

Setup Manual

1. Purpose

This Setup Manual provides a step-by-step guide to replicate the Automated Employee Onboarding & Offboarding solution in a new **ServiceNow Personal Developer Instance (PDI)**. It ensures consistent setup, correct execution order, and successful validation of the solution.

2. Prerequisites

- Active ServiceNow PDI
 - Admin role access
 - Basic knowledge of Service Catalog and Flow Designer
-

3. Step 1: Service Catalog Item Creation

Catalog Item: Onboard / Offboard Employee

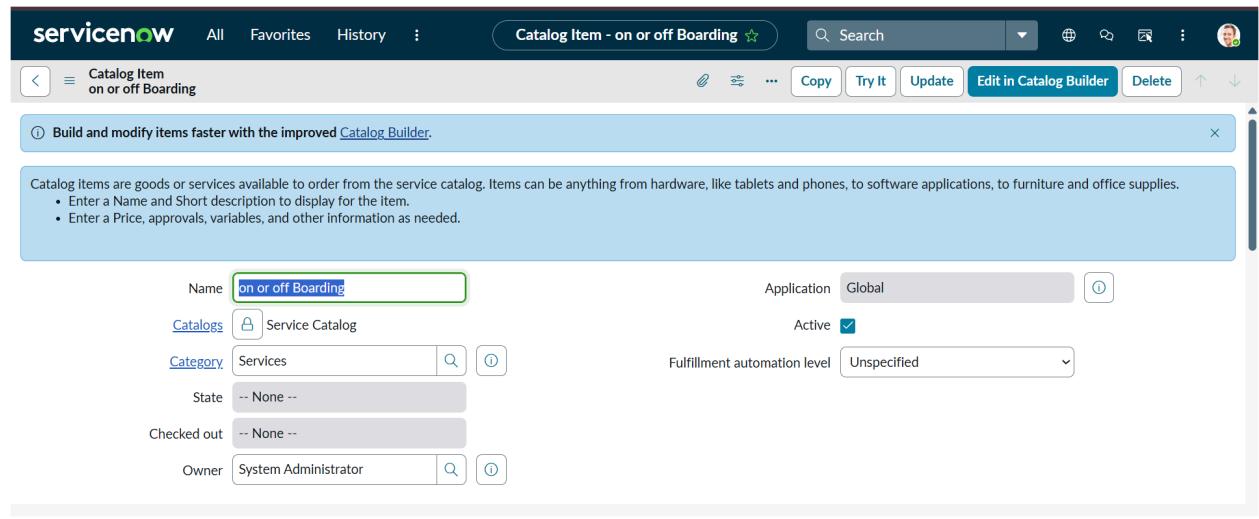
Navigation:

Service Catalog → Maintain Items → New

Configuration Steps:

1. Enter Name: *Onboard / Offboard Employee*
2. Select Catalog: *Service Catalog*
3. Choose appropriate Category
4. Provide Short Description
5. Save the catalog item

 Screenshot: Catalog Item creation screen



The screenshot shows the ServiceNow Catalog Item creation screen. At the top, there's a banner with the text "Build and modify items faster with the improved Catalog Builder." Below it, a note says "Catalog Items are goods or services available to order from the service catalog. Items can be anything from hardware, like tablets and phones, to software applications, to furniture and office supplies." It lists requirements: "Enter a Name and Short description to display for the item." The main form has the following fields:

- Name: on or off Boarding
- Application: Global
- Active: checked
- Catalogs: Service Catalog
- Category: Services
- State: -- None --
- Checked out: -- None --
- Owner: System Administrator
- Fulfillment automation level: Unspecified

4. Step 2: Variable Configuration & UI Policies

Variables to Configure:

- Request Type (Choice: Onboarding / Offboarding)
- Employee ID (Single Line Text)
- Department (Reference: cmn_department)
- Manager (Reference: sys_user)
- Joining Date (Date)
- Exit Date (Date)
- Assets (Multi-select Choice)
- Access Details (Multi-line Text)

The screenshot shows the ServiceNow Catalog Item - on or off Boarding page. At the top, there are tabs for Variables (9), Variable Sets, Catalog UI Policies (2), Catalog Client Scripts, Available For, Not Available For, Categories (1), Catalogs (1), Catalog Data Lookup Definitions, and Related Articles. Below the tabs, there are sections for Related Catalog Items and Assigned Topics. A search bar and a 'New' button are also present. The main content area displays a table of variables:

Type	Question	Order
Single Line Text	Employee name	310
Single Line Text	Employee ID	320
Multiple Choice	Variables	330
Multiple Choice	Request Type	340
Reference	Requested For	350
Reference	Department	360
Reference	Managers	370
Date	Joining Date	400
Date	Exit Date	500

At the bottom, there are navigation buttons for the table.

