

Setup Guide: Automated Employee Onboarding & Offboarding System

This guide provides a step-by-step procedure for configuring the Automated Employee Onboarding and Offboarding solution in a ServiceNow Personal Developer Instance (PDI)

1. Prerequisites

Before beginning, ensure the following are available:

- ServiceNow PDI with Administrator access.
- Basic knowledge of Service Catalog, Flow Designer, and Table structures.

2. Implementation Sequence

1. **Custom Table Setup:** Create the **Employee Lifecycle** table to store request history.
2. **Catalog Item Creation:** Configure the "Onboard / Offboard Employee" item.
3. **Variable Configuration:** Add mandatory variables and UI policies.
4. **Flow Designer Automation:** Build the approval and task assignment logic.
5. **Security Setup:** Configure Roles and ACLs.
6. **End-to-End Testing:** Validate the submission and fulfillment process.

3. Custom Table Configuration

Table Name: u_employee_lifecycle

Navigation: System Definition → Tables → New

Field Label	Type	Reference / Details
Request Type	Choice	Onboarding, Offboarding

Employee ID	String	Unique Identifier
Department	Reference	cmn_department
Joining/Exit Date	Date	Effective Date
Manager	Reference	sys_user
Assets	List	Hardware items
Status	Choice	Pending, In Progress, Completed

ServiceNow Employee Lifecycle

Table - Employee Lifecycle

Label: Employee Lifecycle

Name: u_employee_lifecycle

Application: Global

Columns Controls Application Access

Table Columns for text Search 1 to 15 of 15 New

Column label	Type	Reference	Max length	Default value	Display
Created by	String	(empty)	40	false	false
Requested for	Reference	User	32	false	false
Sys ID	Sys ID (GUID)	(empty)	32	false	false
Request type	Choice	(empty)	40	false	false
Employee ID	String	(empty)	40	false	false
Exit date	Date	(empty)	40	false	false
Status	Choice	(empty)	40	false	false

ServiceNow Employee Lifecycle

Table - Employee Lifecycle

Table Columns for text Search 1 to 15 of 15 New

Created by	String	(empty)	40	false	false
Requested for	Reference	User	32	false	false
Sys ID	Sys ID (GUID)	(empty)	32	false	false
Request type	Choice	(empty)	40	false	false
Employee ID	String	(empty)	40	false	false
Exit date	Date	(empty)	40	false	false
Status	Choice	(empty)	40	false	false
Created	Date/Time	(empty)	40	false	false
Manager	Reference	User	32	false	false
Department	Reference	Department	32	false	false
Updated by	String	(empty)	40	false	false
Updates	Integer	(empty)	40	false	false
Joining date	Date	(empty)	40	false	false
Updated	Date/Time	(empty)	40	false	false
RITM	Reference	Requested Item	32	false	false
Insert a new row...					

ServiceNow

Table - Employee Lifecycle

Delete Update Delete All Records

Related Links

- [Form Builder](#)
- [Design Form](#)
- [Layout Form](#)
- [Layout List](#)
- [Show Form](#)
- [Show List](#)
- [Show Schema Map](#)
- [Add to Service Catalog](#)
- [Run Point Scan](#)
- [Explore REST API](#)

Access Controls (4) Security Data Filters Labels (1) Database Indexes (5) Table Subscription Configuration (1) Action Inputs

Name Search

Actions on selected rows...

Name	Decision Type	Operation	Type	Active	Updated by	Updated
u_employee_lifecycle	Allow If	delete	record	true	admin	2025-12-26 21:47:05
u_employee_lifecycle	Allow If	read	record	true	admin	2025-12-26 21:47:05
u_employee_lifecycle	Allow If	create	record	true	admin	2025-12-26 21:47:05
u_employee_lifecycle	Allow If	write	record	true	admin	2025-12-26 21:47:05

4. Service Catalog & Variables

Create a new Catalog Item named **Onboard / Offboard Employee**.

Variable Settings:

- **Request Type:** Choice (Mandatory).
- **Employee ID:** Single-line Text (Mandatory).
- **Joining/Exit Date:** Date (Mandatory).
- **UI Policies:** Implement conditional logic to change labels (e.g., show "Joining Date" for Onboarding and "Exit Date" for Offboarding).

ServiceNow Catalog Items

Build and modify items faster with the improved [Catalog Builder](#).

