

Human Resources: Practice Project #3

In this activity, you will be setting up a Sys.tm Flow to help automate the Human Resources employee offboarding process. This flow will move the employee's application to an Inactive Employees folder, notify HR to end benefits and payroll, notify IT to revoke system access, and automatically change the employee's status as Inactive Employee

1. Log into Sys.tm at www.sys.tm/signin or create an account with a free 30 day trial at www.sys.tm/signup.
2. Before starting this project, make sure you have downloaded the HR Sample Documents. [Click here](#) to access and download the sample documents you will be using for the Human Resources Projects. If you have already downloaded these files, you do not need to repeat these steps.
 - a. When downloaded, navigate to the **HR-Sample-data.zip** file on your PC
 - b. Right-click on the **ZIP file** and choose **Extract All**
 - c. When prompted to choose a location to save the extracted files, navigate to your **desktop** and click **Extract**. Or you can click **Extract All** in the file explorer **toolbar**

Create a Flow for Offboarding/Separation:

1. On the Dashboard under Features, click **Flows**.
2. Duplicate the HR - Onboarding Flow.
 - a. Click the three dots for the **HR – Onboarding Flow** and select **Copy**.
 - b. For **Name**, replace **HR – Onboarding – Copy** with **HR – Offboarding**.
 - c. Click **Create**.
3. Delete the Create Applicant Folder Activity.
 - a. Click the three dots for the **Create Applicant Folder** activity and select **Delete**.
 - b. When prompted, click **Delete** again to confirm.
4. Edit the Move Application to Active Employees Folder activity.
 - a. Click the three dots for the **Move Application to Active Employees Folder** activity and select **Properties**.
 - b. Click the **General** tab.
 - i. For **Name**, replace **Move Application to Active Employees Folder** with **Move Application to Inactive Employees Folder**.
 - c. Click the **Files/Folders** tab.
 - i. For **Source File(s)**, click the **X** to remove **#[FileIds]**.
 - ii. For **Source Folder(s)**, click the **X** to remove **#[FolderIds]**.
 - iii. For **Source Path(s)**, click the **Add Folder(s)** icon.
 1. Click **HR Documents**.
 2. Select the checkbox next to **Active Employees**.
 3. Click **Add Folder**.

- iv. Double click the value in **Source Path(s)** to edit it.
 1. After **/HR Documents/Active Employees/**, paste **@[Metadata/Applicant Name]/**
 2. Click **OK** to close the Configure Dynamic Value window.

NOTE: The **Source Path(s)** box should be the following:
/HR Documents/Active Employees/@[Metadata/Applicant Name]/
- v. For **Destination Folder**, click the **X** to remove **@[Create Applicant Folder/LastCreatedFolderID]**.
- vi. Click the **Add Folders** icon.
 1. Navigate to the **Human Resources** folder.
 2. Select the checkbox for the **Inactive Employees** folder.
 3. Click **Add Folder**.
- d. Click **OK** to close the properties window.
5. Delete the Sign Employment Agreement activity.
 - a. Click the three dots for **Sign Employment Agreement** and select **Delete**.
6. Edit the HR Notification Activity.
 - a. Click the three dots for the **HR Notification activity** and select **Properties**.
 - b. Click **Instructions** tab.
 - i. Remove the text in the editor box and copy or paste the following: **This email is to inform you that <employee>'s employment with the company has ended, effective <date>. Please proceed with the necessary actions to discontinue payroll and benefits. Let me know if any additional information is needed.**
 - c. Replace **<employee>** with the applicant's name.
 - i. Delete the word **<employee>** from the paragraph in the text editor.
 - ii. Click the **Variables** button.
 - iii. Under Property Bag Variables, click **Applicant Name**.
 - d. Replace **<date>** with the time the Flow was started.
 - i. Delete the word **<date>** from the paragraph in the text editor.
 - ii. Click the **Variables** button.
 - iii. Under Instance Variables, click **Started Date/Time**.

NOTE: The final paragraph should look like this:

This email is to inform you that @[Metadata/Applicant Name]'s employment with the company has ended, effective #[Started]. Please proceed with the necessary actions to discontinue payroll and benefits. Let me know if any additional information is needed.

- e. Configure the notification for task participants.
 - i. Click the **Notifications** tab.
 - ii. Edit the **Subject** to say **Action required: Stop Payroll and Benefits**.
 - iii. In the Text Editor, delete the text, then copy or paste the following:
Please stop payroll and benefits for employee
 - iv. Place a spacebar after the word employee, then click the **Variables** button.
 1. Click **Applicant Name**.

