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.

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2. Prerequisites

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

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3. Step 1: Service Catalog Item Creation

Catalog Item: Onboard / Offboard Employee

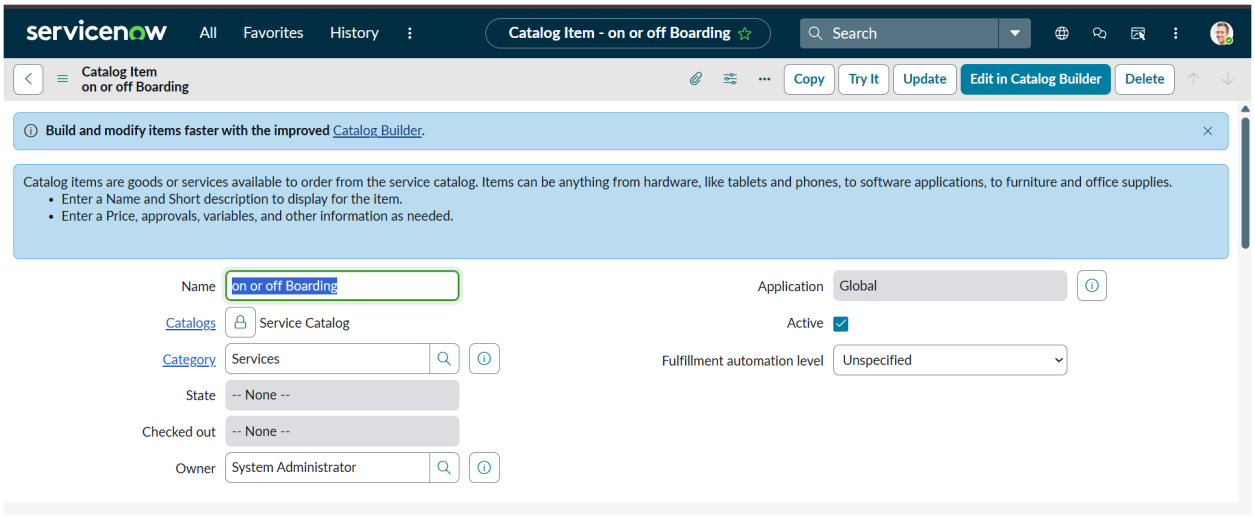
Navigation:

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*



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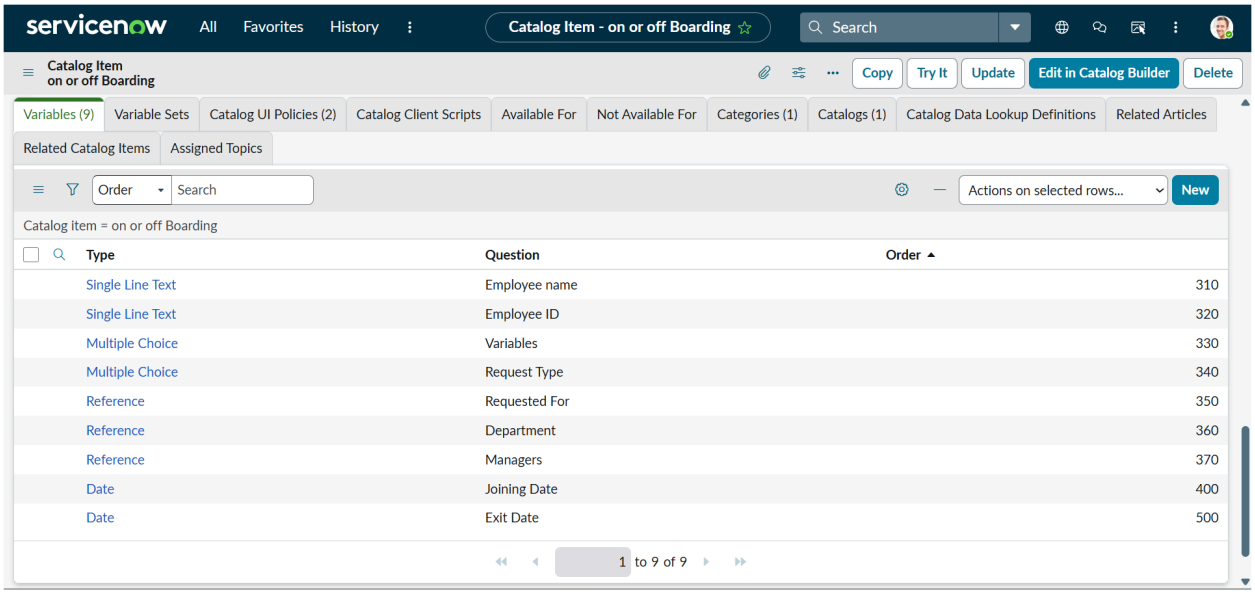
4. Step 2: Variable Configuration & UI Policies

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)

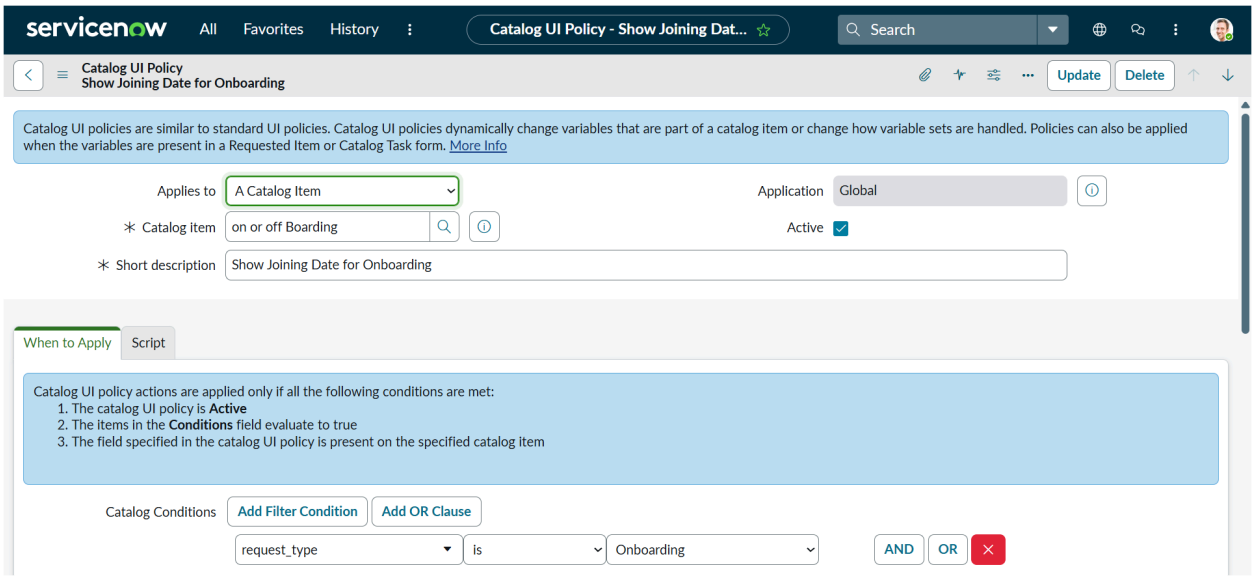


UI Policy Configuration:

Policy 1: Show Joining Date for Onboarding

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

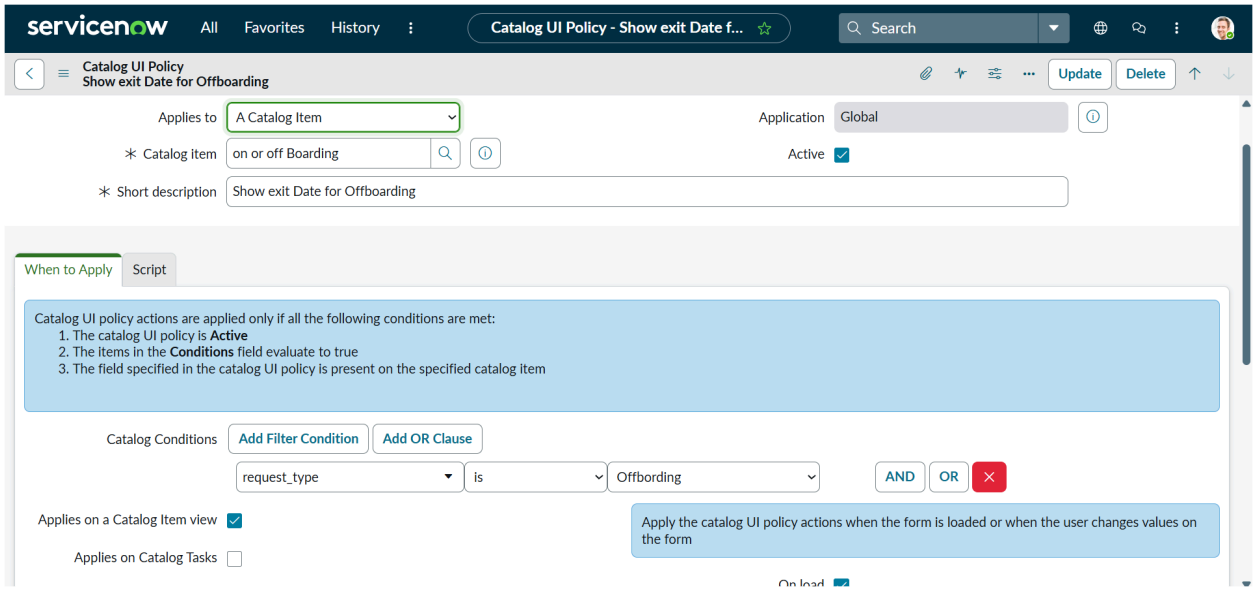
📸 *Screenshot:*



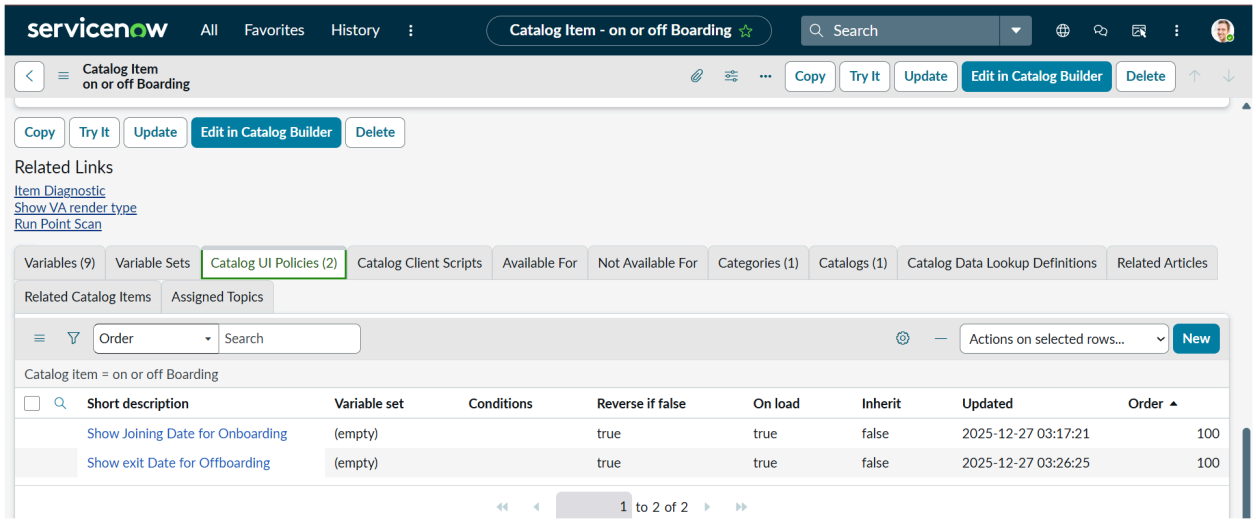
Policy 2: Show Exit Date for Offboarding

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

📸 *Screenshot:*



📸 *Screenshot:UI Policy and UI Policy Action configuration*



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5. Step 3: Flow Designer Workflow Setup

Navigation:

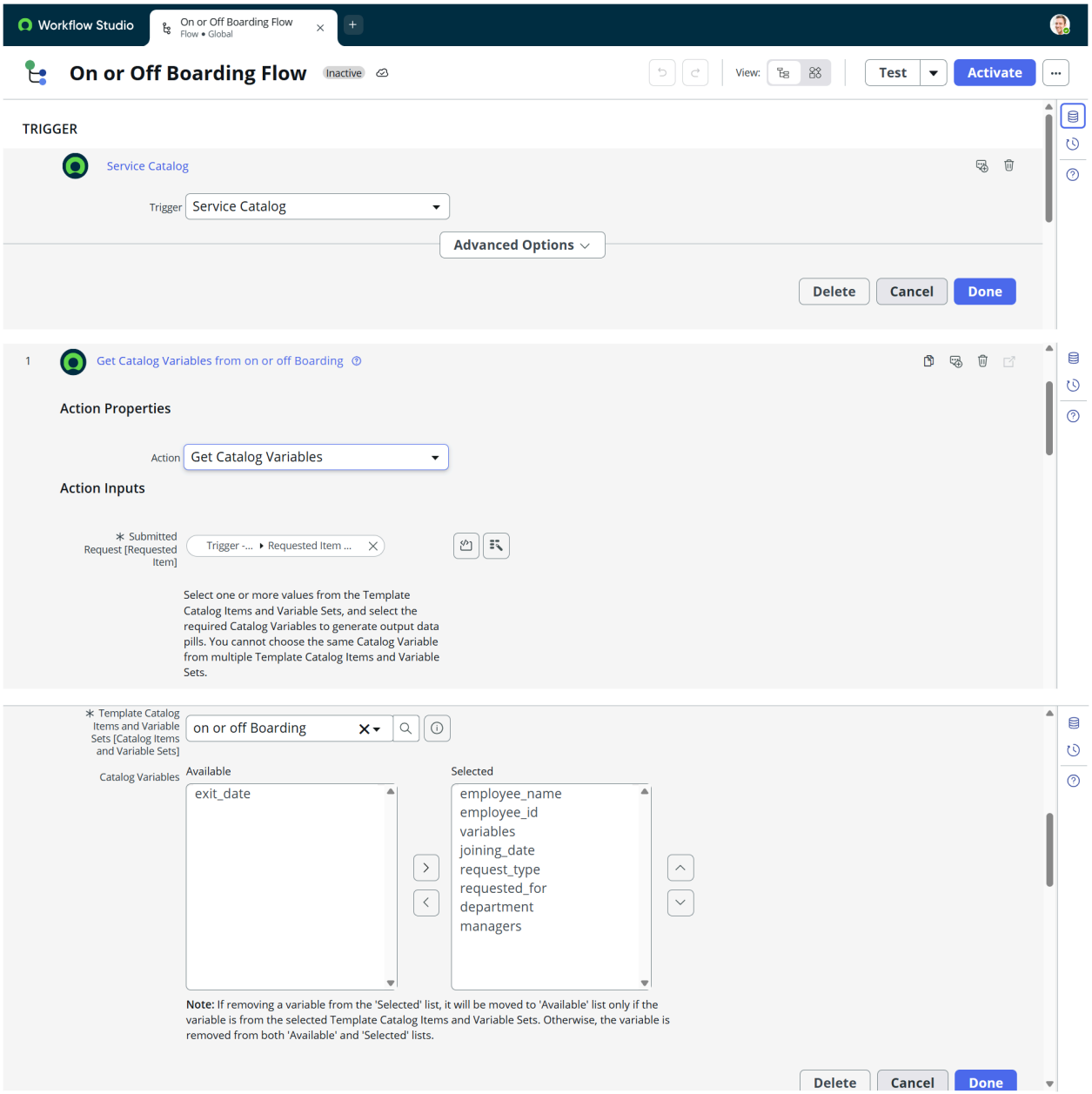
Flow Designer → New Flow

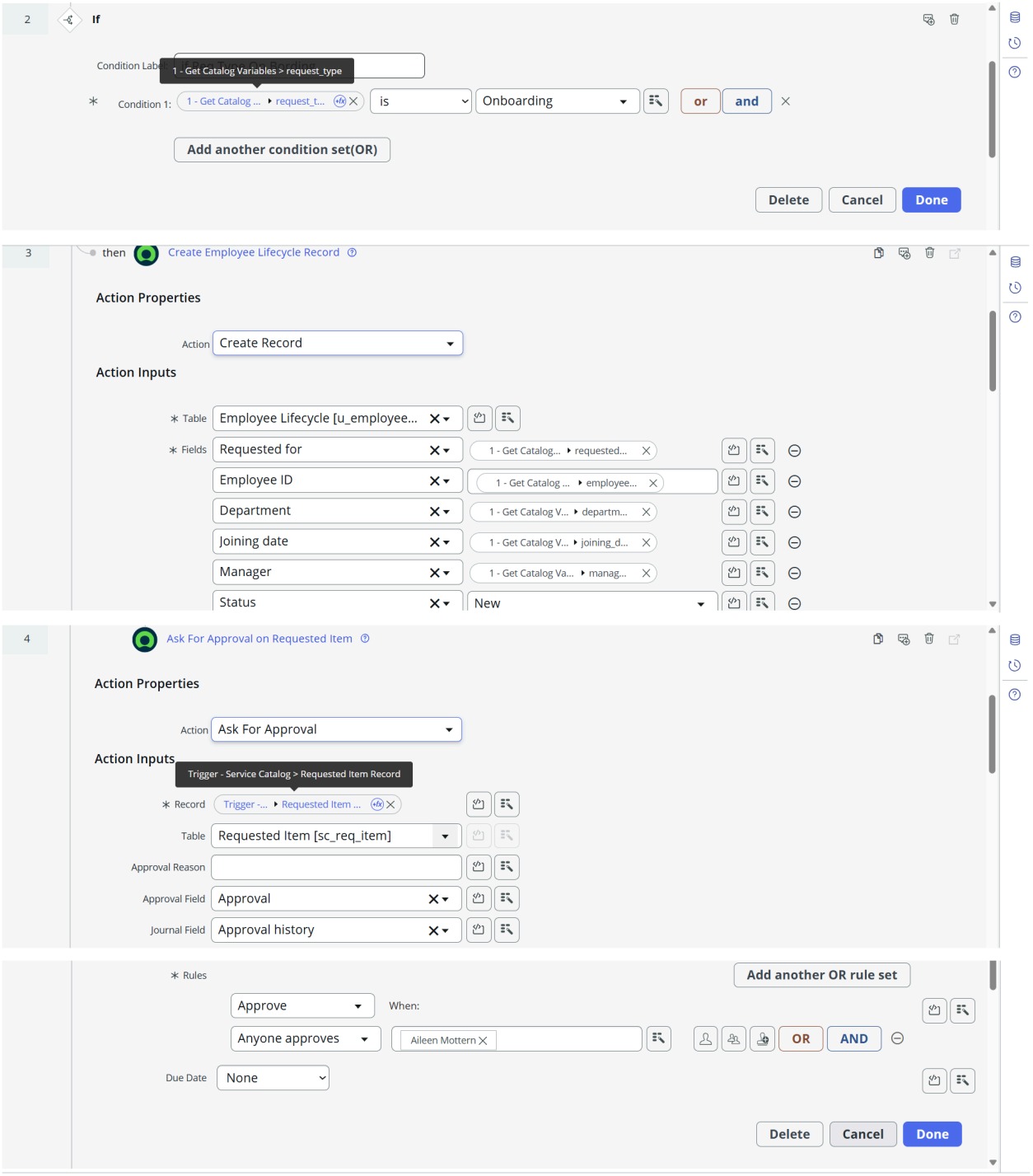
Flow Configuration:

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*



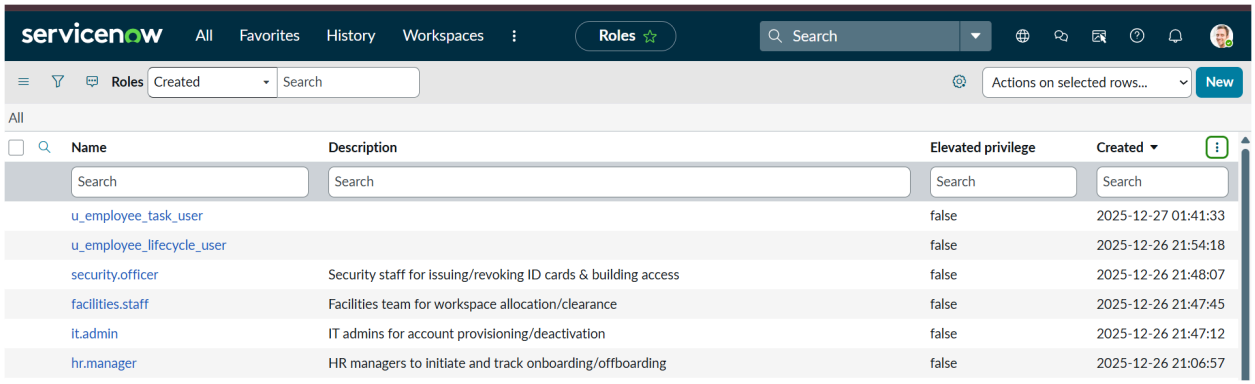


6. Step 4: Role, Group & ACL Configuration

Roles to Create:

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

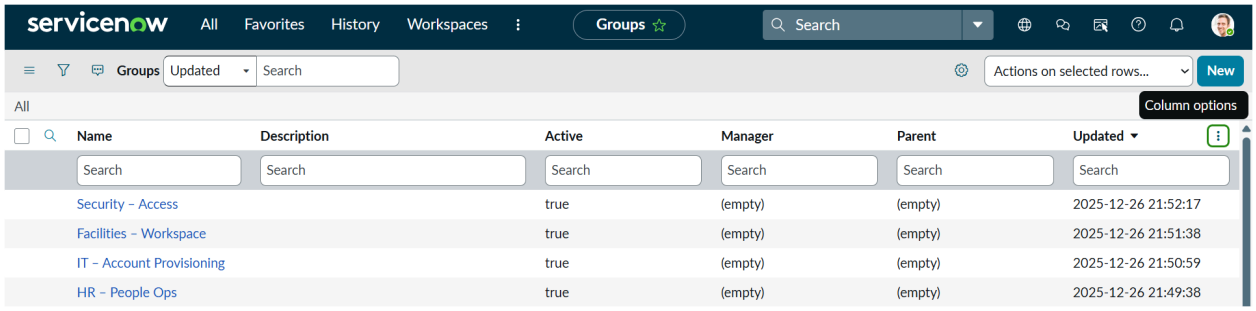
📸 *Screenshot: Role*



Groups Mapping:

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

📸 *Screenshot: Group*



ACL Configuration:

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

7. Step 5: Test Request Submissions

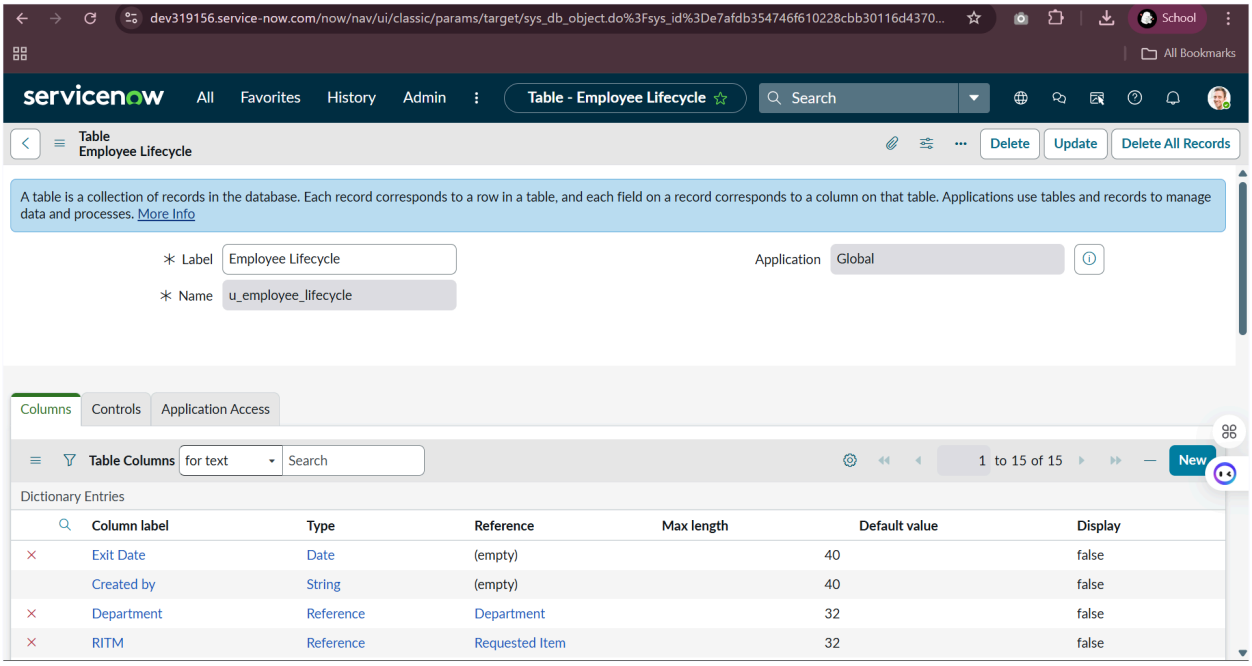
Test Scenarios:

- 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:*



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]

