

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

Screenshot of ServiceNow Employee Lifecycle table configuration.

Table - Employee Lifecycle

Columns (selected), **Controls**, **Application Access**

Dictionary Entries

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

Actions: Delete, Update, Delete All Records

Bottom Navigation: Type here to search, Calendar icon, File icons, Browser icons, Weather icon (27°C Mostly sunny), Network icon, ENG, Date (29/12/2025).

Screenshot of ServiceNow Employee Lifecycle table configuration, showing the "Employee ID" column selected.

Table - Employee Lifecycle

Columns (selected), **Controls**, **Application Access**

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
Created by	String	(empty)	40	false	
Requested for	Reference	User	32	false	
Sys ID	Sys ID (GUID)	(empty)	32	false	
Request type	Choice	(empty)	40	false	
Employee ID	String	(empty)	40	false	
Exit date	Date	(empty)	40	false	
Status	Choice	(empty)	40	false	
Created	Date/Time	(empty)	40	false	
Manager	Reference	User	32	false	
Department	Reference	Department	32	false	
Updated by	String	(empty)	40	false	
Updates	Integer	(empty)	40	false	
Joining date	Date	(empty)	40	false	
Updated	Date/Time	(empty)	40	false	
RITM	Reference	Requested Item	32	false	

Actions: Delete, Update, Delete All Records

Bottom Navigation: Type here to search, Calendar icon, File icons, Browser icons, Weather icon (27°C Mostly sunny), Network icon, ENG, Date (29/12/2025).

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).

Screenshot of ServiceNow Catalog Item creation screen:

Item Details:

Name	On or Off Boarding	Application	Global
Catalogs	Service Catalog	Active	<input checked="" type="checkbox"/>
Category	Services	Roles	(empty)
State	-- None --	Fulfillment automation level	Unspecified
Checked out	-- None --		
Owner	System Administrator		

Short description: Type here to search

Description: Type here to search

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:

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

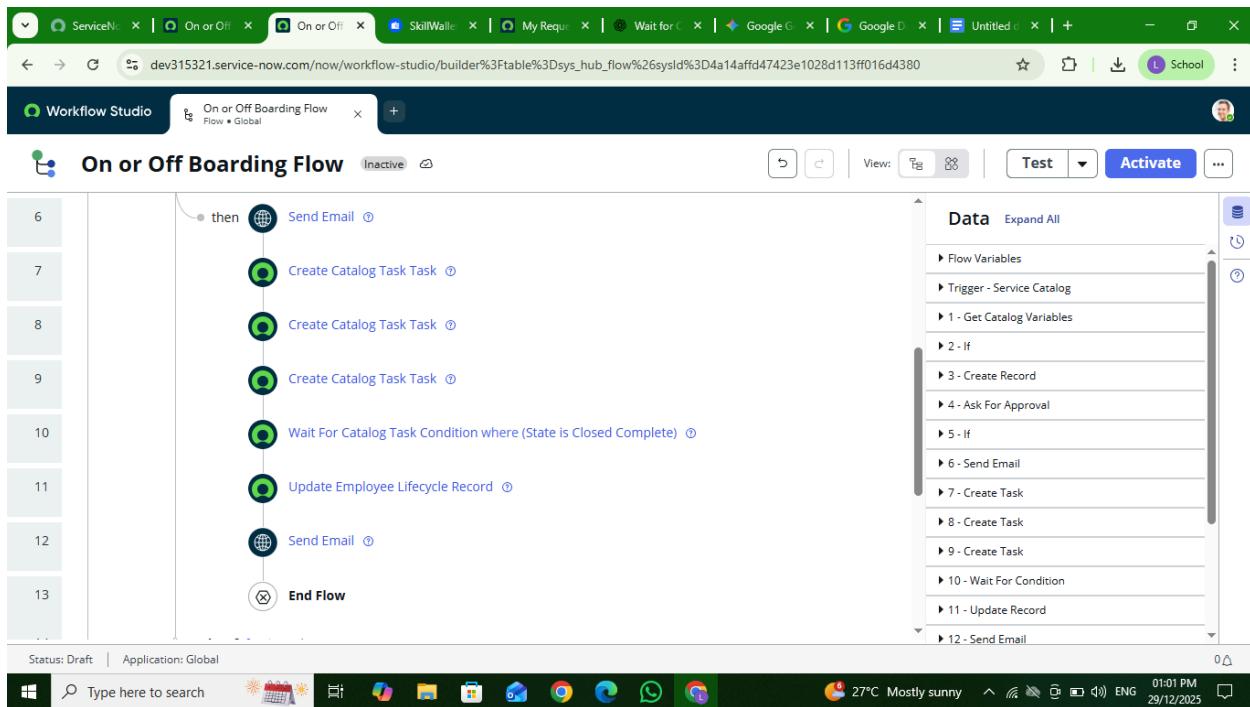
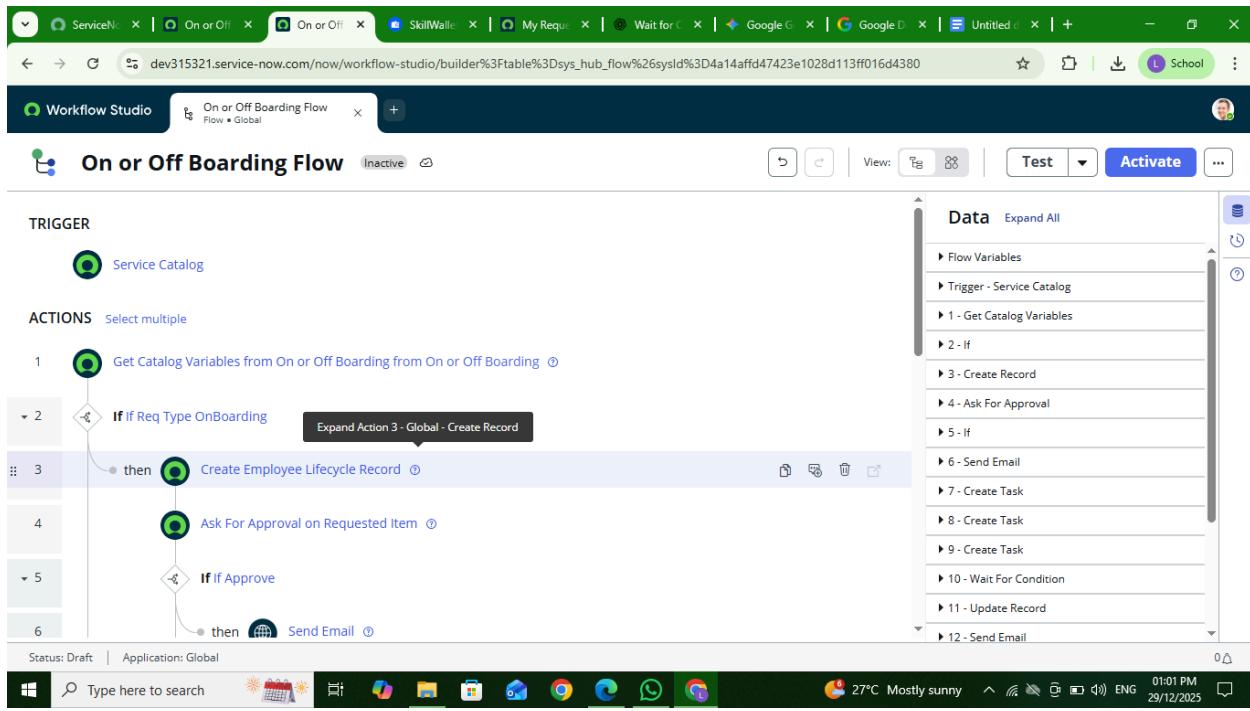
Short description	Variable set	Conditions	Reverse if false	On load	Inherit	Updated	Order
Show Joining Date for Onboarding	(empty)		true	true	false	2025-12-27 03:16:39	100
Showing exit date	(empty)		true	true	false	2025-12-27 03:24:32	100