- v. Hit **Enter** on the keyboard to move to the next line.
 - vi. Click the **Start Task** button.
 - f. Create a checkbox indicating that HR has stopped payroll and benefits.
 - i. Click the **Selections** tab.
 - ii. Edit the existing checkbox.
 - 1. Click the three dots next to **Started Payroll/Benefits** and select **Edit**.
 - 2. For **Name**, replace **Started Payroll/Benefits** with **Stopped Payroll/Benefits**.
 - 3. For **Property Bag Name**, replace **Started Payroll/Benefits** with **Stopped Payroll/Benefits**.
 - 4. For **Description**, delete the existing text, then copy or paste the following: **Payroll and benefits have been stopped for this employee..**
 - 5. Click **Save** to close the Edit Selection window.
 - g. Click **OK** to close the HR Notification - Properties window.
- 7. Edit the IT Notification Activity.
 - a. Click the three dots for **IT Notification** and select **Properties**.
 - b. Click **Instructions** in the left column.
 - i. Remove the text in the editor box and copy or paste the following: **This email is to inform you that <employee>'s employment with the company has ended, effective <date>. Please proceed with the necessary actions to collect equipment and revoke system access. Let me know if any additional information is needed.**
 - c. Replace <employee> with the applicant's name.
 - i. Delete the word <employee> from the paragraph in the text editor.
 - ii. Click the **Variables** button.
 - iii. Under Property Bag Variables, click **Applicant Name**.
 - d. Replace <date> with the time the Flow was started.
 - i. Delete the word <date> from the paragraph in the text editor.
 - ii. Click the **Variables** button.
 - iii. Under Instance Variables, click **Started Date/Time**.

NOTE: The final paragraph should look like this:

This email is to inform you that @[Metadata/Applicant Name]'s employment with the company has ended, effective #[Started]. Please proceed with the necessary actions to collect equipment and revoke system access. Let me know if any additional information is needed.

- e. Configure the notification for task participants.
 - i. Click the **Notifications** tab.
 - ii. Edit the Subject to say **Action required: Revoke Access**.
 - iii. In the Text Editor, delete the text, then copy or paste the following:
Please collect equipment and revoke system access for employee
 - iv. Place a spacebar after the word employee, then click the **Variables** button.
 - 1. Click **Applicant Name**.

- v. Hit **Enter** on the keyboard to move to the next line.
 - vi. Click the **Start Task** button.
 - f. Create a checkbox indicating that IT has revoked system access.
 - i. Click the **Selections** tab.
 - ii. Edit the existing checkbox.
 1. Click the three dots for **Setup System Access & Equipment** and select **Edit**.
 2. For **Name**, replace **Setup System Access & Equipment** with **Collect Equipment and Revoke System Access**.
 3. For **Property Bag Name**, type **Collect Equipment/RevokeAccess**.
 4. For **Description**, delete the existing text, then copy or paste the following: **Equipment has been collected and system access has been revoked for this employee**.
 5. Click **Save** to close the Edit Selection window.
 - g. Click **OK** to close the IT Notification - Properties window.
 8. Configure Set Metadata for Inactive Employee status.
 - a. Click the three dots for the **Set Metadata activity** and select **Properties**.
 - b. Click **Mapping** in the left column.
 - i. For **Employee Status**, change the **Dynamic Value** from **Active** to **Inactive**.
 - c. Click **OK** to close the properties window.
 9. Save and Publish the HR – Offboarding Flow.
 - a. Click the **Save** icon on the top right of the Flow Designer window.
 - b. In the popup window asking if you would like to save and publish the Flow, click **Yes**.
 - c. An additional popup window will appear, asking “Your flow definition is not currently enabled, meaning no new instances will be created. Do you want to enable it now?”. Click **Yes**.

Testing the HR – Offboarding Flow:

1. Return to the dashboard.
2. On the Dashboard under **Features**, click **Files**.
3. Navigate to your **HR Documents – Active Employees – Holly Halford** folder.
4. Select the checkbox for **Holly-Halford-Job-Application.pdf**.
5. On the right, click **Start Flows**.
 - a. Select the checkbox for **HR – Offboarding Flow**.
 - b. Click **Start**.
6. Check your email for the **HR and IT notification emails**. Complete the tasks as instructed. It may take a few minutes for them to arrive in your inbox.