Name: On or Off Boarding Application: Global

Service Catalog Active: ☒

Category: Services Roles: [Edit](#)

State: -- None -- Fulfillment automation level: Unspecified

Checked out: -- None --

Owner: System Administrator

Item Details Process Engine Picture Pricing Portal Settings

Short description

Description

ServiceNow Catalog Item - On or Off Boarding

Related Links

- [Item Diagnostic](#)
- [Show VA render type](#)
- [Run Point Scan](#)

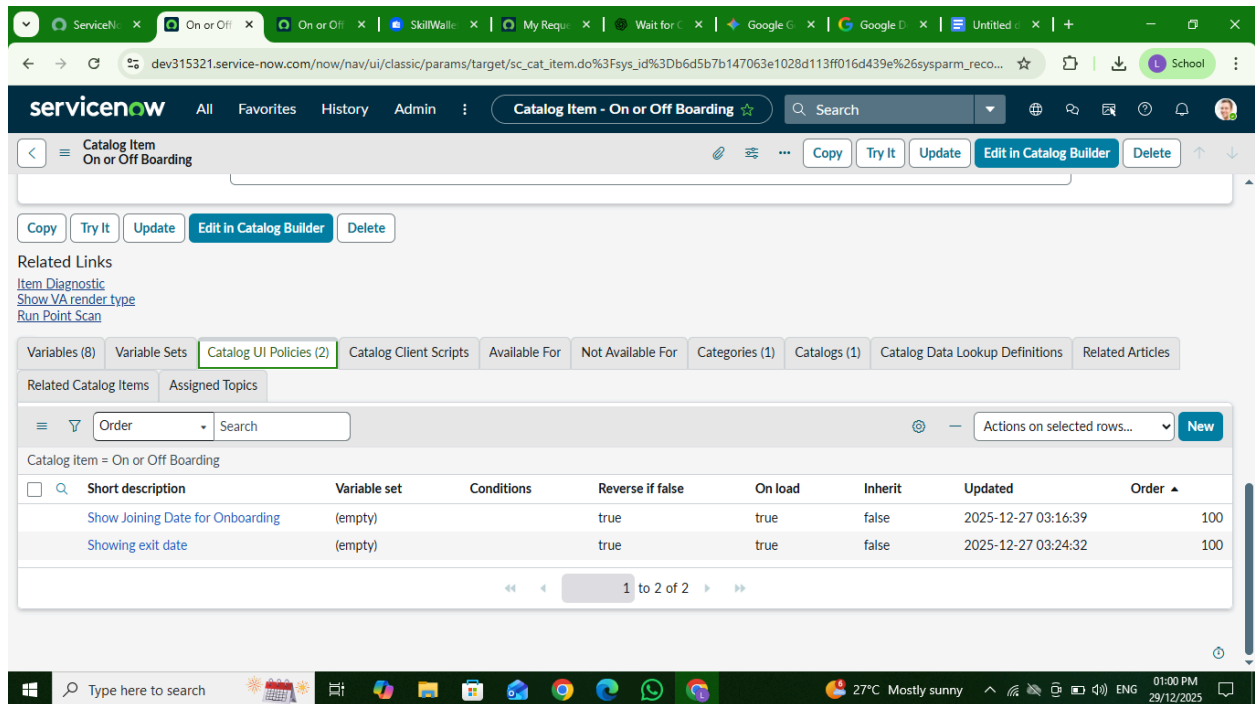
Variables (8) Variable Sets Catalog UI Policies (2) Catalog Client Scripts Available For Not Available For Categories (1) Catalogs (1) Catalog Data Lookup Definitions Related Articles

Related Catalog Items Assigned Topics

Order Search Actions on selected rows... New

Catalog item = On or Off Boarding

Type	Question	Order
Single Line Text	Employee Name	310
Single Line Text	Employee ID	320
Reference	Department	330
Multiple Choice	Request Type	340
Reference	Requested For	350
Reference	Managers	360
Date	Joining Date	400
Date	Exit date	410



5. Flow Designer Workflow

Trigger: Service Catalog → Catalog Item Requested.

Execution Steps:

1. **Get Variables:** Retrieve all employee and asset data.
2. **Initialize Record:** Insert a record into the u_employee_lifecycle table.
3. **Manager Approval:** Route approval to the "Manager" variable specified in the form.
4. **Conditional Branching:**
 - If **Approved:** Auto-generate departmental tasks for IT and Facilities.
 - If **Rejected:** Update the lifecycle record and notify the requester.
5. **Status Update:** Close the lifecycle record upon task completion.