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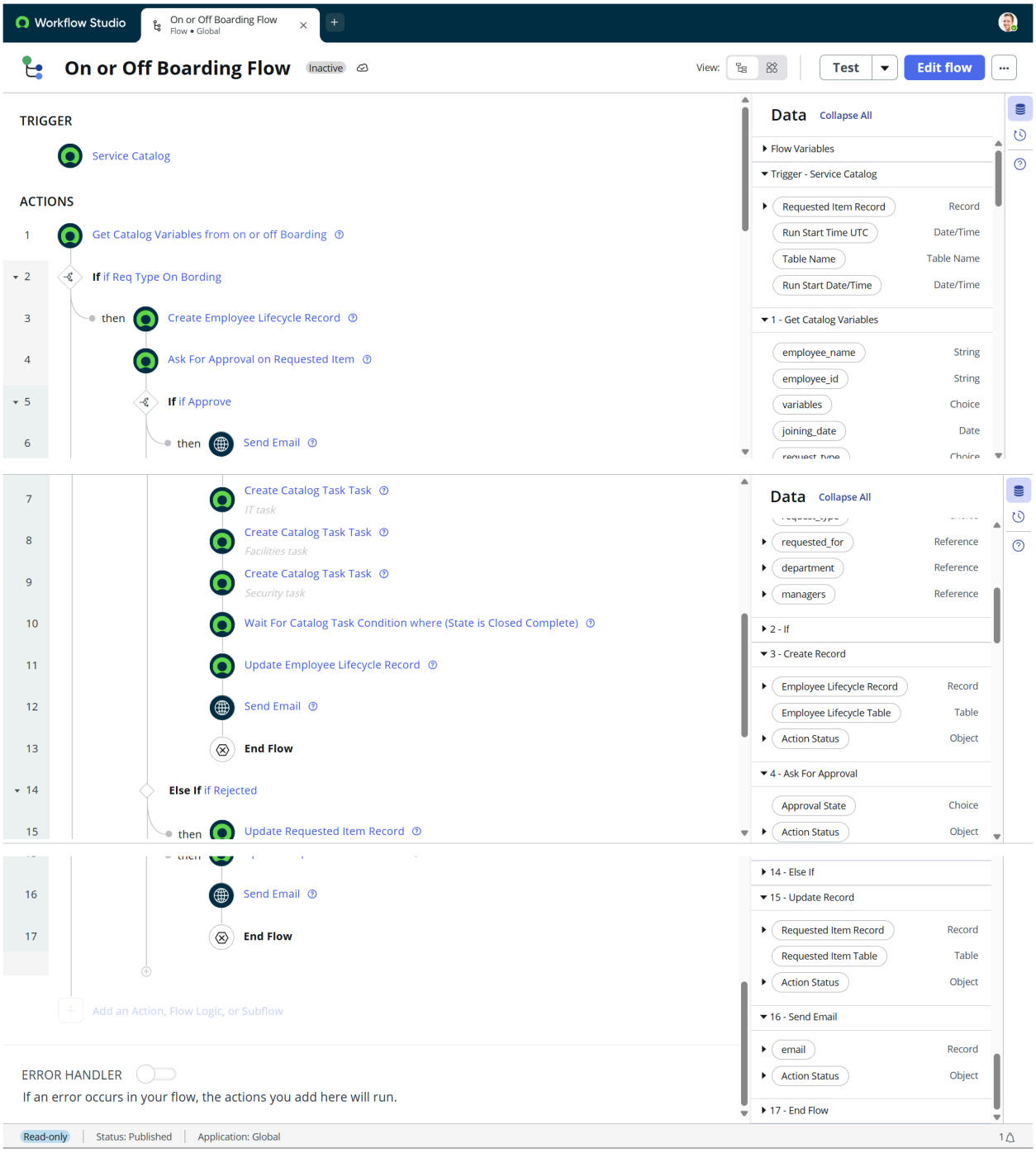
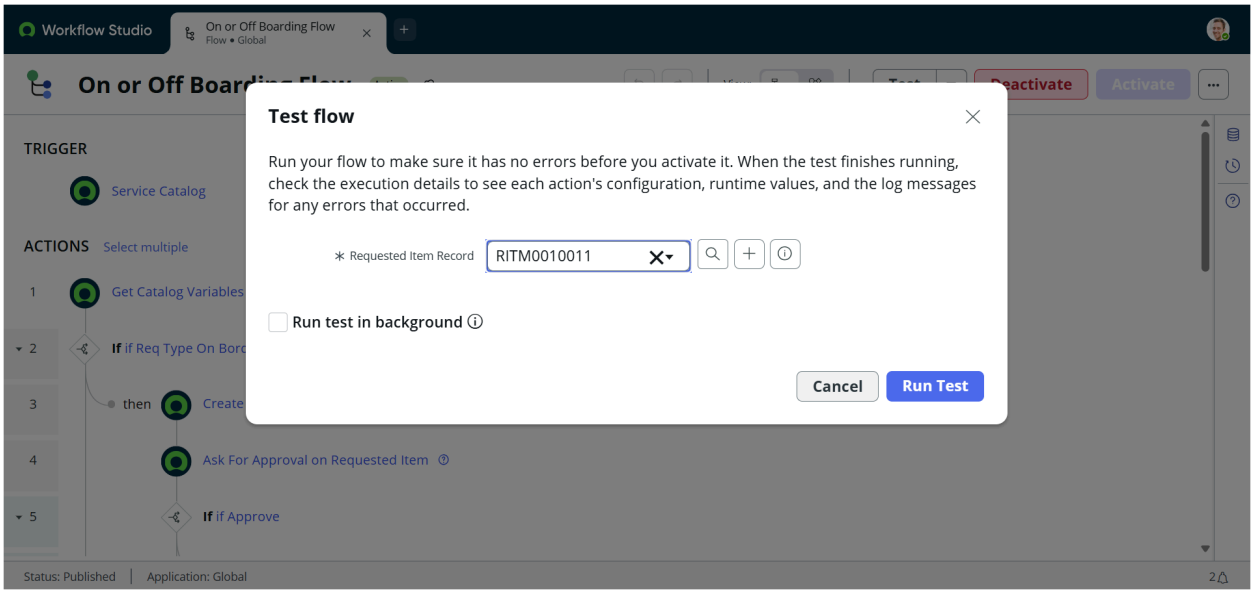
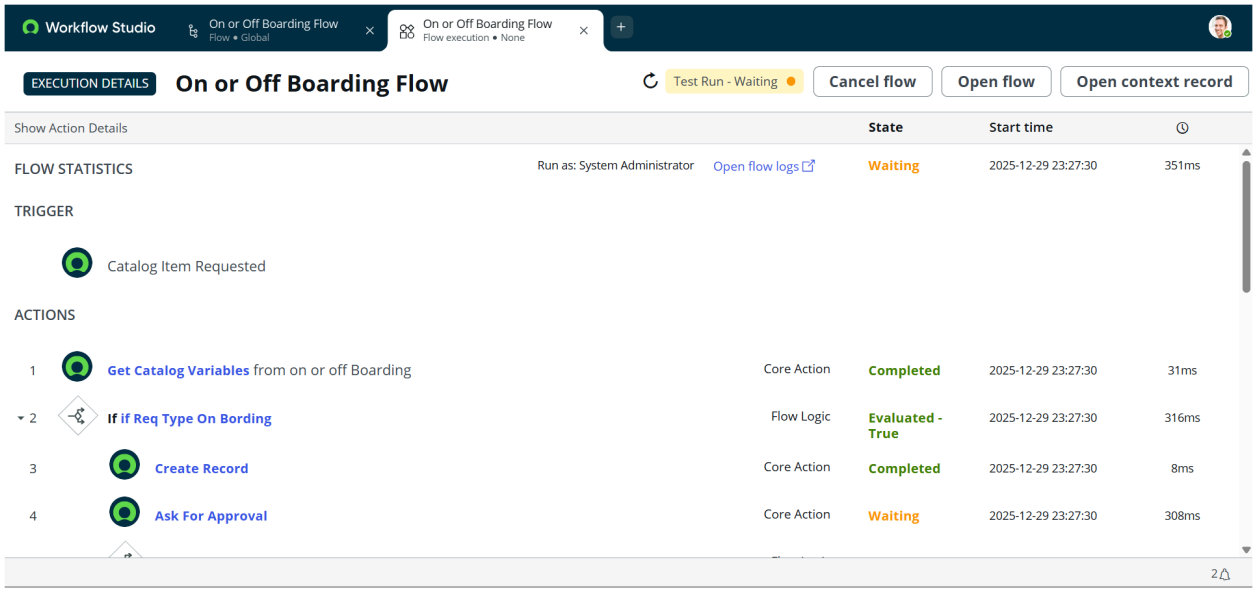
9. Setup Outcome

