

# ServiceNow Setup Guide

## PDF Generator v5.0

**Roles Required:** admin

### Create a New Template:

1. Navigate to PDF Generator > General Document Templates
2. Click New
3. Fill in the information from selection or `${fieldname}`

### Create a pdf script:

If you need to create a custom field or html setup that needs to be more dynamic the pdf script option should help fit, you need.

1. Navigate to PDF Generator > PDF Script
2. Click New

3. Add a new script where you **return answer = <the value to display on the form>**

PDF Script  
New record

Name: DateCheck Active: ☒

Script

```

1 * answer = (function runScript(current){
2   //return a value based on some checks
3   var date = current.start;
4
5   if(start == ''){
6     return 'We cannot continue until the date is selected';
7   }
8
9   return 'We will start on ' + date;
10  })(current);

```

HTML Can be passed also

Submit

4. To add this script to your Template add the line `${pdf_script:scriptname}`

## Create a Signature Task:

Signature task is to help generate a traceable action item to have responsible owners sign the document you are generating. **While this is working the idea is still a work in progress on the best method to include this.**

1. In the document template pass `${sig_task:correlation_id}`
2. Signature task should be pointed to record and table where pdf is generated
3. Create a `u_sig_task` record with a **correlation\_id**, **u\_document\_id**, **u\_document\_table** field populated and pointing to the correct record.
  - a. This was intended to be used as part of a workflow or generated via a script.

Example:

Signature Task  
SIGTSK0001012

Number: SIGTSK0001012

Assigned to: Jake McKenna

Signature table: Requested Item [sc\_req\_item]

State: Open

Closed:

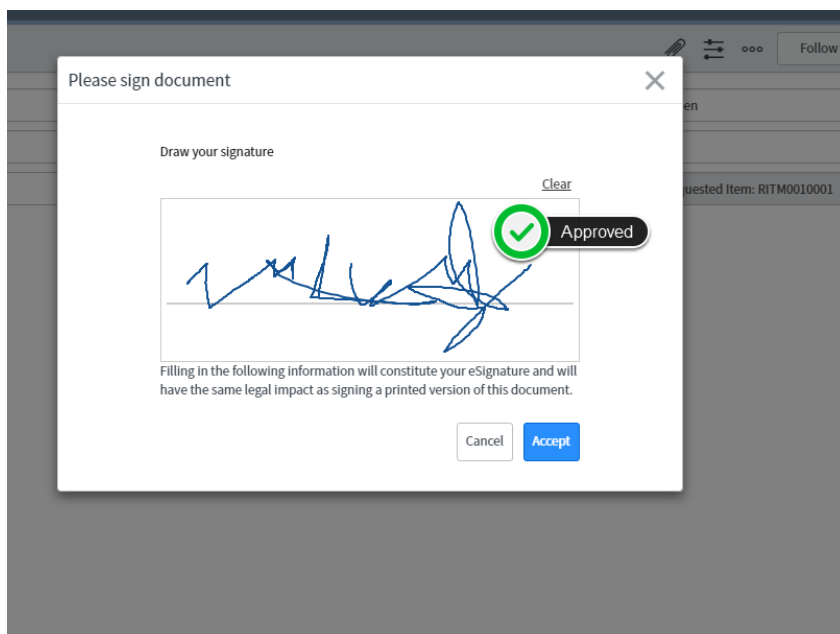
Signature for: Requested Item: BITM0010001