Workflow Studio interface showing the "On or Off Boarding Flow" (Inactive). The flow is currently in Draft status and is a Global Application.

TRIGGER

- Service Catalog

ACTIONS *Select multiple*

1. Get Catalog Variables from On or Off Boarding from On or Off Boarding
2. If If Req Type OnBoarding (Decision)
3. then Create Employee Lifecycle Record (Action)
4. Ask For Approval on Requested Item (Action)
5. If If Approve (Decision)
6. then Send Email (Action)

Data *Expand All*

- Flow Variables
- Trigger - Service Catalog
- 1 - Get Catalog Variables
- 2 - If
- 3 - Create Record
- 4 - Ask For Approval
- 5 - If
- 6 - Send Email
- 7 - Create Task
- 8 - Create Task
- 9 - Create Task
- 10 - Wait For Condition
- 11 - Update Record
- 12 - Send Email

Status: Draft | Application: Global

Workflow Studio interface showing the "On or Off Boarding Flow" (Inactive). The flow is currently in Draft status and is a Global Application.

TRIGGER

- Service Catalog

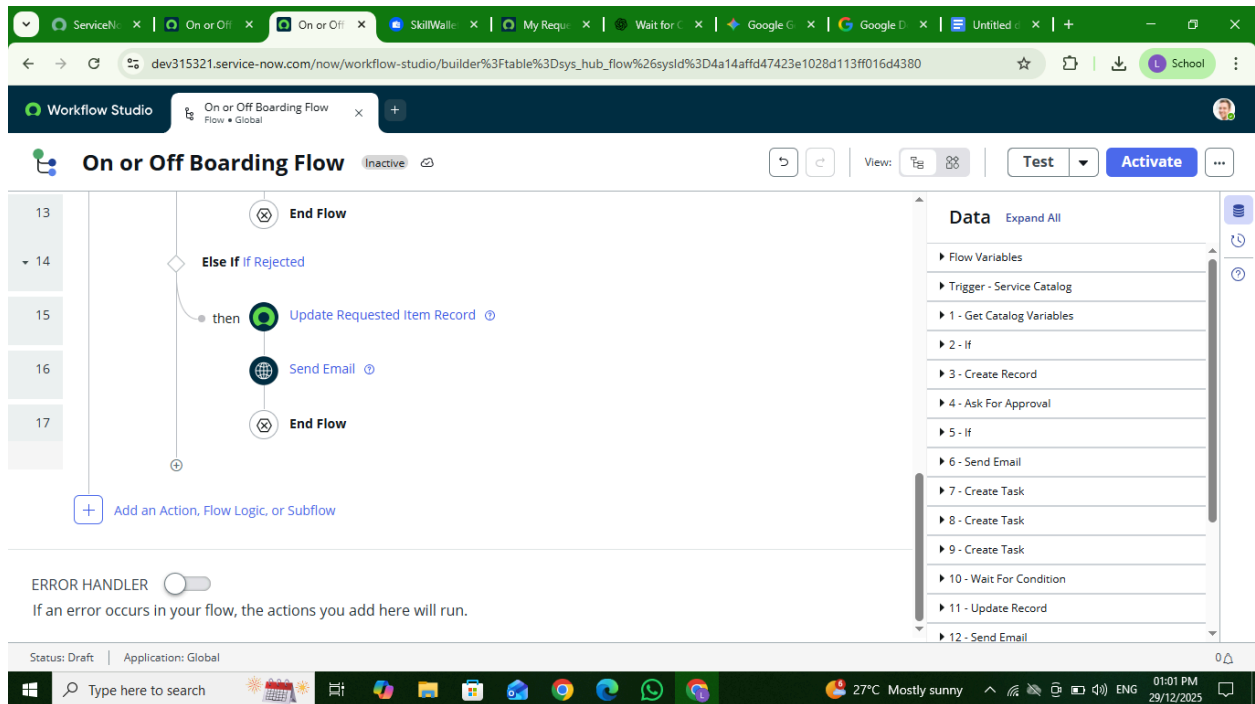
ACTIONS *Select multiple*

6. Send Email
7. Create Catalog Task Task
8. Create Catalog Task Task
9. Create Catalog Task Task
10. Wait For Catalog Task Condition where (State is Closed Complete)
11. Update Employee Lifecycle Record
12. Send Email
13. End Flow

