

Capstone Project: Task 3 Solution

Automate Service Catalog Item Fulfillment

Instructions: Import a Strawberry sFone item into the Service Catalog to be requested and develop a flow to support and complete the fulfillment process.

 **Note:** Refer to Module 5: Configure Self Service

A. Import a Service Catalog Item

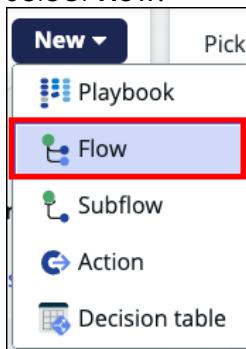
Use the Update Set process to bring in an already developed Strawberry Service Catalog item.

1. Navigate to **All > System Update Sets > Retrieved Update Sets**.
2. Under **Related Links**, select **Import Update Set from XML**.
3. Choose the file **(cd_sfone_catalog_item.xml)** and select **Upload**.
-  **Note:** The Cloud Dimensions sFone update set XML file now appears in the Retrieved Update Sets list with a State of Loaded.
4. Open the **Strawberry sFone** record.
5. Select **Preview Update Set**.
6. **Close** the Update Set Preview dialog box.
7. Select **Commit Update Set**.
8. **Close** the Update Set Commit dialog box.
9. Return to the **Retrieved Update Set record** has the State of Committed – OR – return to the **Retrieved Update Sets list** and confirm the State of the Strawberry sFone update set is **Committed**.

B. Create a flow

To support the fulfillment of incoming Service Catalog requests for the Strawberry sFone item, create a new Flow.

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Make sure the Flows button is selected, then select the **New** button.
3. Select **Flow**.



4. Populate the form with the following information:
 - Name: **Strawberry Workflow**
 - Select Show additional properties > Run As: **System User**
5. Select **Build Flow**.

Let's get the details for your flow

Flow name *: **Strawberry Workflow**

Description:
Describe your flow.

Application *:
Global

Hide additional properties

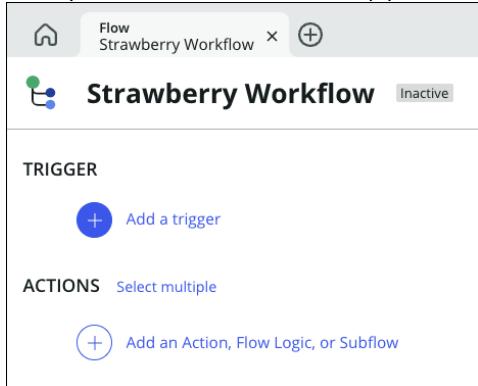
Protection:
-- None --

Run as:
System user

Flow priority default:
Medium (default)

Cancel **Build flow**

6. Verify the **Flows** interface appears.



Flow
Strawberry Workflow Inactive

Strawberry Workflow

TRIGGER

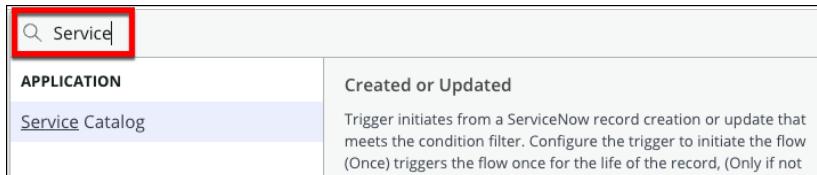
ACTIONS Select multiple

C. Define a Trigger to Activate the Flow

1. Select the **plus (+) icon** to the left of **Add a Trigger**.



2. Select **Service Catalog** from the Application section.

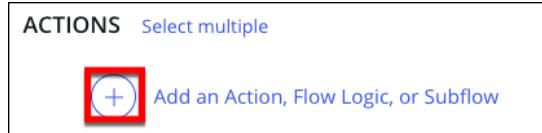


Service	
APPLICATION	Created or Updated
Service Catalog	Trigger initiates from a ServiceNow record creation or update that meets the condition filter. Configure the trigger to initiate the flow (Once) triggers the flow once for the life of the record, (Only if not

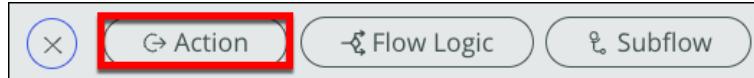
3. Select **Done** to complete the Service Catalog trigger.