UI Policy Configuration:

Policy 1: Show Joining Date for Onboarding

- Condition: Request Type = Onboarding
- Action: Joining Date → Visible = True

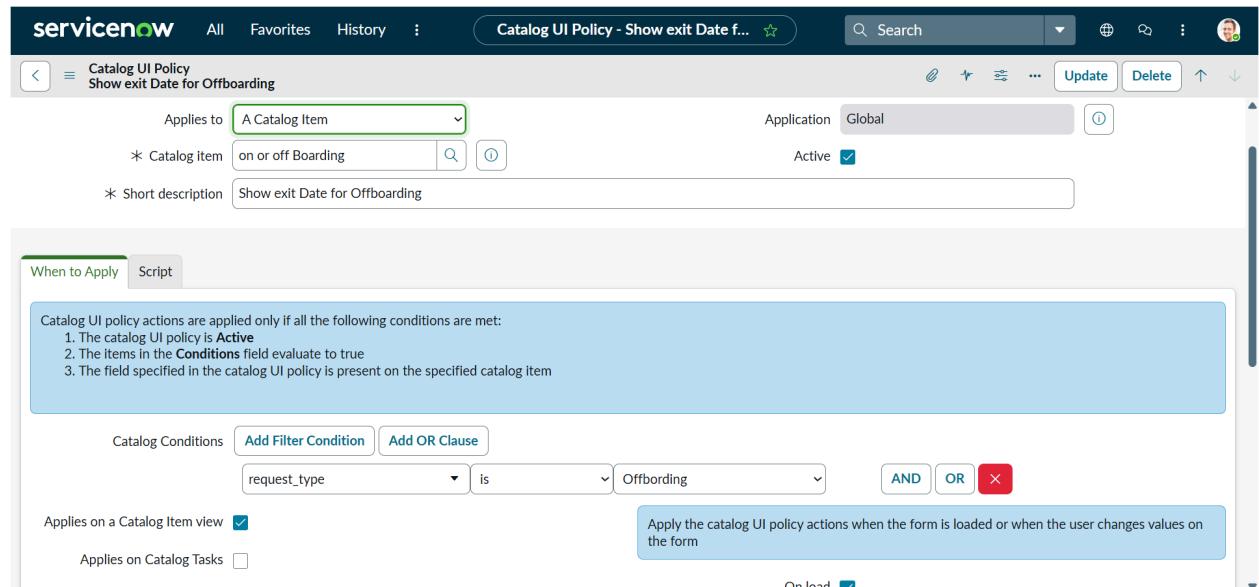
Screenshot:

The screenshot shows the Catalog UI Policy - Show Joining Date for Onboarding configuration page. At the top, there are tabs for Catalog UI Policy (Show Joining Date for Onboarding), Search, and other options. The main content area includes fields for Applies to (A Catalog Item, Catalog item: on or off Boarding), Application (Global), Active (checked), and Short description (Show Joining Date for Onboarding). Below these, a section titled 'When to Apply' has tabs for When to Apply and Script. It contains a note about Catalog UI policy actions being applied only if all conditions are met: 1. The catalog UI policy is Active, 2. The items in the Conditions field evaluate to true, and 3. The field specified in the catalog UI policy is present on the specified catalog item. At the bottom, there are sections for Catalog Conditions (Add Filter Condition, Add OR Clause) and a clause for request_type: is Onboarding, connected by AND.

Policy 2: Show Exit Date for Offboarding

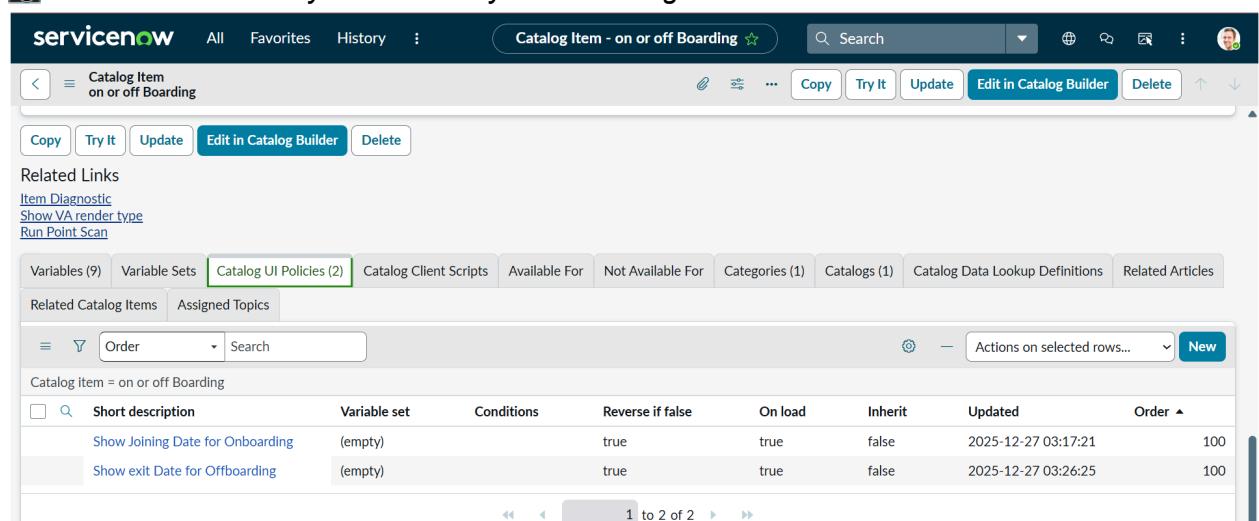
- Condition: Request Type = Offboarding
- Action: Exit Date → Visible = True

