

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

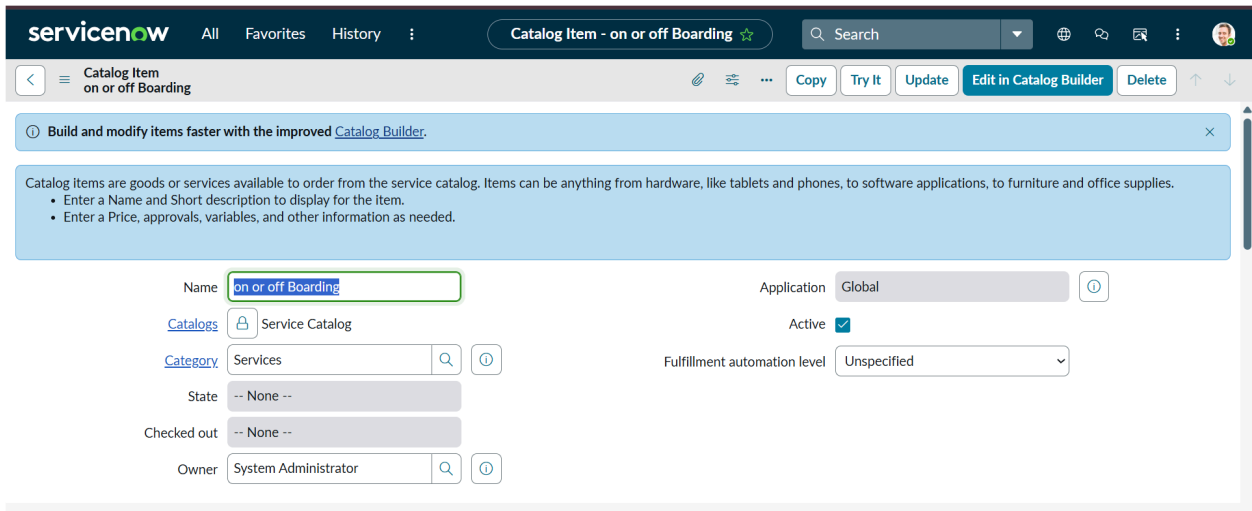
Navigation:

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 interface for creating a catalog item. The header includes the ServiceNow logo, navigation tabs (All, Favorites, History), and a search bar. The breadcrumb trail indicates the current path: Catalog Item - on or off Boarding. A notification bar at the top states: "Build and modify items faster with the improved Catalog Builder." Below this, a blue box provides instructions: "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. • Enter a Name and Short description to display for the item. • Enter a Price, approvals, variables, and other information as needed." The form fields are as follows: Name: "on or off Boarding" (highlighted with a green border); Application: "Global"; Catalogs: "Service Catalog" (with a link icon); Category: "Services" (with a search icon and a help icon); State: "-- None --"; Checked out: "-- None --"; Owner: "System Administrator" (with a search icon and a help icon); Active: checked (checkbox); Fulfillment automation level: "Unspecified" (dropdown menu).

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 'Catalog Item - on or off Boarding' configuration page in ServiceNow. The page includes a search bar, navigation tabs, and a table of related catalog items.

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

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. It includes a description of catalog UI policies and a configuration section with the following details:

- Applies to:** A Catalog Item
- Application:** Global
- * Catalog item:** on or off Boarding
- Active:** ☒
- * Short description:** Show Joining Date for Onboarding