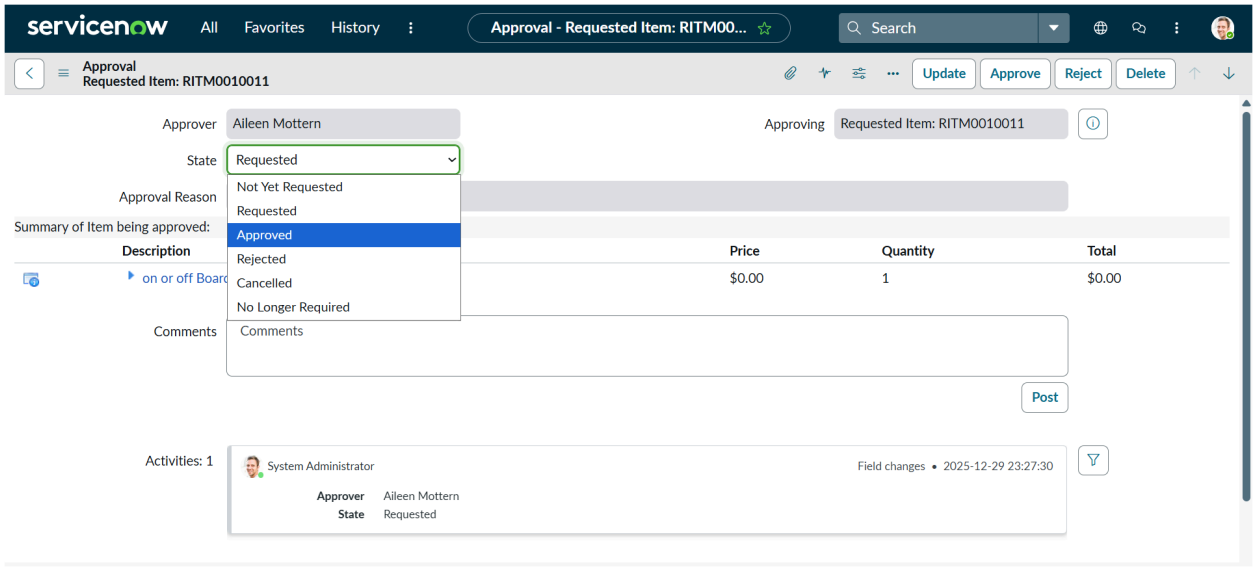
- Fully functional onboarding/offboarding automation

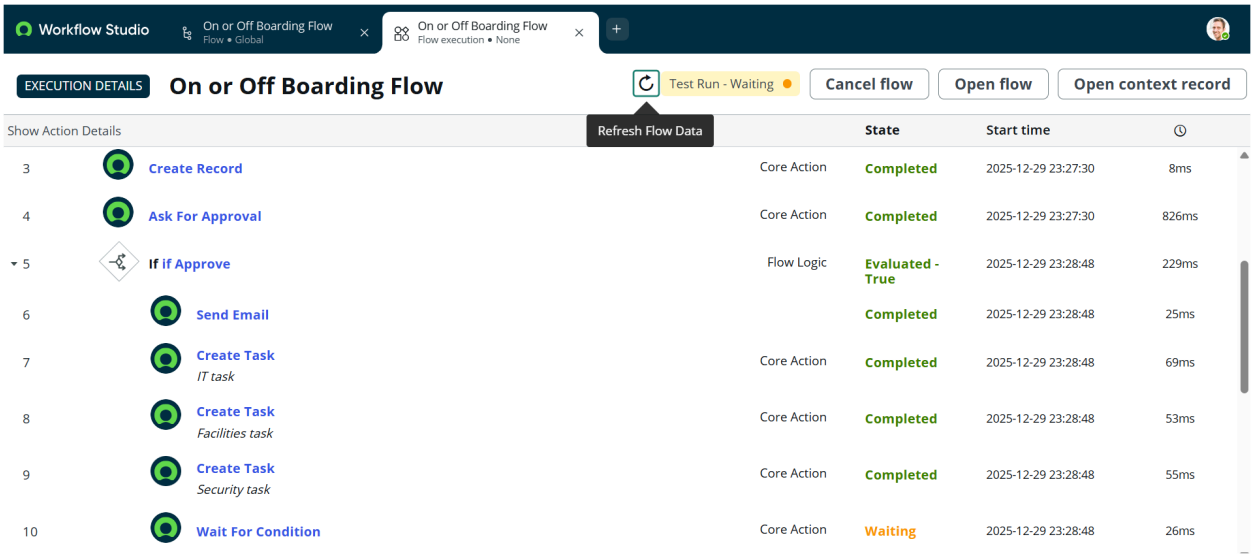


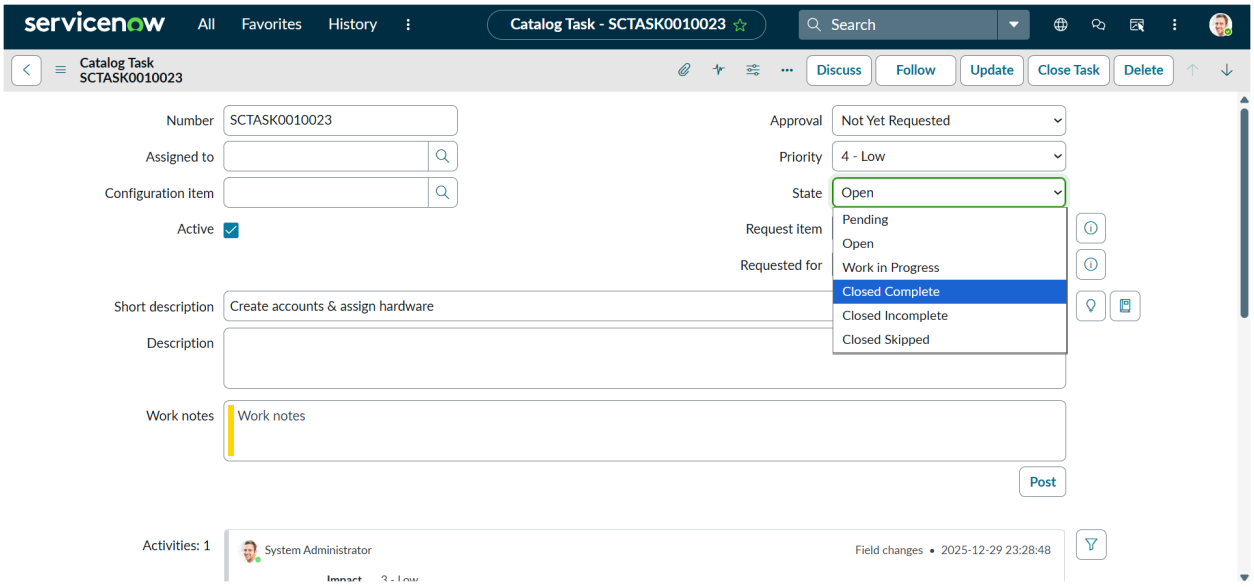
- Consistent setup across PDIs
- Ready for testing, demo, or deployment
- **If Approved test**