D. Add an Action to Ask for Approval of the Requested Item

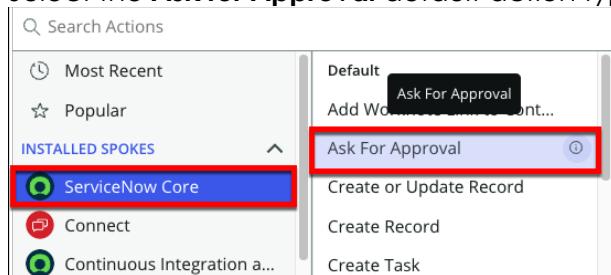
- Under the **ACTIONS** section, select the **plus (+) icon** to the left of **Add an Action, Flow Logic, or Subflow**.



- Select **Action**.



- Select the **Ask for Approval** default action type within the **ServiceNow Core Installed Spoke**.



- Choose the **Requested Item Record** to update:

- In the **Data Panel**, expand the **Trigger - Service Catalog** section.
- Select, hold, and drag the **Requested Item Record** pill from the **Data Panel** to the **Record** field.
- Release your mouse to “drop” the pill into the **Record** field.



Note: This will automatically populate the **Table** field with **Requested Item [sc_req_item]**.

- Verify the **Table, Approval Field and Journal Fields** are auto-filled based on the Requested Item record.

Action: Ask For Approval

* Record: Trigger -> Requested Item ...

Table: Requested Item [sc_req_item]

Approval Field: Approval

Journal Field: Approval history

6. In the Rules section, open the **Choose approval rule** dropdown.

* Rules

Approve When:

-Choose approval rule

7. Select **Anyone approves**.

8. Select the **Data Pill Picker** icon to the right of the **Anyone approves** field.

* Rules

Approve When:

Anyone approves

Note: Note: Selecting the Data Pill Picker icon will open a search box where you can dot-walk to select the **Manager of the requester** for the requested item.

9. Select **Trigger - Service Catalog**, then select **Requested Item Record**. Select the **right arrow** to navigate to the list of fields on the Requested Item Record.

trigger - Service Catalog

Trigger - Service Catalog

Requested Item Record

Run Start Time UTC Date/Time

Table Name Table Name

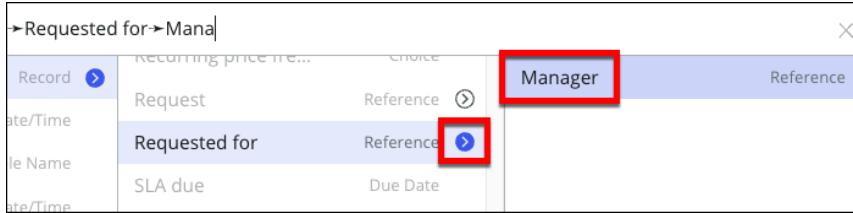
Run Start Date/Time Date/Time

10. Scroll down and locate the **Requested for** field.

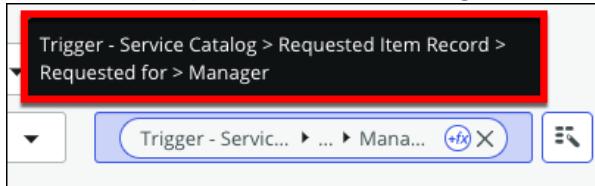
trigger - Service Catalog->Requested Item Record->Requested for->

Catalog	Requested Item Re...	Record >	Recurring price fre...	Choice
	Run Start Time UTC	Date/Time	Request	Reference
	Table Name	Table Name	Requested for	Reference >
	Run Start Date/Time	Date/Time	SLA due	Due Date
			Service	Reference

11. Select the **right arrow** icon to navigate to the list of fields on the **Requested for Record**, then select **Manager**.



12. Hover on the Trigger Pill to ensure it displays **Trigger-Service Catalog -> Requested Item Record -> Requested for -> Manager**.