Data *Expand All*

- Flow Variables
- Trigger - Service Catalog
- 1 - Get Catalog Variables
- 2 - If
- 3 - Create Record
- 4 - Ask For Approval
- 5 - If
- 6 - Send Email
- 7 - Create Task
- 8 - Create Task
- 9 - Create Task
- 10 - Wait For Condition
- 11 - Update Record
- 12 - Send Email

Status: Draft | Application: Global



6. Role & ACL Configuration

Configure access to the Employee Lifecycle table based on roles:

- **Admin:** Full access to all records.
- **HR/Department Lead:** Read and Update access for fulfillment.
- **End User:** Create and Read access for their own requests.

7. Test Execution & Validation

1. Log in to the **Service Portal (/sp)**.
2. Submit a test "Onboarding" request with sample employee data.
3. Verify:
 - Record creation in the Lifecycle table.
 - Approval notification sent to the designated Manager.
 - Automatic generation of departmental tasks upon approval.
 - Correct UI policy execution (field visibility/labels).

If Approved:

ServiceNow Search Results for "on or off boarding"

Home > Search

Search: on or off boarding

Sources: All, Knowledge Bases, Catalogs

FILTERS: Knowledge Bases, Category, Author, Last modified, View Count, Catalogs

All results for "on or off boarding"

- On or Off Boarding**
- Microsoft Outlook Issues**
can also be edited by following the above procedure. To turn Automatic Replies rules on or off to turn on or off.
Article: KB99999999 · Published: 7y ago
- Automatic Replies (Out Of Office)**
on or off, in the Automatic Reply Rules dialog box, select or clear the check box of the rule that you want to turn on or off.
Article: KB00000025 · Published: 11y ago
- Deleted Email Recovery**
was permanently deleted). Automatically Empty Deleted Items on Log Off OWA can be configured to empty Deleted Items when the user logs off of OWA. The items will be stored in the Recover Deleted

27°C Mostly sunny 01:05 PM 29/12/2025

ServiceNow Catalog Item: On or Off Boarding

Home > Service Catalog > Office > Services > On or Off Boarding

Search Catalog

On or Off Boarding

*Employee Name: Abel Tuter

*Employee ID: 1234567

Department: IT

Request Type: ☒ Onboarding ☐ Offboarding

Requested For: Abel Tuter

Managers

Quantity: 1

Delivery Time: 2 Days

Add to Cart

Save as Draft

Order Now

27°C Mostly sunny 01:05 PM 29/12/2025

ServiceNowOn or OffBoardingWait forGoogleGoogleUntitledSchool

dev315321.service-now.com/sp?id=sc_cat_item&sys_id=b6d5b7b147063e1028d113ff016d439e

ServiceNowKnowledgeCatalogRequestsSystem StatusCartToursSystem Administrator

HomeService CatalogOfficeServicesOn or Off BoardingSearch Catalog

Offboarding

Requested For

Managers

Joining Date

Add attachments

Quantity: 1

Delivery Time: 2 Days

Add to Cart

Save as Draft

Order Now

Type here to search

27°C Mostly sunny

01:05 PM 29/12/2025

ServiceNowRequest Summary - REQ0010008Wait forGoogleGoogleUntitledSchool

dev315321.service-now.com/sp?id=sc_request&is_new_order=true&table=sc_request&sys_id=6a5a0e2647c2725028d113ff016d4378

ServiceNowKnowledgeCatalogRequestsSystem StatusCartToursSystem Administrator

HomeRequest Summary - REQ0010008Search Catalog

Submitted: 2025-12-28 23:36:00
Request Number: REQ0010008
Estimated Delivery: 2025-12-30

Item	Delivery Date	Stage	Price (each)	Quantity	Total
On or Off Boarding	2025-12-30	Assess or Scope Task	---	1	---
					Total: \$0.00

Type here to search

27°C Mostly sunny

01:06 PM 29/12/2025

ServiceNow

Knowledge Catalog Requests System Status Cart Tours System Administrator

Home > My Request - RITM0010010

On or Off Boarding

Item	Requested for	Quantity
On or Off Boarding	System Administrator	1

Stage
Assess or Scope Task

Activity Attachments Additional Details

Type your message here... Post

System Administrator
RITM0010010 Created just now

Start

Workflow Studio

On or Off Boarding Flow

TRIGGER

- Service Catalog

ACTIONS Select multiple

- 1 Get Catalog Variables from
- 2 If if Req Type OnBoarding
- 3 then Create Em
- 4 Ask For Approval on Requested Item
- 5 If if Approve
- 6 then Send Email

Test flow

Run your flow to make sure it has no errors before you activate it. When the test finishes running, check the execution details to see each action's configuration, runtime values, and the log messages for any errors that occurred.