When to Apply: Script

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

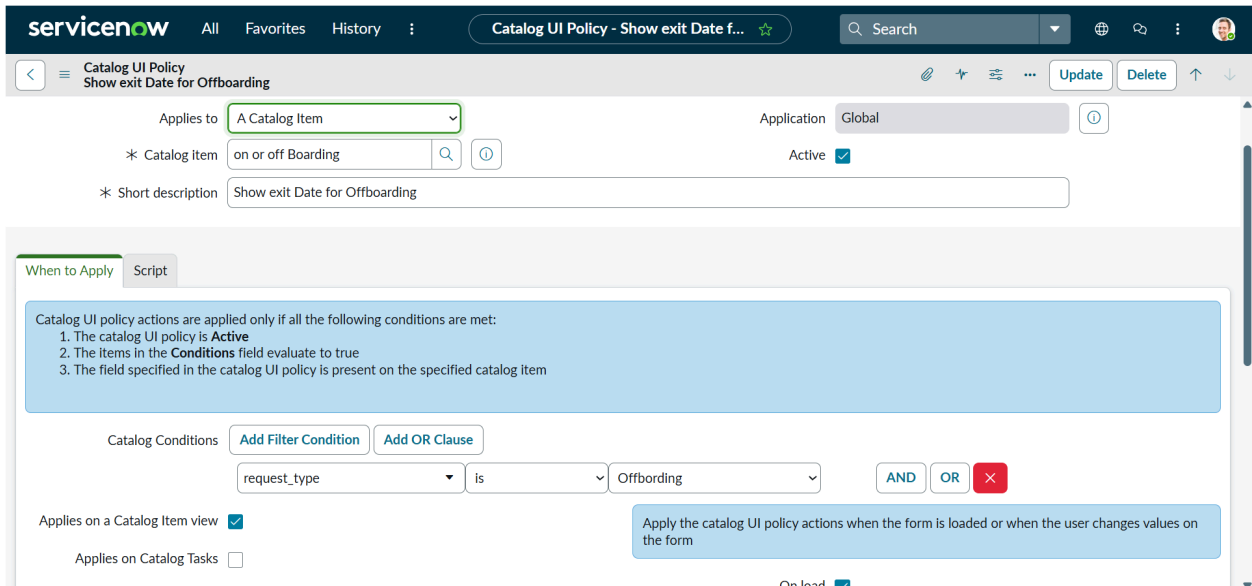
Catalog Conditions:

- request_type is Onboarding

Policy 2: Show Exit Date for Offboarding

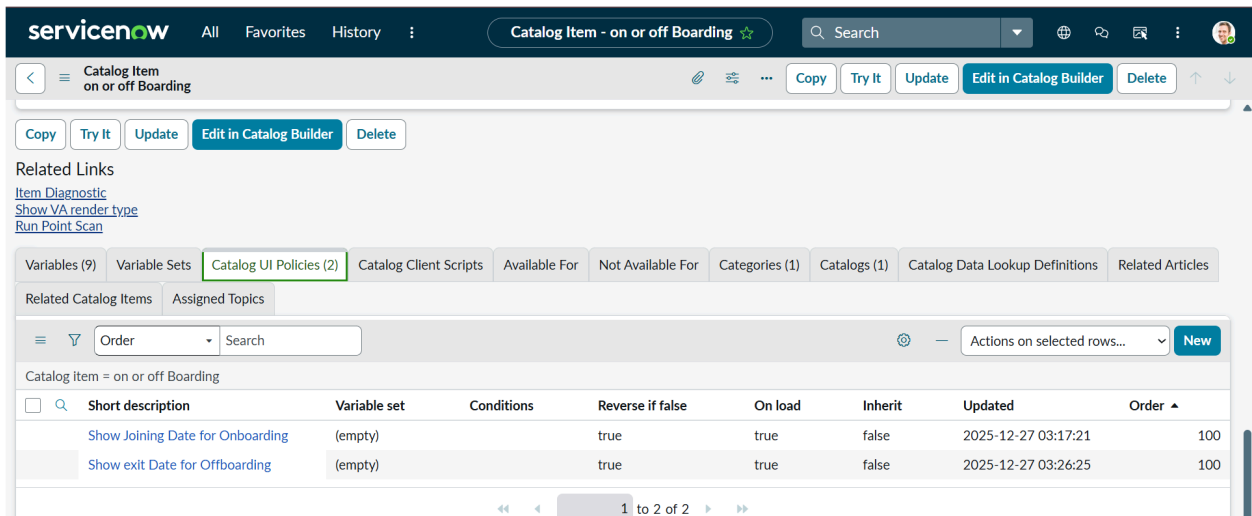
- Condition: Request Type = Offboarding
- Action: Exit Date → Visible = True

Screenshot:



The screenshot shows the 'Catalog UI Policy' configuration page in ServiceNow. The title is 'Catalog UI Policy - Show exit Date for Offboarding'. The 'Applies to' dropdown is set to 'A Catalog Item'. The 'Application' is 'Global'. The 'Active' checkbox is checked. The 'Short description' is 'Show exit Date for Offboarding'. The 'When Apply' tab is selected, showing a list of conditions: '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'. Below the conditions, there are buttons for 'Add Filter Condition' and 'Add OR Clause'. A condition is added: 'request_type' is 'Offboarding'. The 'Applies on a Catalog Item view' checkbox is checked. The 'Applies on Catalog Tasks' checkbox is unchecked. A note states: 'Apply the catalog UI policy actions when the form is loaded or when the user changes values on the form'. The 'On load' checkbox is checked.