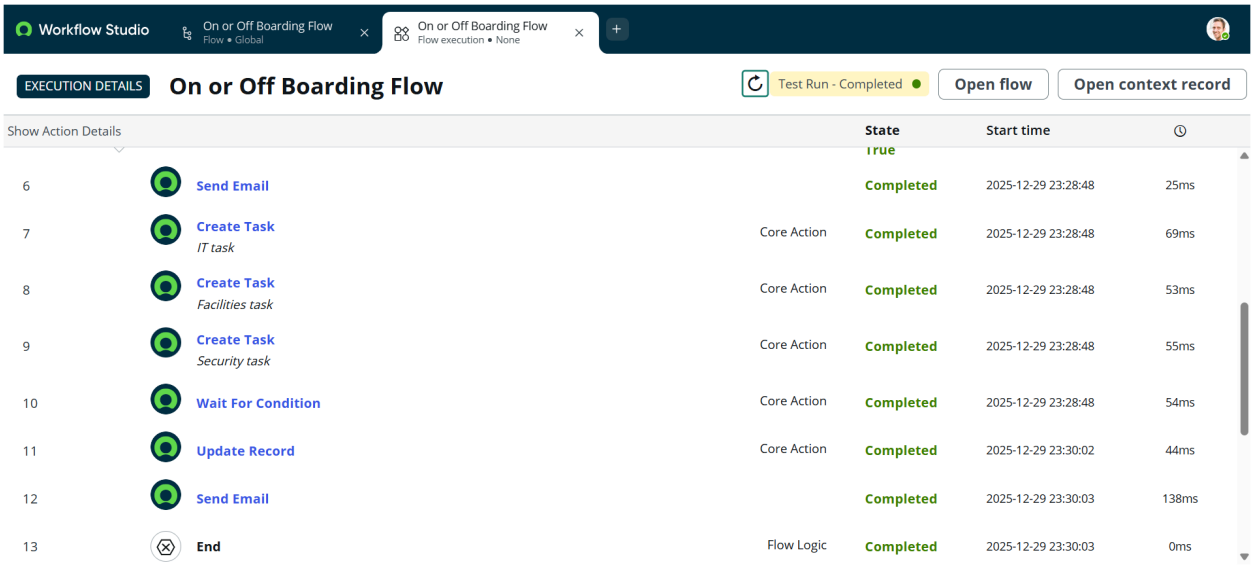

Workflow Studio
On or Off Boarding Flow
Flow • Global
On or Off Boarding Flow
Deactivate
Activate
TRIGGER
Service Catalog
ACTIONS
Select multiple
1
Get Catalog Variables
2
If if Req Type On Bord
3
then
Create
4
Ask For Approval on Requested Item
5
If if Approve
Status: Published
Application: Global
Test 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
RITM0010011
Run test in background
Cancel
Run Test


Workflow Studio
On or Off Boarding Flow
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
State
Start time
FLOW STATISTICS
Run as: System Administrator
Open flow logs
Waiting
2025-12-29 23:27:30
351ms
TRIGGER
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

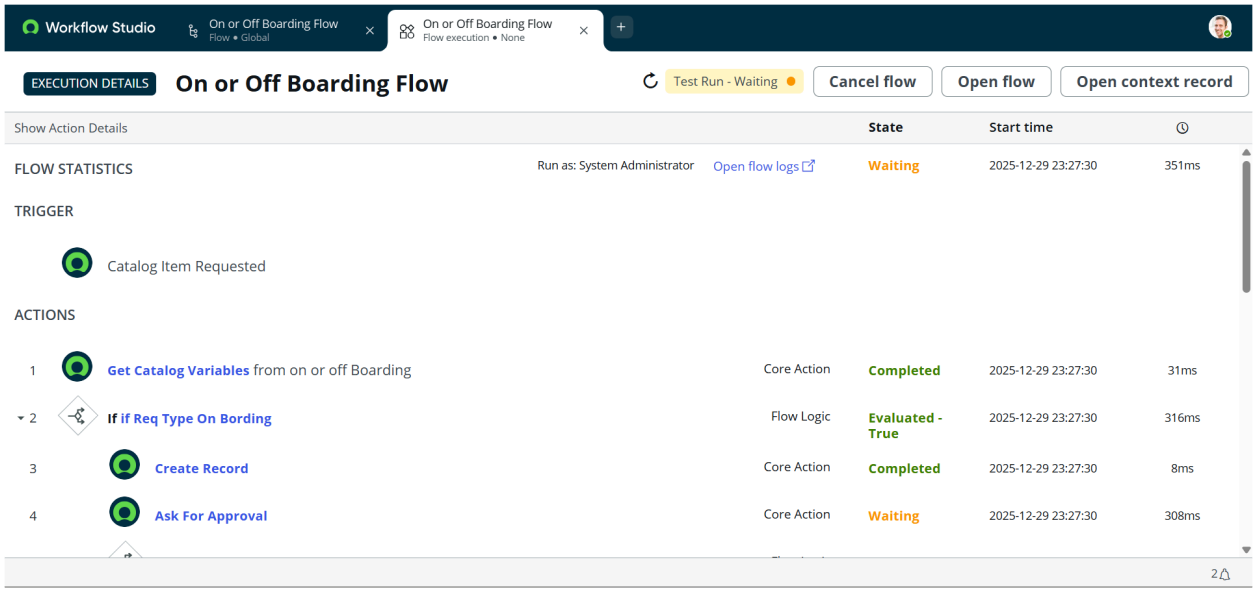

servicenow
All
Favorites
History
Approval - Requested Item: RITM00...
Search
Approval
Requested Item: RITM0010011
Update
Approve
Reject
Delete
Approver
Aileen Mottern
Approving
Requested Item: RITM0010011
State
Requested
Not Yet Requested
Requested
Approved
Rejected
Cancelled
No Longer Required
Approval Reason
Summary of Item being approved:
Description
Price
Quantity
Total
on or off Board
$0.00
1
$0.00
Comments
Comments
Post
Activities: 1
System Administrator
Field changes • 2025-12-29 23:27:30
Approver
Aileen Mottern
State
Requested

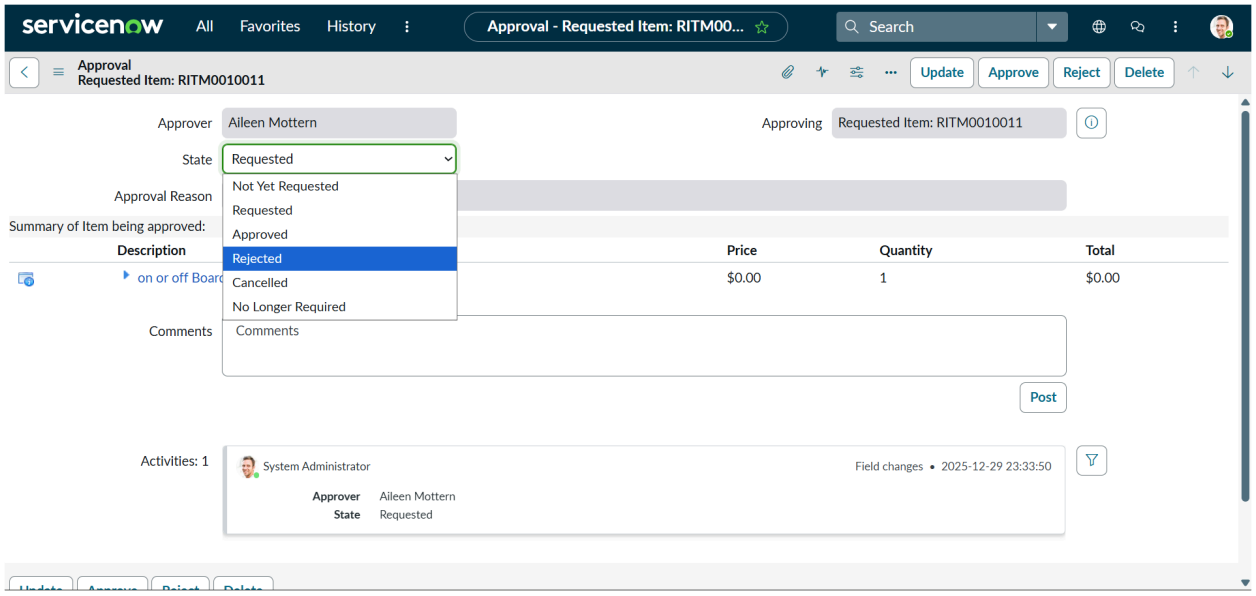

Workflow Studio
On or Off Boarding Flow
Flow • Global
On or Off Boarding Flow
Flow execution • None
EXECUTION DETAILS
On or Off Boarding Flow
Test Run - Waiting
Cancel flow
Open flow
Open context record
Refresh Flow Data
Show Action Details
State
Start time
3 Create Record Core Action Completed 2025-12-29 23:27:30 8ms
4 Ask For Approval Core Action Completed 2025-12-29 23:27:30 826ms
5 If if Approve Flow Logic Evaluated - True 2025-12-29 23:28:48 229ms
6 Send Email 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