* Requested Item Record X Q + ⓘ

☐ Run test in background ⓘ

Cancel Run Test

Status: Published | Application: Global

ServiceNow

On or Off Boarding Flow

On or Off Boarding Flow

On or Off Boarding Flow

My Request

Wait for

Google

Google

Untitled

dev315321.service-now.com/now/workflow-studio/builder%3Ftable%3Dsys_flow_context%26sysld%3D638a86660bc272501589bc05b2c9b142

Workflow Studio

On or Off Boarding Flow

On or Off Boarding Flow

EXECUTION DETAILS

On or Off Boarding Flow

Test Run - Waiting

Cancel flow

Open flow

Open context record

Show Action Details

State

Start time

FLOW STATISTICS

Run as: System Administrator

Open flow logs

Waiting

2025-12-28 23:36:53

303ms

TRIGGER

Catalog Item Requested

ACTIONS

1

Get Catalog Variables from On or Off Boarding

Core Action

Completed

2025-12-28 23:36:53

16ms

2

If If Req Type OnBoarding

Flow Logic

Evaluated - True

2025-12-28 23:36:53

284ms

3

Create Record

Core Action

Completed

2025-12-28 23:36:53

8ms

4

Ask For Approval

Core Action

Waiting

2025-12-28 23:36:53

276ms

5

If If Approve

Flow Logic

Not Run

ServiceNow

Request

On or Off Boarding

SkillWait

My Request

Wait for

Google

Google

Untitled

dev315321.service-now.com/now/nav/ui/classic/params/target/sysapproval_approver.do%3Fsys_id%3D7f8a866647c2725028d113ff016d43c7%26sysp...

servicenow

All

Favorites

History

Approval - Requested Item: RITM00...

Search

Approval

Requested Item: RITM0010010

Update

Approve

Reject

Delete

Approver

Aileen Mottern

Approving

Requested Item: RITM0010010

State

Approved

Approval Reason

Summary of Item being approved:

Description	Price	Quantity	Total
On or Off Boarding	\$0.00	1	\$0.00

Comments

Comments

Post

Activities: 1

System Administrator

Field changes

2025-12-28 23:36:53

Approver

Aileen Mottern

State

Requested

Workflow Studio On or Off Boarding Flow

EXECUTION DETAILS On or Off Boarding Flow

Test Run - Waiting Cancel flow Open flow Open context record

Show Action Details		State	Start time	
4	Ask For Approval	Core Action	Completed	2025-12-28 23:36:53 497ms
5	If If Approve	Flow Logic	Evaluated - True	2025-12-28 23:37:45 220ms
6	Send Email		Completed	2025-12-28 23:37:45 23ms
7	Create Task	Core Action	Completed	2025-12-28 23:37:45 63ms
8	Create Task	Core Action	Completed	2025-12-28 23:37:45 51ms
9	Create Task	Core Action	Completed	2025-12-28 23:37:45 57ms
10	Wait For Condition	Core Action	Waiting	2025-12-28 23:37:45 26ms
11	Update Record	Core Action	Not Run	
12	Send Email		Not Run	

ServiceNow Catalog Task - SCTASK0010029

Number: SCTASK0010029

Assigned to: [Search]

Configuration item: [Search]

Active: ☒

Approval: Not Yet Requested

Priority: 4 - Low

State: Closed Complete

Request item: RITM0010010

Requested for: System Administrator

Short description: Create accounts & assign hardware

Description: [Text Area]

Work notes: [Text Area]

Post

Activities: 1

System Administrator

Impact: 3 - Low

Opened by: System Administrator

Field changes: 2025-12-28 23:37:45

Workflow Studio interface showing the execution details of an "On or Off Boarding Flow". The flow is completed, and the execution details table shows the following actions:

Step	Action	Type	State	Start time	Duration
10	Wait For Condition	Core Action	Completed	2025-12-28 23:37:45	35ms
11	Update Record	Core Action	Completed	2025-12-28 23:38:46	6ms
12	Send Email	Core Action	Completed	2025-12-28 23:38:46	36ms
13	End	Flow Logic	Completed	2025-12-28 23:38:46	0ms
14	Else If If Rejected	Flow Logic	Not Run		
15	Update Record	Core Action	Not Run		
16	Send Email	Core Action	Not Run		
17	End	Flow Logic	Not Run		

The error handler section is visible below the execution details.