13. Select **Done**.

14. Select **Save**.



E. Add a Wait For Condition

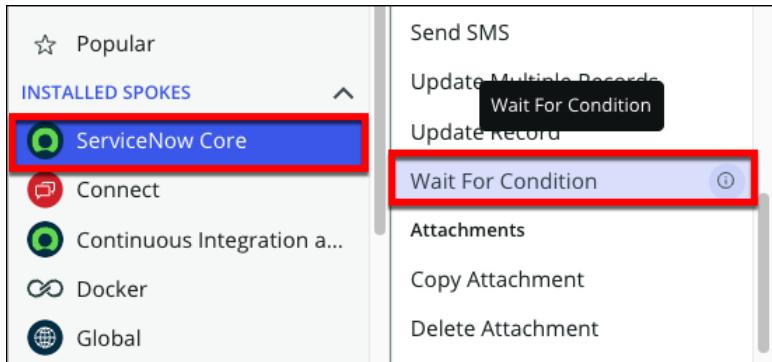
Note: Now that the approval has been requested, the next step is to wait for an approval (or rejection) from the manager. To accomplish this, we add a Wait For Condition action.

1. Select the **plus (+) icon** to the left of **Add an Action, Flow Logic, or Subflow**.

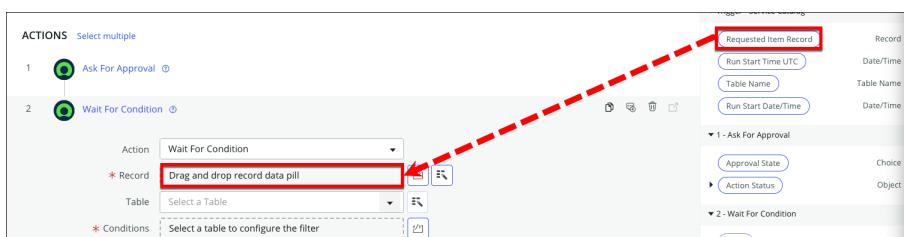
2. Select **Action**.



3. Select the **Wait for Condition** in the **ServiceNow Core** Installed Spoke.



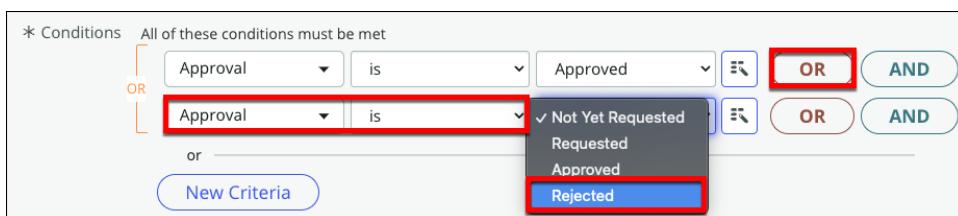
4. Drag and drop the **Trigger > Requested Item Record** to the **Record** field. This will automatically populate the **Table** field with Requested Item [sc_req_item].



5. Set the Condition to **Approval | is | Approved**.



6. Select **OR** and add the condition **Approval | is | Rejected**.

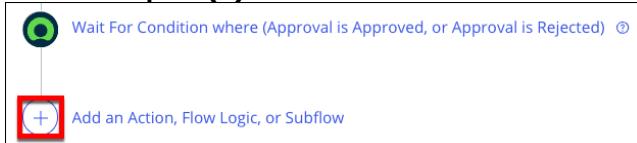


7. Select **Done**.

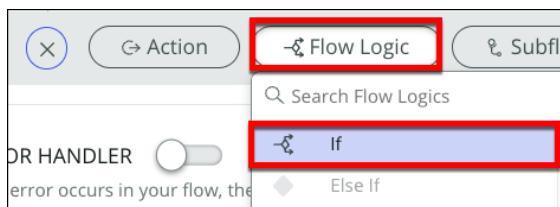
F. Add Flow Logic – If

Note: If the requested approval is Approved, the tasks for fulfilling the catalog item request can be created. If the requested approval is Rejected, an email notification can be created to inform the requester.