Screenshot:



The screenshot shows the 'Catalog UI Policy - Show exit Date f...' configuration page. It includes fields for 'Applies to' (set to 'A Catalog Item'), 'Catalog item' (set to 'on or off Boarding'), 'Application' (set to 'Global'), and 'Active' (checkbox checked). A note states: 'Catalog UI policy actions are applied only if all the following conditions are met: 1. The catalog UI policy is Active 2. The items in the Conditions field evaluate to true 3. The field specified in the catalog UI policy is present on the specified catalog item'. Below this, there are sections for 'Catalog Conditions' (with a dropdown for 'request_type' set to 'is Offboarding') and 'When to Apply' (checkbox checked for 'Applies on a Catalog Item view'). A note here says: 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form'. There is also an 'On load' checkbox.

Screenshot: UI Policy and UI Policy Action configuration



The screenshot shows the 'Catalog Item - on or off Boarding' configuration page. It includes tabs for 'Copy', 'Try It', 'Update', 'Edit in Catalog Builder' (which is selected), and 'Delete'. Under 'Related Links', there are links for 'Item Diagnostic', 'Show VA render type', and 'Run Point Scan'. The 'Catalog UI Policies (2)' tab is selected in the navigation bar. The main table lists two policies: 'Show Joining Date for Onboarding' and 'Show exit Date for Offboarding', both with 'Variable set' '(empty)', 'Conditions' 'true', 'On load' 'true', 'Inherit' 'false', and 'Updated' dates '2025-12-27 03:17:21' and '2025-12-27 03:26:25' respectively. The 'Order' column shows values '100' for both.

5. Step 3: Flow Designer Workflow Setup

Navigation:

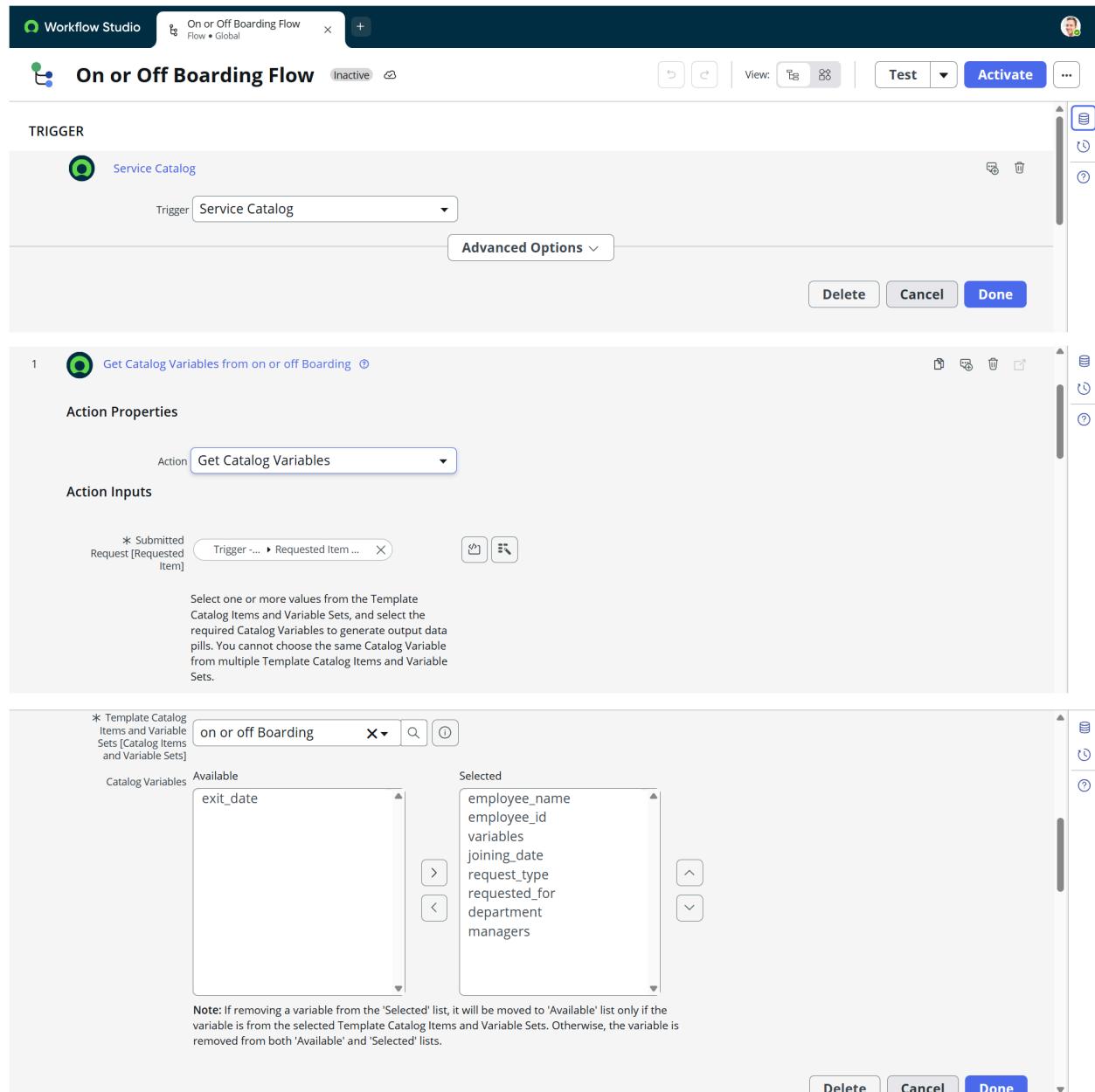
Flow Designer → New Flow

Flow Configuration:

1. Trigger: Service Catalog → Requested Item

2. Catalog Item: Onboard / Offboard Employee
3. Get Catalog Variables
4. Create Record → u_employee_lifecycle
5. Ask for Approval → Manager
6. Create sc_task records for IT, Facilities, Security
7. Wait for all tasks to close
8. Update lifecycle status and close RITM

 *Screenshot: Flow Designer canvas with actions*



2 If

Condition Label: 1 - Get Catalog Variables > request_type

* Condition 1: 1 - Get Catalog ... > request_t... is Onboarding or and

Add another condition set(OR)

Delete Cancel Done

3 then Create Employee Lifecycle Record

Action Properties

Action: Create Record

Action Inputs

- * Table: Employee Lifecycle [u_employee...]
- * Fields:
 - Requested for: 1 - Get Catalog ... > requested...
 - Employee ID: 1 - Get Catalog ... > employee...
 - Department: 1 - Get Catalog V... > departm...
 - Joining date: 1 - Get Catalog V... > joining_d...
 - Manager: 1 - Get Catalog Va... > manag...
 - Status: New

4 Ask For Approval on Requested Item

Action Properties

Action: Ask For Approval

Action Inputs

Trigger - Service Catalog > Requested Item Record

- * Record: Trigger ... > Requested Item ...
- Table: Requested Item [sc_req_item]
- Approval Reason:
- Approval Field: Approval
- Journal Field: Approval history

* Rules

Add another OR rule set

- Approve When: Anyone approves Aileen Mottern OR AND
- Due Date: None

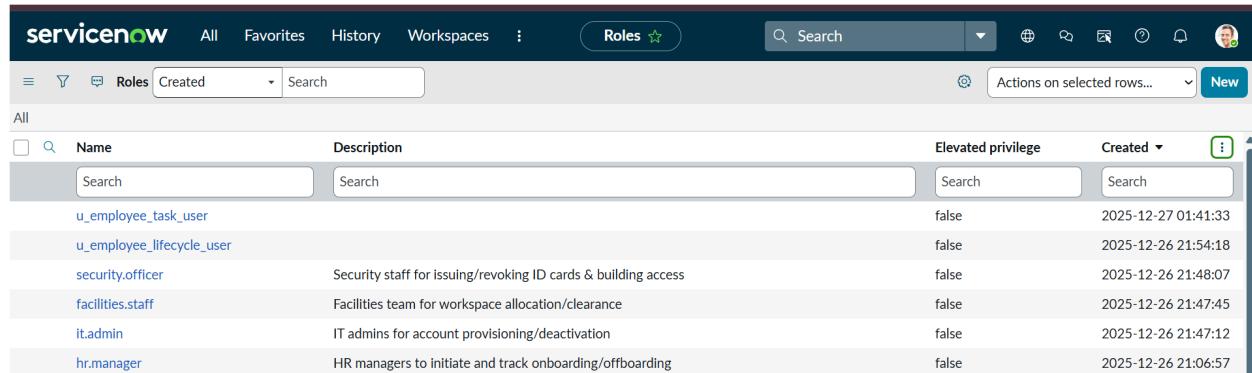
Delete Cancel Done

6. Step 4: Role, Group & ACL Configuration

Roles to Create:

- hr.manager
- it.admin
- facilities.staff
- Security.officer

 **Screenshot: Role**



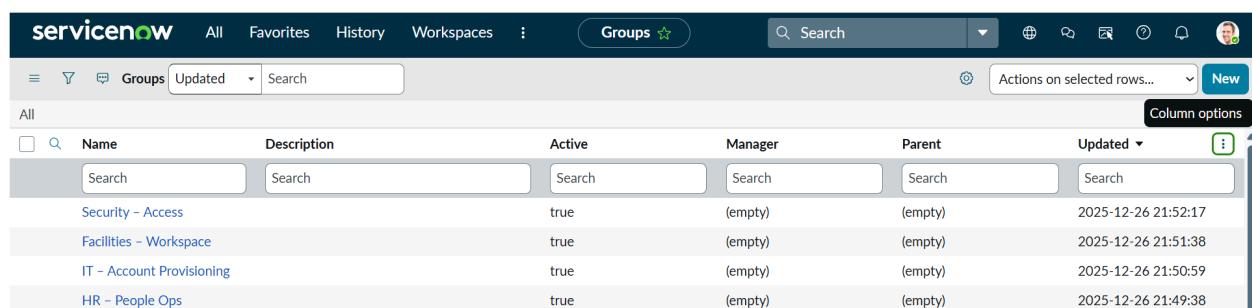
A screenshot of the ServiceNow Roles list interface. The top navigation bar shows 'servicenow' and various menu items like 'All', 'Favorites', 'History', 'Workspaces'. The current view is 'Roles' with a star icon. A search bar and a 'New' button are also present. The main table lists roles with columns for Name, Description, Elevated privilege, and Created. The data includes:

Name	Description	Elevated privilege	Created
Search	Search	Search	Search
u_employee_task_user		false	2025-12-27 01:41:33
u_employee_lifecycle_user		false	2025-12-26 21:54:18
security.officer	Security staff for issuing/revoking ID cards & building access	false	2025-12-26 21:48:07
facilities.staff	Facilities team for workspace allocation/clearance	false	2025-12-26 21:47:45
it.admin	IT admins for account provisioning/deactivation	false	2025-12-26 21:47:12
hr.manager	HR managers to initiate and track onboarding/offboarding	false	2025-12-26 21:06:57

Groups Mapping:

- HR – People Ops → hr.manager
- IT – Account Provisioning → it.admin
- Facilities – Workspace → facilities.staff
- Security – Access → security.officer

 **Screenshot: Group**



A screenshot of the ServiceNow Groups list interface. The top navigation bar shows 'servicenow' and various menu items like 'All', 'Favorites', 'History', 'Workspaces'. The current view is 'Groups' with a star icon. A search bar and a 'New' button are also present. The main table lists groups with columns for Name, Description, Active, Manager, Parent, and Updated. The data includes:

Name	Description	Active	Manager	Parent	Updated
Search	Search	Search	Search	Search	Search
Security - Access		true	(empty)	(empty)	2025-12-26 21:52:17
Facilities - Workspace		true	(empty)	(empty)	2025-12-26 21:51:38
IT - Account Provisioning		true	(empty)	(empty)	2025-12-26 21:50:59
HR - People Ops		true	(empty)	(empty)	2025-12-26 21:49:38

ACL Configuration:

- HR: Full access to lifecycle table
- Managers: Approval access only
- IT/Facilities/Security: Task-level access

7. Step 5: Test Request Submissions

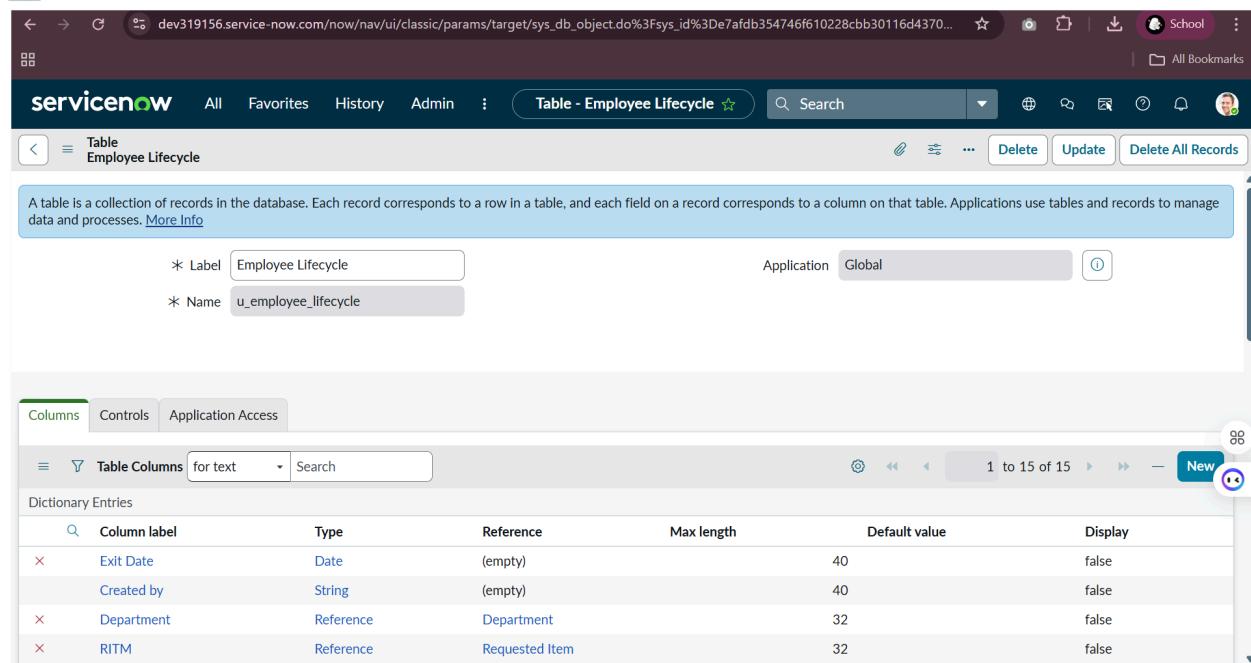
Test Scenarios:

- Submit onboarding request
- Verify manager approval routing
- Validate task creation for IT, Facilities, Security
- Confirm SLA triggering
- Ensure lifecycle status updates

Validation Points:

- Records created in the u_employee_lifecycle table
- Tasks assigned to correct groups
- Notifications sent successfully

Screenshot:



The screenshot shows the ServiceNow interface for managing the 'Employee Lifecycle' table. At the top, there's a navigation bar with links for 'All', 'Favorites', 'History', and 'Admin'. Below it, the main title is 'Table - Employee Lifecycle'. A sub-header indicates the table is named 'Employee Lifecycle' and is associated with the 'Global' application. The table itself has four columns: 'Label' (Employee Lifecycle), 'Type' (Text), 'Reference' (empty), and 'Display' (false). The first row contains fields for 'Exit Date' (Date type), 'Created by' (String type), 'Department' (Reference type to Department), and 'RITM' (Reference type to Requested Item). The bottom of the screen shows a toolbar with buttons for 'Delete', 'Update', and 'Delete All Records'.

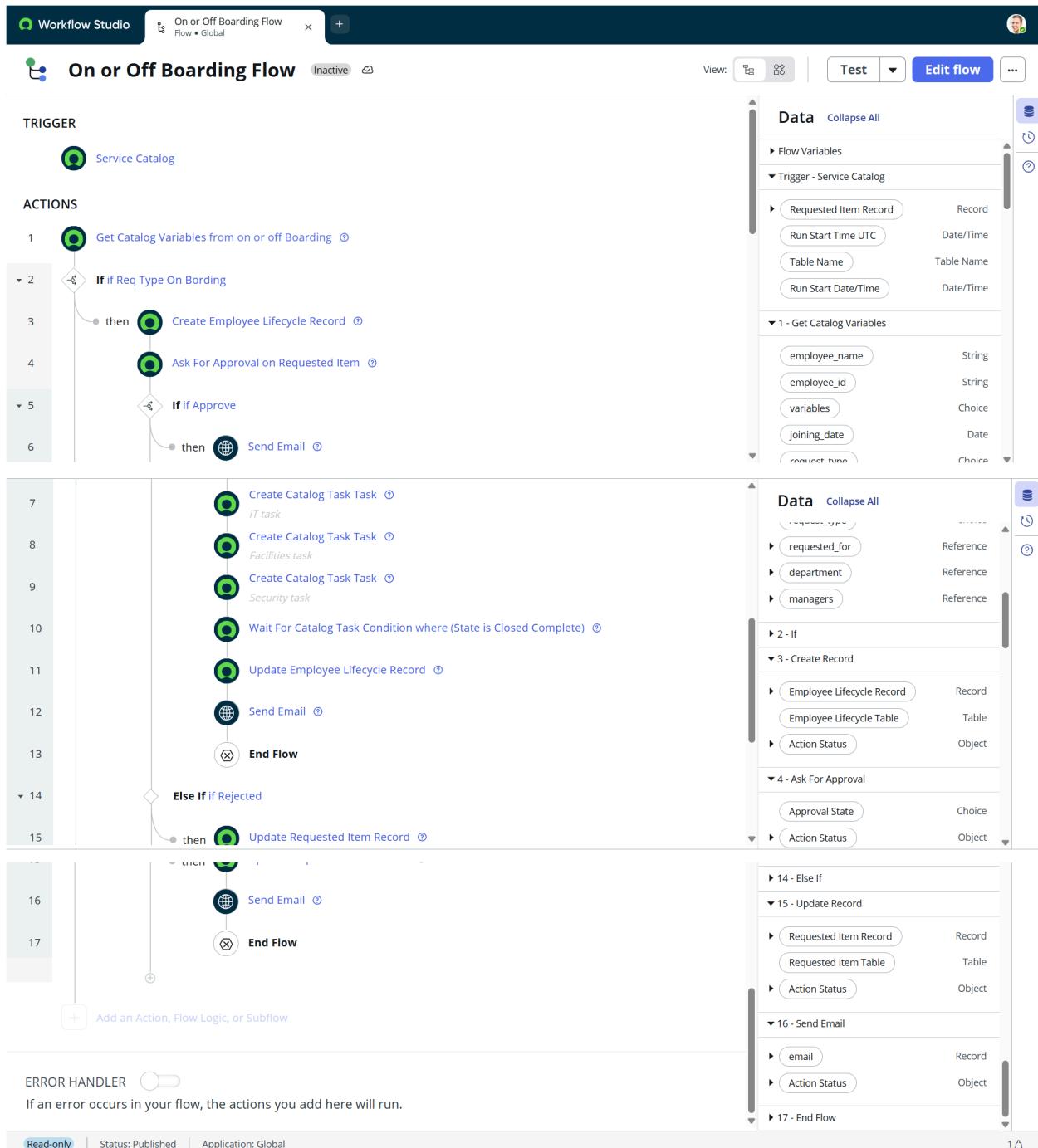
8. Sequence of Execution (High-Level)

