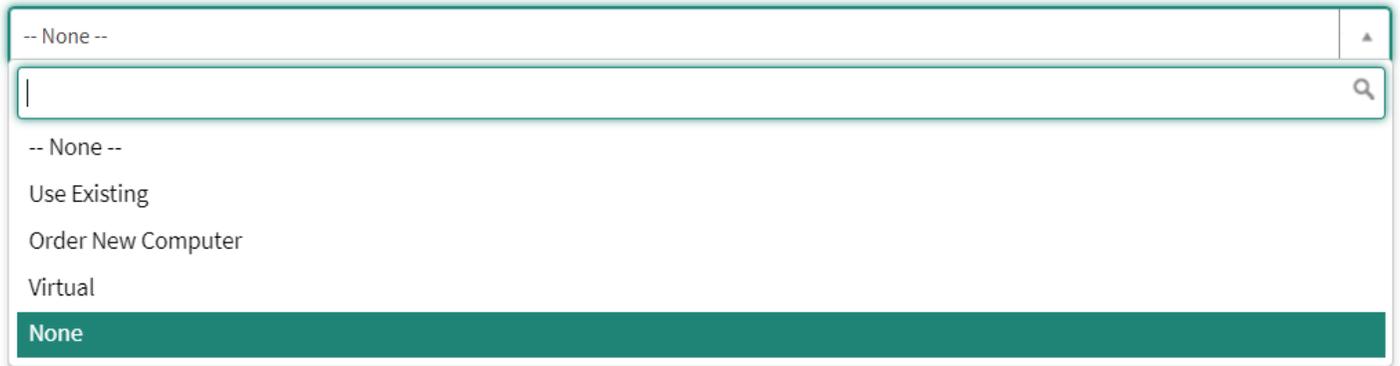
If **Order New Computer** was selected, a window will appear reminding you to use the COW portal to place a new order.

Enter COW Number   ✕

Please make sure you use the COW portal to place a new order. If requesting for New workstation, please fill COW number from COW portal

Ok

Once you have a COW REQ number from the COW portal, enter the COW REQ number into the appropriate field.

Enter COW Number ❓

Please make sure you use the COW portal at to place a new order. If requesting for New workstation, please fill COW number from COW portal.   ✖

Step 18: Does the new employee need to have their Active Directory (AD) account setup similar to a current employee? This means they will require similar permissions. This does NOT apply to email groups/SharePoint sites/calendars. This is only for Active Directory. Select **Yes** or **No** from the dropdown.

Setup like Another User

| -- None -- | ▼ |

If **Yes** was selected, enter the name of the current employee whose setup should be copied into the Setup User to Copy field.

Setup User to Copy

Step 19: Does the employee need network folder access? If yes, enter the specific server name and folder name.

Network Folder Access ❓

> Please provide specific server name and folder name. Default permissions is Read Only. If you need read / write, please indicate as such. ✖

Step 20: Does the new employee need access to a shared mailbox? Select **Yes** or **No** from the dropdown. If **Yes** was selected, enter the mailbox into the What Mailbox field.

* Shared Mailbox needed?

| -- None -- | ▾ |

What Mailbox?

Step 21: Does the employee need any software outside of the standard image? The standard image includes Microsoft Office 365 and Adobe Reader. If additional software is needed, enter it into the Requested Software field.

Requested Software

Step 22: Does the employee need mobile device management? This is required if a state cell phone will be provided. Select **Yes** or **No** from the dropdown.

Needs Mobile Device Management?

| -- None -- | ▾ |

Step 23: The Please Provide Any Special Instructions field is a free form field allowing you to enter in anything else that is needed. Examples include being added to a special Active Directory group, shared calendar access, email distribution groups or needing access to a software application that requires permissions not listed above.

Please Provide Any Special Instructions

Note: If the new employee/contractor needs an Admin account, please submit a separate request for this permission. It will have to be vetted.

Step 24: Select the **Add attachments** link at the bottom of the form to add any necessary attachments to the onboarding request.

 Add attachments

Step 25: When complete, select the **Order Now** button to submit the onboarding ticket to be created and routed to the proper team for processing.

Quantity: 1 ▾

Delivery Time: 0 Days

Order Now

Step 26: An Order Confirmation window will appear. Enter any necessary delivery information or special instructions. Then select the **Checkout** button.

Order Confirmation ✕

Request for ⓘ

Joshua Graves ▾

⊞ Delivery Information (Optional)

⊞ Special instructions (Optional)

Cancel Checkout

You will receive a confirmation that your request was submitted, including your request number and estimated delivery date.

Home ❯ Request Summary   Search 🔍

Submitted : 02/18/2022 13:20:01
Request Number : **REQ0010088**
Estimated Delivery : 02/18/2022

Item	Delivery Date	Stage	Price (each)	Quantity	Total
OMES Onboarding Request	02/18/2022		---	1	---

Total: $0.00