



CUSTOMER DOCUMENTATION SAMPLE

Employee Lifecycle Runbook

Repeatable joiner role change and offboarding procedures with approvals and closure evidence

Prepared for Harborlight Design Studio | Fictional demonstration environment

This runbook coordinates the customer and TTCO steps required when an employee joins, changes responsibilities, or leaves. It is designed to protect access while preserving the organization's work and creating a reviewable closure record.

Document Control

CLASSIFICATION	Public fictional sample	VERSION	1.0
DOCUMENT OWNER	Tyler's Tech Company	EVIDENCE DATE	September 5 2026
REVIEW CADENCE	Quarterly and after material change	SAMPLE STATUS	Public fictional example

How to read status labels Verified, Customer confirmed, Provider reported, Planned, Out of scope, and Not verified show how evidence would be classified in a live customer document. All facts and statuses in this public sample are fictional.

Required Request Information

Input	Required detail	Owner
Employee event	Joiner role change leave or temporary access change	Authorized customer contact
Effective time	Date time and urgency including any preservation instruction	Authorized customer contact
Business role	Department manager and approved access profile	Hiring or department manager
Equipment	Assigned standard device accessories and work location	Manager and TTCO
Applications	Standard access plus specifically approved exceptions	Manager and application owner
Data handling	Ownership transfer retention legal hold or mailbox instructions	Authorized customer contact

Credentials are never sent in this record. Initial sign-in and recovery information follow the approved secure delivery process.

Joiner Procedure

Step	Action	Responsible	Completion evidence
1	Confirm authorization effective date manager role work location and standard access profile	Customer	Approved request



Step	Action	Responsible	Completion evidence
2	Create the named identity and apply required license and baseline security settings	TTCo	Administrative readback
3	Assign standard groups shared resources and applications; record approved exceptions	TTCo	Membership and license readback
4	Prepare enroll and update the assigned device using the approved build standard	TTCo	Device management check-in
5	Deliver the device and secure first-sign-in instructions through the approved method	TTCo and manager	Handoff record
6	Verify sign-in multifactor enrollment email files required applications printing and remote-work access	Employee and TTCo	First-day verification
7	Close the request with asset assignment exceptions and unresolved items	TTCo	Closure note

Role Change Procedure

1. Confirm the former role, new role, effective time, manager, and approving application owners.
2. Compare existing access with the new role profile. Identify access that should be added, retained temporarily, or removed.
3. Apply approved changes and record any exception with its owner and review date.
4. Verify access to required systems and removal from former-role resources.
5. Update the employee and asset records, then close the request with evidence.

Control question	Sample answer
Does the request name an authorized approver	Yes before administrative work begins
Is former-role access removed or time bounded	Required unless a documented exception is approved
Are elevated roles reviewed separately	Yes privileged access requires named approval and evidence
Is shared-account use accepted	No named individual access is the default

Offboarding Procedure

Timing	Action	Responsible	Evidence
Before effective time	Confirm authorization exact timing urgency ownership transfer and preservation requirements	Customer	Approved departure request
At effective time	Block sign-in revoke active sessions and remove privileged access according to the approved sequence	TTCo	Identity readback
At effective time	Remove remote access business application access and managed device trust as applicable	TTCo and vendors	Access and vendor confirmation



Timing	Action	Responsible	Evidence
Same business day	Secure return or remote lock instructions for company equipment	Customer and TTCO	Asset custody record
Same business day	Apply approved mailbox file and application ownership transfer	TTCO and data owner	Delegation and ownership readback
After retention decision	Adjust licenses aliases forwarding retention and data disposition only as authorized	TTCO	Administrative readback
Closure	Record completed steps exceptions open vendor actions and next review date	TTCO	Closure record

Exception and Escalation Rules

- Immediate or sensitive departures use the authorized urgent path and the exact effective time supplied by the customer.
- A legal hold or preservation instruction pauses ordinary deletion or reassignment until the authorized owner gives direction.
- Missing approval, unclear data ownership, or conflicting instructions stop the affected step and create an open item.
- Vendor actions remain Provider reported until TTCO or the customer receives and records completion evidence.
- A device that cannot be recovered follows the lost-device and incident process rather than being marked complete.

Closure Checklist

Closure item	Required record
Authorization	Approver and effective time recorded
Identity	Account state sessions and privileged roles read back
Applications	Covered access removed changed or documented as an exception
Data	Ownership retention forwarding and preservation actions recorded
Equipment	Custody return lock wipe or exception recorded
Licensing	License state and later review date recorded
Open items	Owner target and dependency recorded for every unresolved step

Sample Closure Record

SAMPLE-EMP-1001 closed September 5 2026. Identity and covered application steps are marked Verified in the fictional record. Laptop return is Customer confirmed. One vendor license removal remains Provider reported and is assigned to the operations manager for follow-up.

Revision History

Version	Date	Change	Prepared by
1.0	September 2026	Public sample release	Tyler's Tech Company