[Catalog Submission]

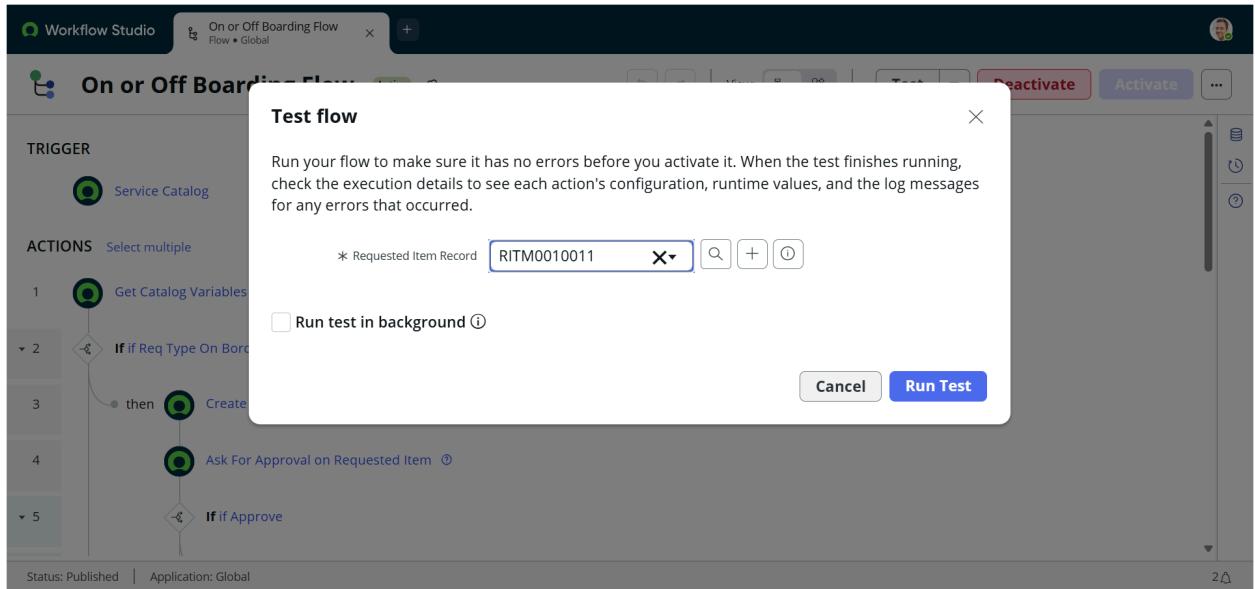
↓
[Variable Validation & UI Policies]
↓
[Flow Triggered]
↓
[Manager Approval]
↓
[Department Tasks Created]
↓
[SLA Monitoring]
↓
[Lifecycle Status Updated & Closure]

9. Setup Outcome

- Fully functional onboarding/offboarding automation



- Consistent setup across PDIs
- Ready for testing, demo, or deployment
- **If Approved test**



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 ⏱

FLOW STATISTICS Run as: System Administrator Open flow logs

TRIGGER Waiting 2025-12-29 23:27:30 351ms

Catalog Item Requested

ACTIONS

- 1 Get Catalog Variables from on or off Boarding Core Action Completed 2025-12-29 23:27:30 31ms
- 2 If if Req Type On Bording Flow Logic Evaluated - True 2025-12-29 23:27:30 316ms
- 3 Create Record Core Action Completed 2025-12-29 23:27:30 8ms
- 4 Ask For Approval Core Action Waiting 2025-12-29 23:27:30 308ms

servicenow All Favorites History Approval - Requested Item: RITM00...

Approval Requested Item: RITM0010011 Update Approve Reject Delete

Approver	Aileen Mottern	Approving	Requested Item: RITM0010011
State	Requested		
Approval Reason			
Summary of item being approved:			
Description			
on or off Board	Price	Quantity	Total
Comments	\$0.00	1	\$0.00
Comments			
Post			