1. Select the **plus (+) icon** to the left of **Add an Action, Flow Logic, or Subflow**.

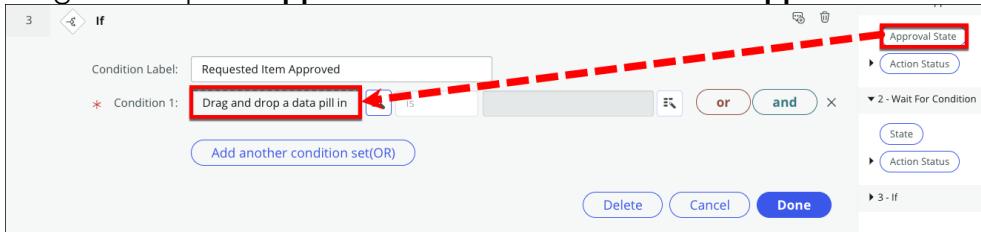


2. Select **Flow Logic**, then select **If**.

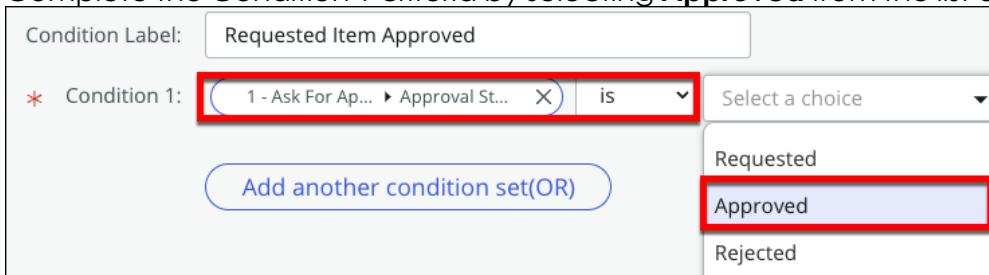


3. Type **Requested Item Approved** in the Condition Label box.

4. Drag and drop the **Approval State** field from **1 – Ask For Approvals to Condition 1**.



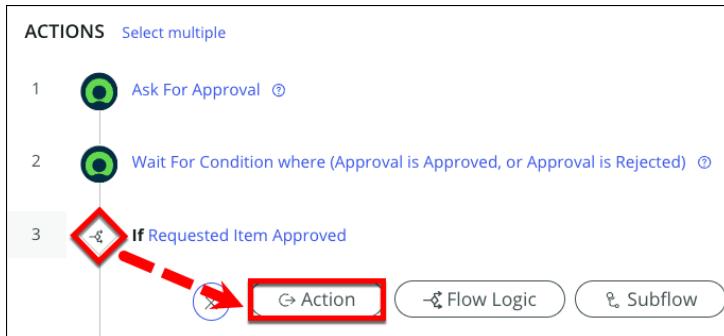
5. Complete the Condition 1 criteria by selecting **Approved** from the list of Approval states.



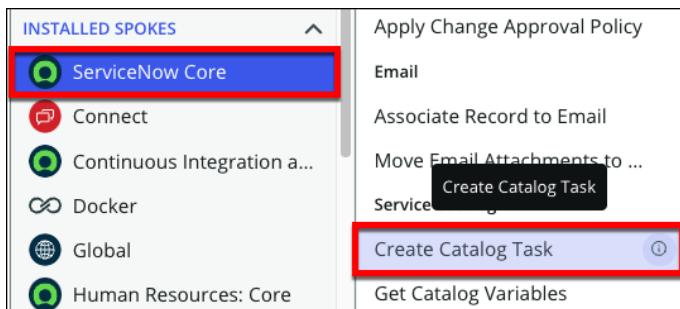
6. Select **Done**.

G. Add a Create Catalog Task Action – Order an Item

1. Ensure you are within the If Requested Item Approved step of the flow, then select **Action**.



2. Select the **Create Catalog Task** action within **ServiceNow Core > Service Catalog**.

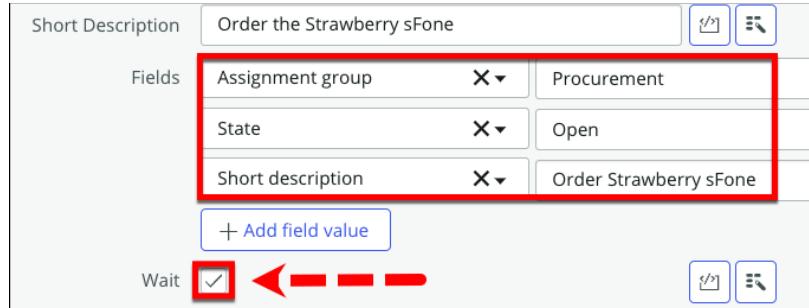


3. Drag and drop the **Requested Item Record** pill from section **Trigger – Service Catalog** to the **Requested Item [Requested Item]** field.
4. Type **Order the Strawberry sFone** in the **Short Description** field.
5. Add field values in the **Fields** section by selecting on **+Add field value**.