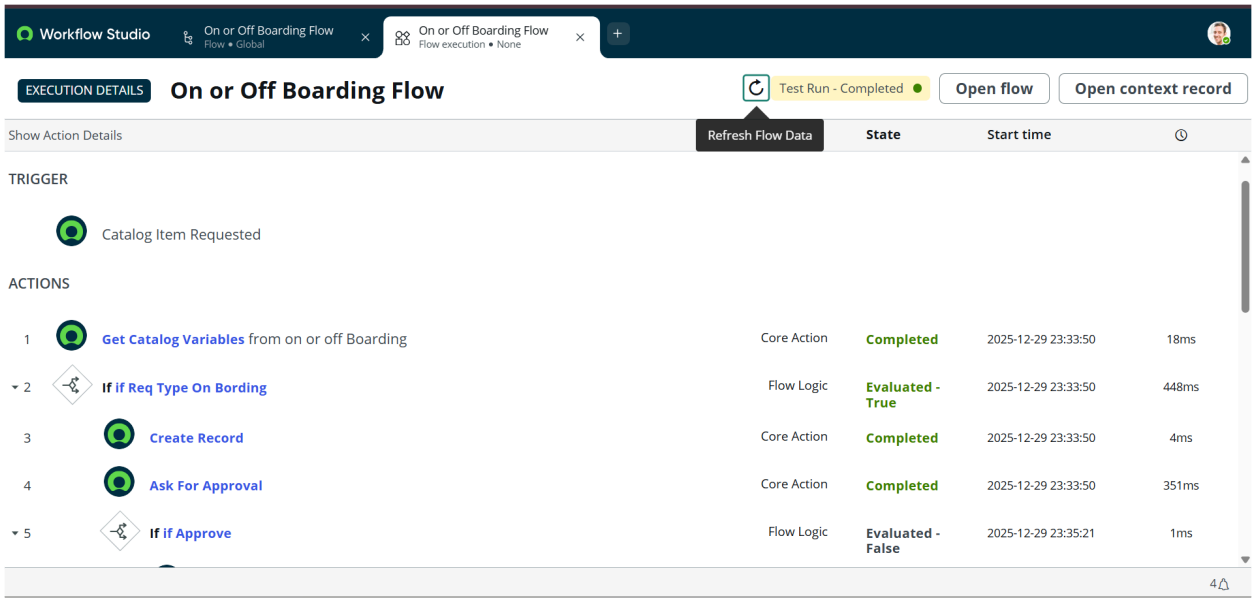


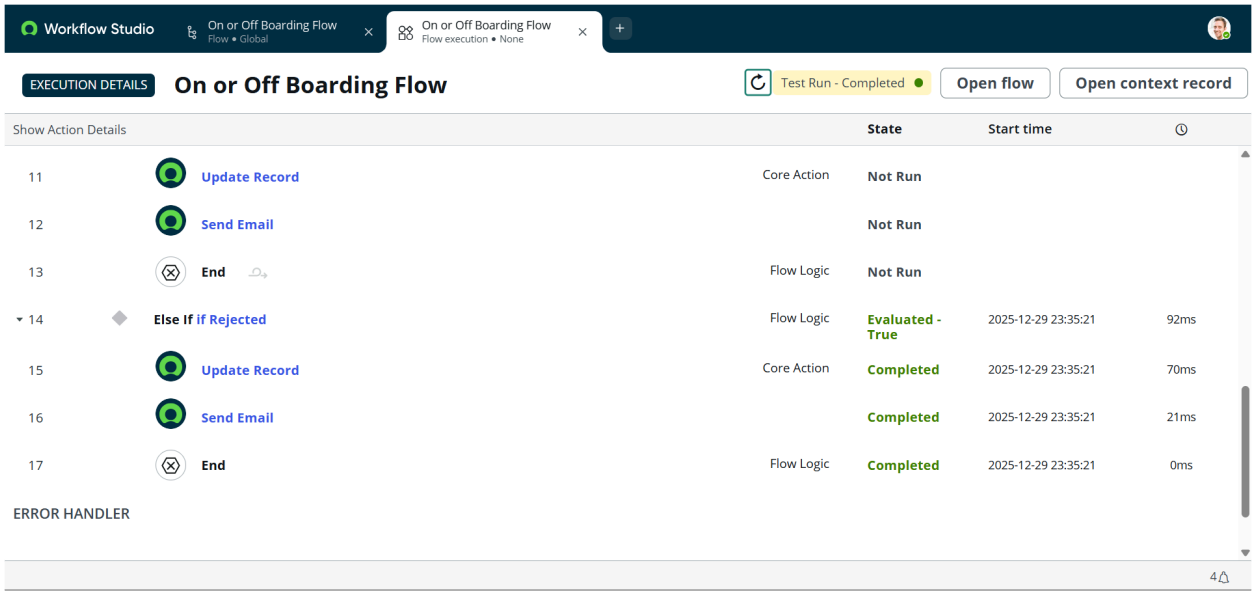


- **If Rejected test**


Workflow Studio
On or Off Boarding Flow
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
State
Start time
FLOW STATISTICS
Run as: System Administrator
Open flow logs
Waiting
2025-12-29 23:27:30
351ms
TRIGGER
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...
Search
Approval
Requested Item: RITM0010011
Update
Approve
Reject
Delete
Approver
Aileen Mottern
Approving
Requested Item: RITM0010011
State
Requested
Not Yet Requested
Requested
Approved
Rejected
Cancelled
No Longer Required
Approval Reason
Summary of Item being approved:
Description
Price
Quantity
Total
on or off Board
$0.00
1
$0.00
Comments
Comments
Post
Activities: 1
System Administrator
Field changes • 2025-12-29 23:33:50
Approver Aileen Mottern
State Requested


Workflow Studio
On or Off Boarding Flow
Flow • Global
On or Off Boarding Flow
Flow execution • None
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
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 or Off Boarding Flow
Flow • Global
On or Off Boarding Flow
Flow execution • None
EXECUTION DETAILS
On or Off Boarding Flow
Test Run - Completed
Open flow
Open context record
Show Action Details
State
Start time
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 2025-12-29 23:35:21 92ms
15 Update Record Core Action Completed 2025-12-29 23:35:21 70ms
16 Send Email Completed 2025-12-29 23:35:21 21ms
17 End Flow Logic Completed 2025-12-29 23:35:21 0ms
ERROR HANDLER
4