Screenshot: UI Policy and UI Policy Action configuration



The screenshot shows the 'Catalog Item' configuration page in ServiceNow. The title is 'Catalog Item - on or off Boarding'. The 'Copy', 'Try It', 'Update', 'Edit in Catalog Builder', and 'Delete' buttons are visible. The 'Related Links' section includes 'Item Diagnostic', 'Show VA render type', and 'Run Point Scan'. The 'Variables (9)' tab is selected, showing 'Catalog UI Policies (2)'. The 'Related Catalog Items' tab is selected, showing a table of related items.

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 03:17:21	100
Show exit Date for Offboarding	(empty)		true	true	false	2025-12-27 03:26:25	100

5. Step 3: Flow Designer Workflow Setup

Navigation:

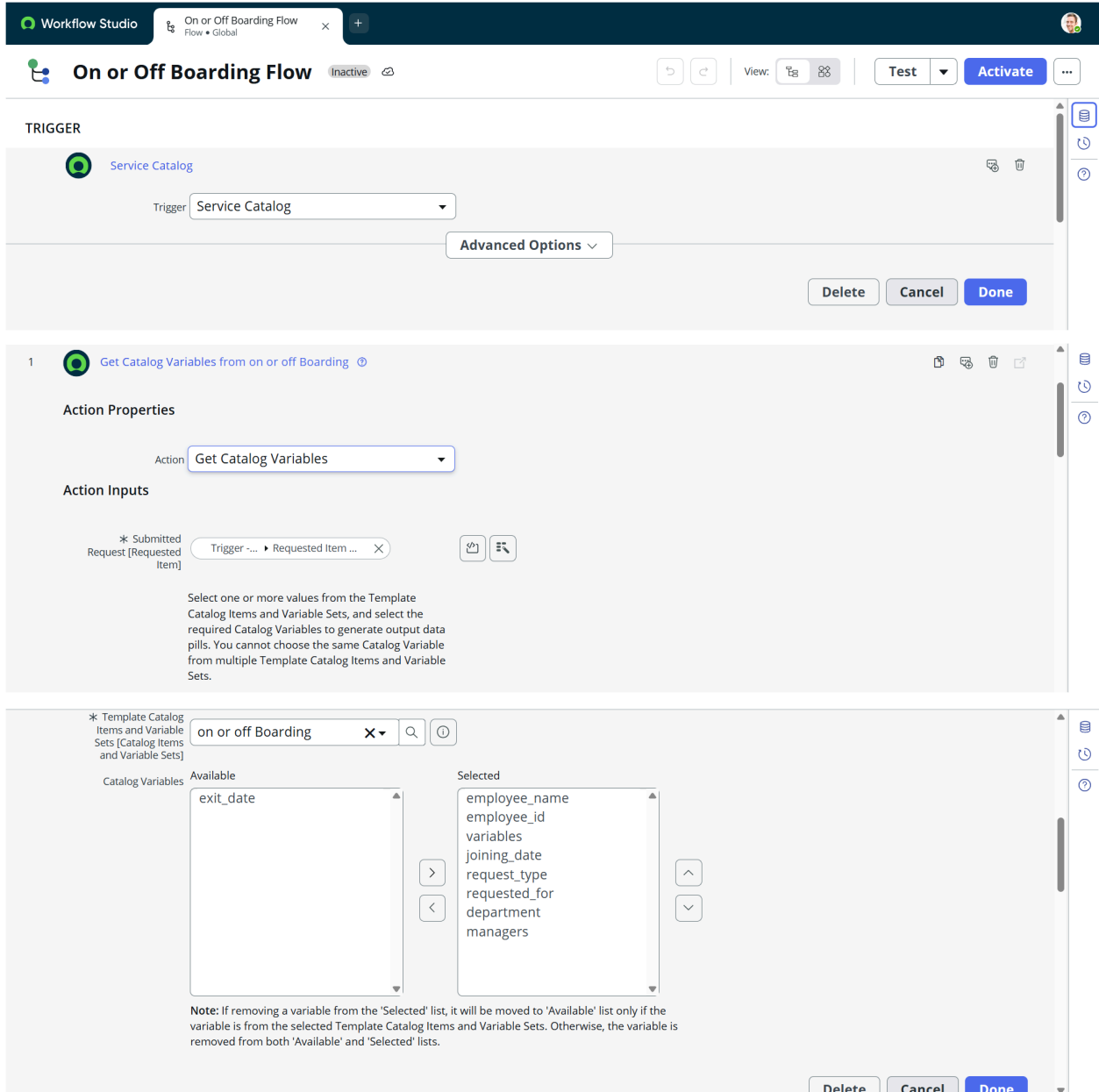
Flow Designer → New Flow

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**



Workflow Studio On or Off Boarding Flow Flow • Global

On or Off Boarding Flow Inactive

View: [Diagram] [Code]

Test Activate

TRIGGER

Service Catalog

Trigger: Service Catalog

Advanced Options

Delete Cancel Done

1 Get Catalog Variables from on or off Boarding

Action Properties

Action: Get Catalog Variables

Action Inputs

* Submitted Request (Requested Item)

Trigger -> Requested Item