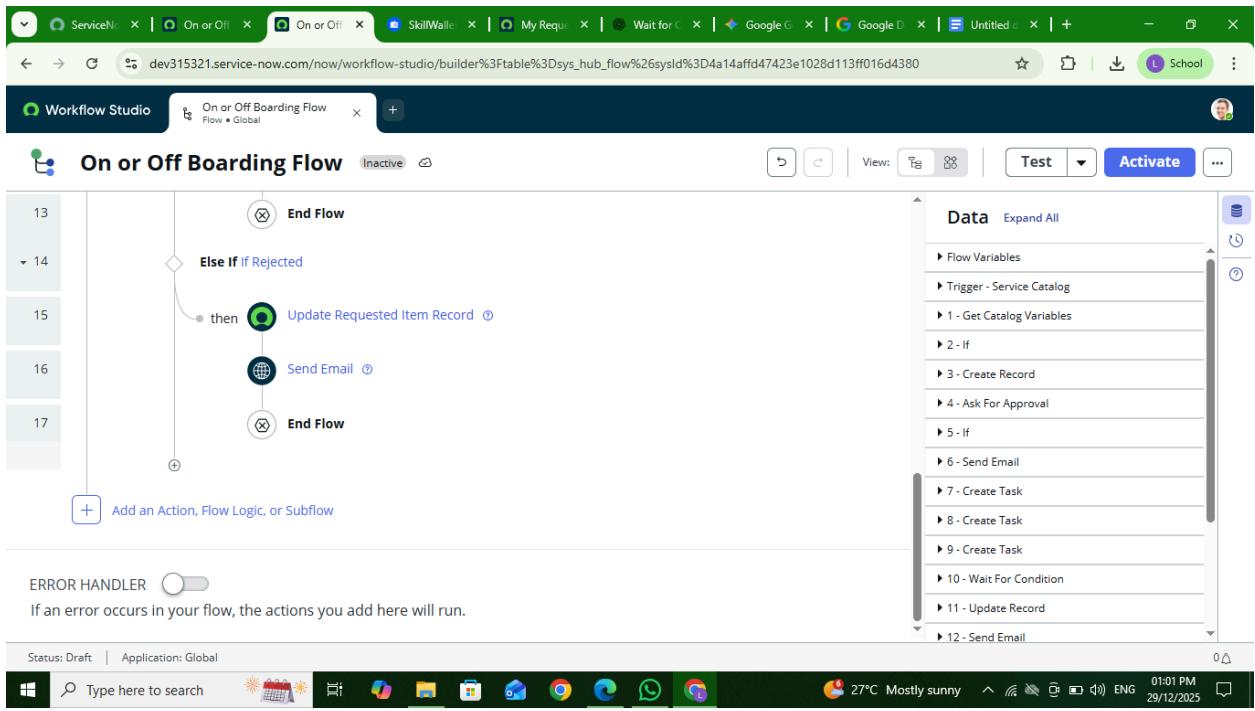
5. Flow Designer Workflow

Trigger: Service Catalog → Catalog Item Requested.

Execution Steps:

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





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".

Search bar: on or off boarding

Results:

- 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: KB9999999 · 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: KB0000025 · 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

Servicenow Service Catalog - On or Off Boarding page.

Page navigation: Home > Service Catalog > Office > Services > On or Off Boarding

Form fields:

- * Employee Name: Abel Tuter
- * Employee ID: 1234567
- Department: IT
- Request Type:
 - Onboarding
 - Offboarding
- Requested For: Abel Tuter
- Managers

Right sidebar actions:

- Quantity: 1
- Delivery Time: 2 Days
- Add to Cart
- Save as Draft
- Order Now

Servicenow - dev315321.service-now.com

On or Off Boarding

Knowledge Catalog Requests System Status Cart Tours System Administrator

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

Search Catalog

Offboarding

Requested For: Abel Tuter

Managers: Aileen Mottern

Joining Date: 2025-12-31

Add attachments

Choose a file or drag it here.

Copy and paste clipboard files here.