Activities: 1 System Administrator Field changes • 2025-12-29 23:27:30

Approver Aileen Mottern
State Requested

Workflow Studio

On or Off Boarding Flow • Global

On or Off Boarding Flow • Flow execution • None

EXECUTION DETAILS **On or Off Boarding Flow**

Test Run - Waiting

Cancel flow Open flow Open context record

Show Action Details Refresh Flow Data State Start time

Step	Action	Type	Status	Start Time	Duration
3	Create Record	Core Action	Completed	2025-12-29 23:27:30	8ms
4	Ask For Approval	Core Action	Completed	2025-12-29 23:27:30	826ms
5	If If Approve	Flow Logic	Evaluates - True	2025-12-29 23:28:48	229ms
6	Send Email	Core Action	Completed	2025-12-29 23:28:48	25ms
7	Create Task IT task	Core Action	Completed	2025-12-29 23:28:48	69ms
8	Create Task Facilities task	Core Action	Completed	2025-12-29 23:28:48	53ms
9	Create Task Security task	Core Action	Completed	2025-12-29 23:28:48	55ms
10	Wait For Condition	Core Action	Waiting	2025-12-29 23:28:48	26ms

Servicenow Catalog Task - SCTASK0010023

Number: SCTASK0010023

Assigned to:

Configuration item:

Active:

Short description: Create accounts & assign hardware

Description:

Work notes: Work notes

Approval: Not Yet Requested

Priority: 4 - Low

State: Open

Request item: Pending

Requested for: Work in Progress

Post

Activities: 1 System Administrator

Impact: 2 + Low

Field changes • 2025-12-29 23:28:48

Workflow Studio

On or Off Boarding Flow

On or Off Boarding Flow

EXECUTION DETAILS

On or Off Boarding Flow

Test Run - Completed

Open flow

Open context record

Show Action Details		State	Start time	Duration
6	Send Email	Completed	2025-12-29 23:28:48	25ms
7	Create Task IT task	Core Action	Completed	69ms
8	Create Task Facilities task	Core Action	Completed	53ms
9	Create Task Security task	Core Action	Completed	55ms
10	Wait For Condition	Core Action	Completed	54ms
11	Update Record	Core Action	Completed	44ms
12	Send Email	Completed	2025-12-29 23:30:03	138ms
13	End	Flow Logic	Completed	0ms

- If Rejected test

Workflow Studio On or Off Boarding Flow + On or Off Boarding Flow Flow execution • None

EXECUTION DETAILS **On or Off Boarding Flow**

Test Run - Waiting Cancel flow Open flow Open context record

Show Action Details	State	Start time	Duration
FLOW STATISTICS	Waiting	2025-12-29 23:27:30	351ms
Run as: System Administrator	Open flow logs		

TRIGGER

Catalog Item Requested

ACTIONS

- Get Catalog Variables from on or off Boarding
- If if Req Type On Bording
- Create Record
- Ask For Approval

Core Action Completed 2025-12-29 23:27:30 31ms

Flow Logic Evaluated - True 2025-12-29 23:27:30 316ms

Core Action Completed 2025-12-29 23:27:30 8ms

Core Action Waiting 2025-12-29 23:27:30 308ms

servicenow All Favorites History Approval - Requested Item: RITM00...

Approval Requested Item: RITM0010011

Approver	Aileen Mottern	Approving	Requested Item: RITM0010011	
State	Requested			
Approval Reason	Not Yet Requested			
Description	Approved			
on or off Board	Rejected	\$0.00	1	\$0.00
Comments	Cancelled			
	No Longer Required			
	Comments			
			Post	

Activities: 1

System Administrator Aileen Mottern

Field changes • 2025-12-29 23:33:50

Workflow Studio On or Off Boarding Flow Flow • Global

EXECUTION DETAILS **On or Off Boarding Flow**

Test Run - Completed **Open flow** **Open context record**

Show Action Details **Refresh Flow Data** **State** **Start time** **⋮**

TRIGGER

Catalog Item Requested

ACTIONS

Step	Action	Type	Status	Start Time	Duration
1	Get Catalog Variables from on or off Boarding	Core Action	Completed	2025-12-29 23:33:50	18ms
2	If if Req Type On Bording	Flow Logic	Evaluated - True	2025-12-29 23:33:50	448ms
3	Create Record	Core Action	Completed	2025-12-29 23:33:50	4ms
4	Ask For Approval	Core Action	Completed	2025-12-29 23:33:50	351ms
5	If if Approve	Flow Logic	Evaluated - False	2025-12-29 23:35:21	1ms

4 ↴

Workflow Studio On Off Boarding Flow Flow • Global

EXECUTION DETAILS **On or Off Boarding Flow**

Test Run - Completed **Open flow** **Open context record**

Show Action Details **State** **Start time** **⋮**

ACTIONS

Step	Action	Type	Status	Start Time	Duration
11	Update Record	Core Action	Not Run		
12	Send Email	Core Action	Not Run		
13	End	Flow Logic	Not Run		
14	Else If if Rejected	Flow Logic	Evaluated - True	2025-12-29 23:35:21	92ms
15	Update Record	Core Action	Completed	2025-12-29 23:35:21	70ms
16	Send Email	Core Action	Completed	2025-12-29 23:35:21	21ms
17	End	Flow Logic	Completed	2025-12-29 23:35:21	0ms

ERROR HANDLER

4 ↴