The diagram shows the 'Create Catalog Task' configuration screen. The 'Action' is set to 'Create Catalog Task' and the 'Table Name' is 'Catalog Task [sc_task]'. The 'Requested Item [Requested Item]' field is populated with 'Trigger ... > Requested Item ...'. The 'Short Description' is 'Order the Strawberry sFone'. The 'Fields' section contains a red box around the '+Add field value' button. The 'Wait' checkbox is checked.

6. Populate the form with the following information by selecting **+ Add field value** for each field identified below

- **Assignment Group | Procurement**
- **State | Open**
- **Short Description | Order Strawberry sFone**

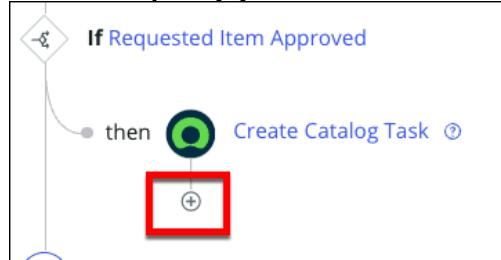


Note: Notice the **Wait** field is checked by default. This pauses the flow until the task completes and is no longer active (e.g., when the task is marked **Closed Complete**).

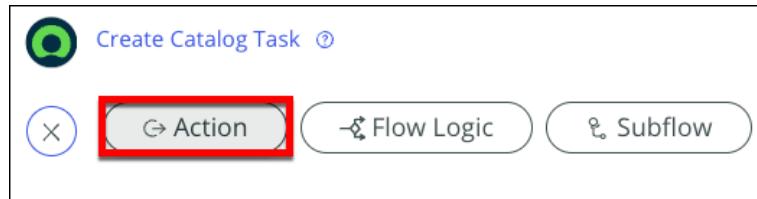
7. Select **Done**.
 8. Select **Save**.

H. Add a Create Catalog Task Action – Configure an Item

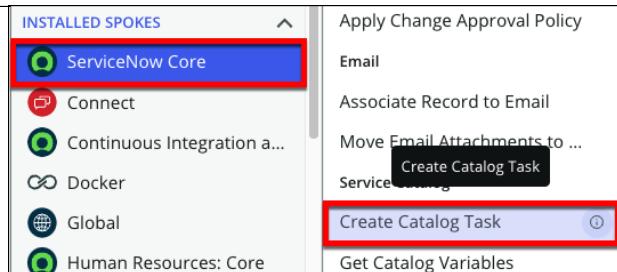
1. Select the **plus (+) icon** below the **If Requested Item Approved** step.



2. Select **Action**.



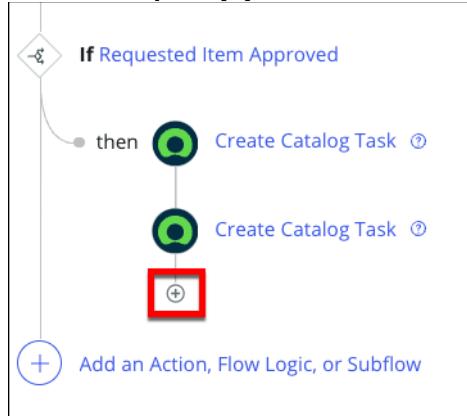
3. Select the **Create Catalog Task** action within **ServiceNow Core > Service Catalog**.