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

Servicenow - dev315321.service-now.com

Request Summary - REQ0010008

Knowledge Catalog Requests System Status Cart Tours System Administrator

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

The screenshot shows a ServiceNow request titled "My Request - RITM0010010". The request details are as follows:

- Item:** On or Off Boarding
- Requested for:** System Administrator
- Quantity:** 1

The request is currently at the "Assess or Scope Task" stage. Below the request details, there is a message board with one message from "System Administrator": "RITM0010010 Created". A "Start" button is visible next to the message.

The screenshot shows the ServiceNow Workflow Studio interface with a workflow titled "On or Off Boarding Flow". The workflow has the following steps:

- TRIGGER:** Service Catalog
- ACTIONS:** Get Catalog Variables from Catalog
- Decision:** If Req Type Onboarding
- Then: Create Employee
- Action:** Ask For Approval on Requested Item
- Decision:** If Approve
- Then: Send Email

A modal window titled "Test flow" is open, prompting the user to run the flow. The modal includes fields for the "Requested Item Record" (set to "RITM0010010") and a checkbox for "Run test in background". Buttons for "Cancel" and "Run Test" are present.

Screenshot of ServiceNow Workflow Studio and Approval Request interface.

Workflow Studio:

- Execution Details:** On or Off Boarding Flow
- State:** Waiting
- Start time:** 2025-12-28 23:36:53
- Flow Statistics:** Run as: System Administrator, Open flow logs, Waiting
- Trigger:** Catalog Item Requested
- Actions:**
 - Get Catalog Variables from On or Off Boarding (Core Action, Completed, 16ms)
 - If If Req Type OnBoarding (Flow Logic, Evaluated - True, 284ms)
 - Create Record (Core Action, Completed, 8ms)
 - Ask For Approval (Core Action, Waiting, 276ms)
 - If If Approve (Flow Logic, Not Run)

Approval Request:

- Approval:** Requested Item: RITM0010010, Approver: Aileen Mottern, State: Approved
- 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, Approver: Aileen Mottern, State: Requested)
- Buttons:** Update, Approve, Reject, Delete

Workflow Studio | **On or Off Boarding Flow** | **On or Off Boarding Flow**

Flow execution • None

EXECUTION DETAILS | On or Off Boarding Flow

Show Action Details

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

Expand or collapse Action Details

Type here to search 27°C Mostly sunny 01:08 PM 29/12/2025

servicenow All Favorites History Admin Catalog Task - SCTASK0010029

Catalog Task - SCTASK0010029

Number: SCTASK0010029
Assigned to:
Configuration item:
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:
Work notes: Work notes

Post

Activities: 1

System Administrator
Impact: 3 - Low
Opened by: System Administrator

Field changes • 2025-12-28 23:37:45

Type here to search 27°C Mostly sunny 01:08 PM 29/12/2025

EXECUTION DETAILS | On or Off Boarding Flow

Show Action Details	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		Completed	2025-12-28 23:38:46	36ms
13 End	Flow Logic	Completed	2025-12-28 23:38:46	0ms
14 Else If Rejected	Flow Logic	Not Run		
15 Update Record	Core Action	Not Run		
16 Send Email		Not Run		
17 End	Flow Logic	Not Run		

ERROR HANDLER

If Rejected:

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

Cancel **Run Test**

ERROR HANDLER

If an error occurs in your flow, the actions you add here will run.

Status: Published | Application: Global

Execution Details - On or Off Boarding Flow

State: Waiting | **Start time:** 2025-12-28 23:41:54 | **Duration:** 177ms

Run as: System Administrator | **Open flow logs**

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)

Approvals

Approvals | **Created** | **Search**

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

Approval - Requested Item: RITM00...

Approval Requested Item: RITM0010010

Approver: Aileen Mottern Approving: Requested Item: RITM0010010

State: Rejected

Approval Reason:

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	

Update | Approve | Reject | Delete

Type here to search

Workflow Studio

On or Off Boarding Flow

On or Off Boarding Flow • Global

On or Off Boarding Flow • None

EXECUTION DETAILS | On or Off Boarding Flow

Test Run - Completed | Open flow | Open context record

Show Action Details

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

ERROR HANDLER

Type here to search