Populate on generation of task

Sign Document

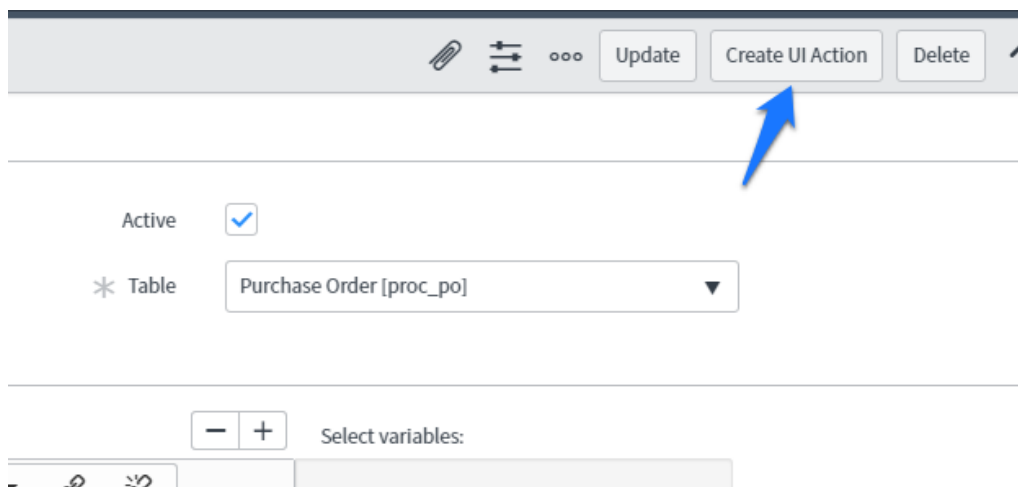
Update Sign Document Delete

Related Links  
Sign Document



## Add UI Action:

1. Open the template you are looking to deploy.
2. Locate the Create UI Action button on the form.



3. This should open up a new UI Action that is create with your template
4. Review the parameters and make alterations to **sysparm\_fileName** if desired.
  - a. This parameter sets what the file name will be when generated.
5. The users will see a new button called **Preview PDF**.

a. Button should provide template output preview:

Edit document

1875 W Cloud Road

Phoenix, AZ 85085

All invoices should be e-mailed to  
AM\_INV@cloudcity.com

Bill to:  
10065 East Harvard Avenue, Denver  
Aurora, CO 80014-1616  
Vendor: Canon

Contract number: PC-9837721001

Purchase Order  
Number: PO0000012

Purchase Order Date: 2017-  
02-02 13:32:43

Ship to: Southern California  
615 North Bush Street, Santa Ana  
Santa Ana, CA

Product Description	Part Number	Qty	Price	Extended
Canon ImageCLASS Laser P				
			SubTotal	\$499.99
			Shipping Rate	\$0.00
			Grand Total	\$499.99

Notes to vendor:  
Pleases Hurry on this order!

Cancel

Save

Generate

Reset

Save = Save copy of current draft

Generate = Attach PDF to record

Reset = regenerate based on template

- b. Saving the document creates a new draft in the draft\_document table that is saved for that user.
- c. Generate will attach the copy to the document for review or distribution.
- d. Reset will set the users current draft to false and recreate a draft document with the latest template changes.

6. \*\*To expose the draft\_document related list consider creating a relationship between the table and document table:

Relationship Drafts

NamePDF Drafts

ApplicationGlobal

Advanced☐

Applies to tablePurchase Order [proc\_po]

Queries from tableDraft Document [draft\_document]

This script refines the query in current that will populate the related list. For more information about it, its parameters and control variables, see the Wiki See also the article about the recommended form of the script.

Query with

```
1+ (function refineQuery(current, parent) {
2
3 // Build a path to review and reopen old drafts a user created??
4 current.addQuery('document',parent.sys_id);
5 current.addQuery('user',gs.getUserID());
6
7 })(current, parent);
```

Update

Insert

Insert and Stay

Save

Delete

Related Links

Force to Update Set

## Know Issues:

- Not all HTML tags are currently supported. Such as <hr>, <title>.
- In Istanbul if you add an image to the template you need to alter the source code to add a / in front of image path.
- Certain styles are not yet supported as part of inline formatting such as font and background color.
  - o Workaround: use **bgcolor=** inline to allow formatting of background on table rows.
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