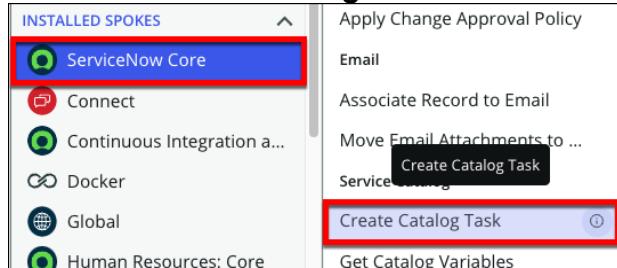
4. Drag and drop the **Requested Item Record** pill from section **Trigger – Service Catalog** to the **Requested Item [Requested Item]** field.
5. Type **Configure the Strawberry sFone** in the **Short Description** field.
6. Add field values in the **Fields** section by selecting on **+Add field value**.
7. Populate the form with the following information:
 - **Assignment Group | Software**
 - **State | Open**
 - Select **Done**
 - select **Save**.

I. Add a Create Catalog Task Action – Deliver Item

1. Select the **plus (+) icon** below the second **Create Catalog Task** action, then select **Action**.

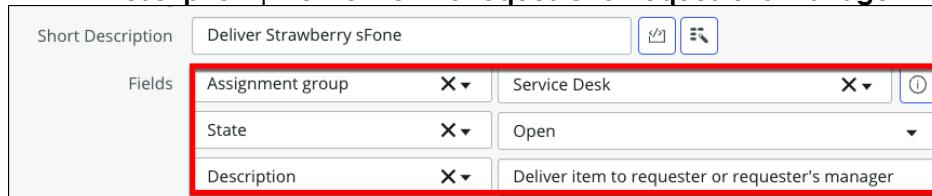


2. Select the **Create Catalog Task** action within **ServiceNow Core > Service Catalog**.



3. Drag and drop the **Requested Item Record** pill from section **Trigger – Service Catalog** to the **Requested Item [Requested Item]** field.

4. Type **Deliver Strawberry sFone** in the **Short Description** field.
5. Populate the fields with the following information by selecting **+Add field value** for each field below:
 - **Assignment Group | Service Desk**
 - **State | Open**
 - **Description | Deliver item to requester or requester's manager**

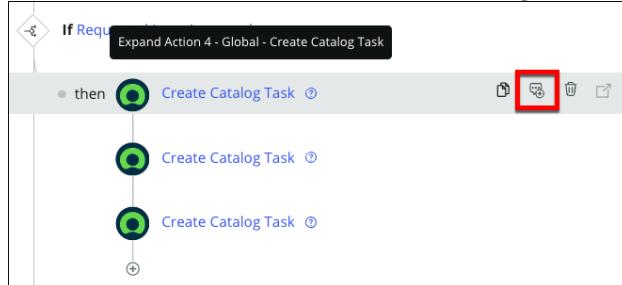


Short Description: Deliver Strawberry sFone

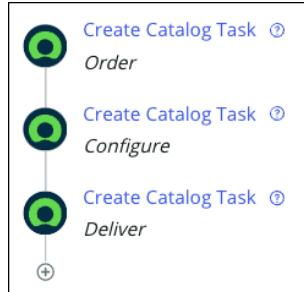
Fields:

Assignment group	X ▾	Service Desk	X ▾	(i)
State	X ▾	Open	▼	
Description	X ▾	Deliver item to requester or requester's manager		