Select one or more values from the Template Catalog Items and Variable Sets, and select the required Catalog Variables to generate output data pills. You cannot choose the same Catalog Variable from multiple Template Catalog Items and Variable Sets.

* Template Catalog Items and Variable Sets [Catalog Items and Variable Sets]

on or off Boarding

Catalog Variables Available

exit_date

Selected

employee_name
employee_id
variables
joining_date
request_type
requested_for
department
managers

Note: If removing a variable from the 'Selected' list, it will be moved to 'Available' list only if the variable is from the selected Template Catalog Items and Variable Sets. Otherwise, the variable is removed from both 'Available' and 'Selected' lists.

Delete Cancel Done

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

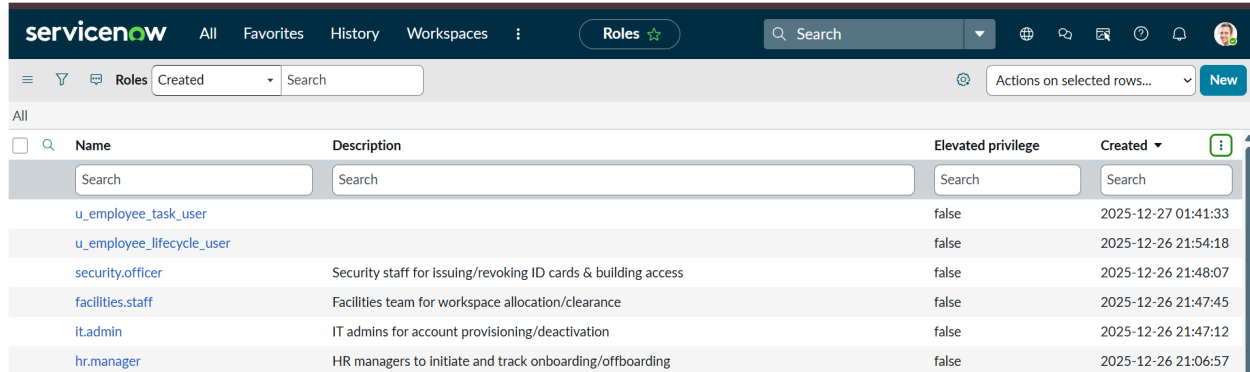
4
Ask For Approval on Requested Item
Action Properties
Action: Ask For Approval
Action Inputs
Trigger - Service Catalog > Requested Item Record
* Record: Trigger -... > Requested Item ...
Table: Requested Item [sc_req_item]
Approval Reason:
Approval Field: Approval
Journal Field: Approval history
* Rules
Approve When: Anyone approves Aileen Mottern
Due Date: None
Add another OR rule set
Delete Cancel Done

6. Step 4: Role, Group & ACL Configuration

Roles to Create:

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

 Screenshot: Role




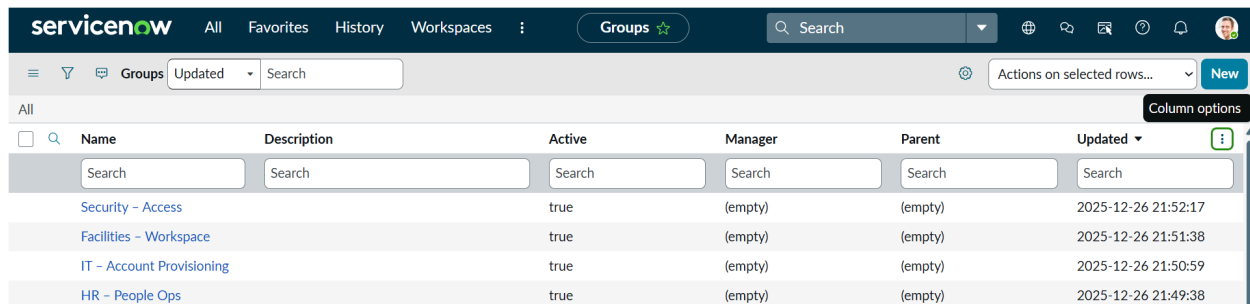
The screenshot shows the ServiceNow Roles page. The header includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces), a Roles filter, a search bar, and a 'New' button. The main table lists roles with columns for Name, Description, Elevated privilege, and Created. The roles listed are u_employee_task_user, u_employee_lifecycle_user, security.officer, facilities.staff, it.admin, and hr.manager.

Name	Description	Elevated privilege	Created
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



The screenshot shows the ServiceNow Groups page. The header includes the ServiceNow logo, navigation tabs (All, Favorites, History, Workspaces), a Groups filter, a search bar, and a 'New' button. The main table lists groups with columns for Name, Description, Active, Manager, Parent, and Updated. The groups listed are Security - Access, Facilities - Workspace, IT - Account Provisioning, and HR - People Ops.

Name	Description	Active	Manager	Parent	Updated
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

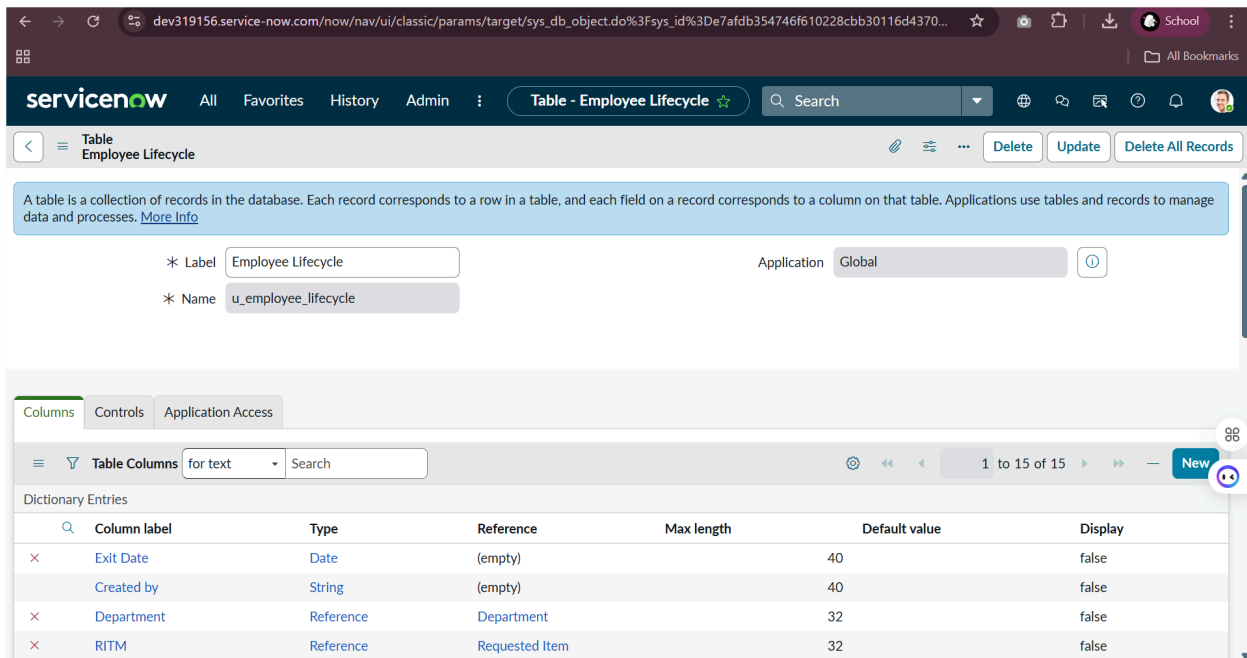
Test Scenarios:

- 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:



A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label Employee Lifecycle Application Global

* Name u_employee_lifecycle

Columns Controls Application Access

Table Columns for text Search

1 to 15 of 15 New

Column label	Type	Reference	Max length	Default value	Display
Exit Date	Date	(empty)	40	false	false
Created by	String	(empty)	40	false	false
Department	Reference	Department	32	false	false
RITM	Reference	Requested Item	32	false	false

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

Workflow Studio On or Off Boarding Flow Flow • Global

On or Off Boarding Flow Inactive

View: [Icon] [Icon] Test Edit flow

TRIGGER

Service Catalog

ACTIONS

- 1 Get Catalog Variables from on or off Boarding
- 2 If if Req Type On Bording
- 3 then Create Employee Lifecycle Record
- 4 Ask For Approval on Requested Item
- 5 If if Approve
- 6 then Send Email
- 7 Create Catalog Task Task (IT task)
- 8 Create Catalog Task Task (Facilities task)
- 9 Create Catalog Task Task (Security task)
- 10 Wait For Catalog Task Condition where (State is Closed Complete)
- 11 Update Employee Lifecycle Record
- 12 Send Email
- 13 End Flow
- 14 Else If if Rejected
- 15 then Update Requested Item Record
- 16 Send Email
- 17 End Flow

ERROR HANDLER

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

Read-only | Status: Published | Application: Global

Data Collapse All

Flow Variables

Trigger - Service Catalog

Requested Item Record Record

Run Start Time UTC Date/Time

Table Name Table Name

Run Start Date/Time Date/Time

1 - Get Catalog Variables

employee_name String

employee_id String

variables Choice

joining_date Date

request_type Choice

requested_for Reference

department Reference

managers Reference

2 - If

3 - Create Record

Employee Lifecycle Record Record

Employee Lifecycle Table Table

Action Status Object

4 - Ask For Approval

Approval State Choice

Action Status Object

14 - Else If

15 - Update Record

Requested Item Record Record

Requested Item Table Table

Action Status Object

16 - Send Email

email Record

Action Status Object

17 - End Flow

- 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

Reactivate

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

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

Status: Published

Application: Global

2

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

2025-12-29 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

2

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

⌵

Approval Reason

Not Yet Requested

Requested

Approved

Rejected

Cancelled

No Longer Required

Summary of Item being approved:

Description

on or off Boarding

Price

\$0.00

Quantity

1

Total

\$0.00

Comments

Comments

Post

Activities: 1

System Administrator

Field changes • 2025-12-29 23:27:30









⌵

Approver

Aileen Mottern

State

Requested

Show Action Details		Refresh Flow Data		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

Workflow Studio

On or Off Boarding Flow

On or Off Boarding Flow

On or Off Boarding Flow

Flow execution • Global

Flow execution • None

+

EXECUTION DETAILS

On or Off Boarding Flow

Test Run - Completed

Open flow

Open context record

Show Action Details		State	Start time	
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 Completed	2025-12-29 23:28:48	54ms
11	Update Record	Core Action Completed	2025-12-29 23:30:02	44ms
12	Send Email	Completed	2025-12-29 23:30:03	138ms
13	End	Flow Logic Completed	2025-12-29 23:30:03	0ms

- If Rejected test

Workflow Studio

On or Off Boarding Flow

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

2025-12-29 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

2

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

Approval Reason

Not Yet Requested

Requested

Approved

Rejected

Cancelled

No Longer Required

Summary of Item being approved:

Description

on or off Boarding

Price

Quantity

Total

Comments

Comments

Post

Activities: 1

System Administrator

Field changes

2025-12-29 23:33:50

⌕

Approver

Aileen Mottern

State

Requested

Update

Approve

Reject

Delete

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