If Rejected:

Workflow Studio interface showing the "Test flow" dialog box. The dialog prompts the user to run the flow to ensure it has no errors before activation. The test is configured with the "Requested Item Record" set to "RITM0010010".

Test flow

Run your flow to make sure it has no errors before you activate it. When the test finishes running, check the execution details to see each action's configuration, runtime values, and the log messages for any errors that occurred.

* Requested Item Record: RITM0010010

Your test has finished running. View the flow execution details.

☐ Run test in background

Buttons: Cancel, Run Test

Workflow Studio On or Off Boarding Flow

EXECUTION DETAILS On or Off Boarding Flow

Test Run - Waiting Cancel flow Open flow Open context record

Show Action Details

	State	Start time	
FLOW STATISTICS	Run as: System Administrator	Waiting	2025-12-28 23:41:54 177ms
TRIGGER			
Catalog Item Requested			
ACTIONS			
1	Get Catalog Variables from On or Off Boarding	Core Action	Completed 2025-12-28 23:41:54 14ms
2	If If Req Type OnBoarding	Flow Logic	Evaluated - True 2025-12-28 23:41:54 160ms
3	Create Record	Core Action	Completed 2025-12-28 23:41:54 3ms
4	Ask For Approval	Core Action	Waiting 2025-12-28 23:41:54 157ms
5	If If Approve	Flow Logic	Not Run

servicenow All Favorites History Workspaces Approvals

Search

Created Search

Actions on selected rows...

State	Approver	Comments	Approval for	Created
Requested	Aileen Mottern		RITM0010010	2025-12-28 23:41:54
Approved	Aileen Mottern		RITM0010010	2025-12-28 23:36:53
Rejected	Aileen Mottern	2025-12-28 22:44:17 - System Administrat	RITM0010009	2025-12-28 22:43:25
Cancelled	Aileen Mottern	2025-12-28 22:38:37 - System Administrat	RITM0010009	2025-12-28 22:38:04
Approved	Aileen Mottern	2025-12-28 22:37:29 - System Administrat	RITM0010009	2025-12-28 22:36:22
Rejected	Aileen Mottern	2025-12-28 22:20:45 - System Administrat	RITM0010009	2025-12-28 22:19:57
Approved	Aileen Mottern		RITM0010009	2025-12-28 22:17:47
Approved	Aileen Mottern		RITM0010009	2025-12-28 22:07:53
Approved	Aileen Mottern		RITM0010008	2025-12-28 21:54:11
Approved	Bow Ruggeri		(empty)	2025-12-26 00:05:17
Approved	Bow Ruggeri		(empty)	2025-12-25 23:16:11
Approved	Bow Ruggeri		(empty)	2025-12-22 03:01:09
Approved	Bow Ruggeri		(empty)	2025-12-22 02:51:21

ServiceNow Approval - Requested Item: RITM0010010

Approver: Aileen Mottern
State: Rejected
Approval Reason: [Empty field]
Summary of Item being approved:

Description	Price	Quantity	Total
On or Off Boarding	\$0.00	1	\$0.00

* Comments: The employee onboarding request is rejected.

Activities: 1
System Administrator
Field changes: 2025-12-28 23:41:54

Approver: Aileen Mottern
State: Requested

Buttons: Update, Approve, Reject, Delete

Workflow Studio On or Off Boarding Flow

EXECUTION DETAILS

Test Run - Completed

Step	Action	Type	State	Start time	Duration
11	Update Record	Core Action	Not Run		
12	Send Email		Not Run		
13	End	Flow Logic	Not Run		
14	Else If if Rejected	Flow Logic	Evaluated - True	2025-12-28 23:43:11	100ms
15	Update Record	Core Action	Completed	2025-12-28 23:43:11	75ms
16	Send Email		Completed	2025-12-28 23:43:11	25ms
17	End	Flow Logic	Completed	2025-12-28 23:43:11	0ms

ERROR HANDLER