6. Select **Done**.
7. Select **Save**.
8. Locate the Annotation icon to the right of each Task action.

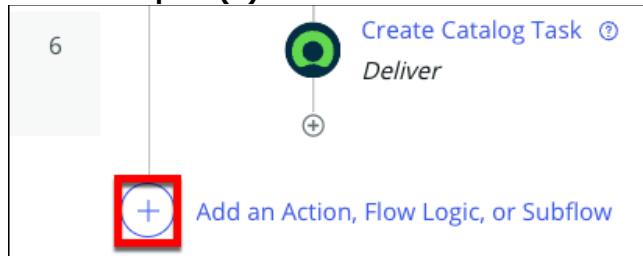


9. For each task action, **add an annotation** to make it easy to identify each task.

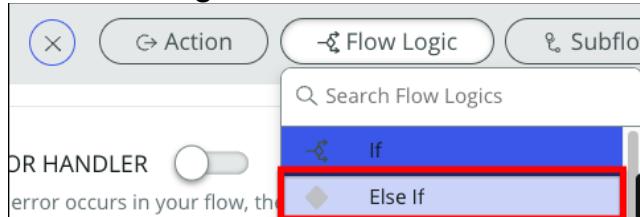


J. Add Flow Logic – Else If

1. Select the **plus (+) icon** to the left of Add an Action, Flow Logic, or Subflow.



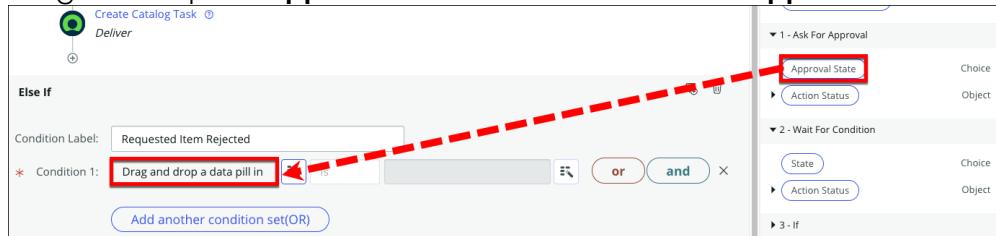
2. Select **Flow Logic** and then select **Else If**.



Note: Note: If the Else If logic choice is not available, you may need to clear your cache or use another browser window.

3. Type the following for the Condition Label: **Requested Item Rejected**.

4. Drag and drop the **Approval State** field from **1 – Ask For Approvals** to Condition 1.



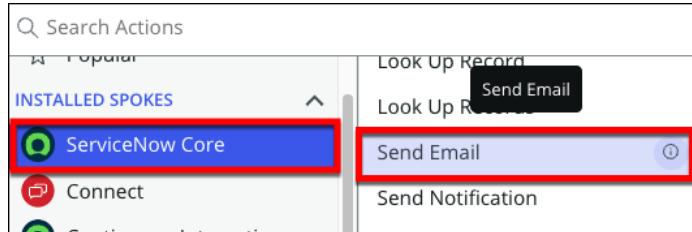
5. Select **is | Rejected** from the list of Approval states.

6. Select **Done**.

7. Select **Action** within the **Else If** logic.



8. Select **Send Email** within **ServiceNow Core > Default**.



9. Now we will populate the Send Email fields.

Note: Tip: This will require dot-walking

10. In the **To** field, select the **data pill picker**.

11. Navigate the following path:

- Trigger - Service Catalog->Requested Item Record->Requested for->Email

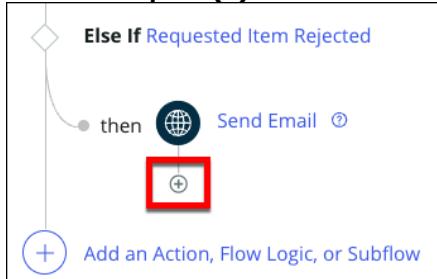
trigger - Service Catalog->Requested Item Record->Requested for->Email					
Catalog	Requested Item Re...	Record	Requested for	Reference	Email
Approval Condition	Run Start Time UTC	Date/Time	SLA due	Due Date	

12. On **Subject**, type: **Your request for a Strawberry sFone has been rejected.**

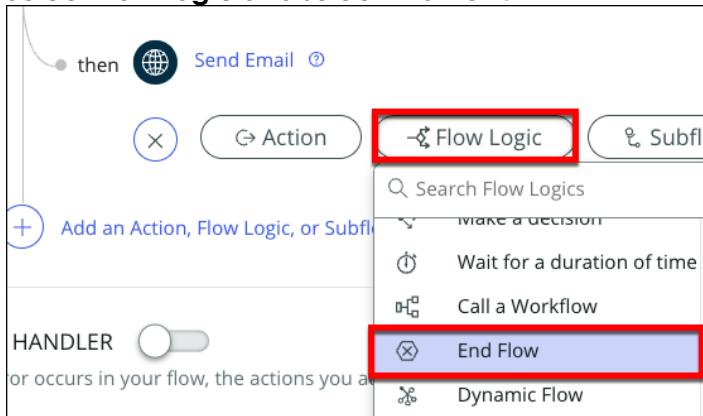
13. Select **Done**.

Note: Rather than having the Else If branch stop with the Send Email action, let's add logic to end the flow once the email has been sent.

14. Select the **plus (+) icon** below the **Send Email** action and select **Flow Logic**.

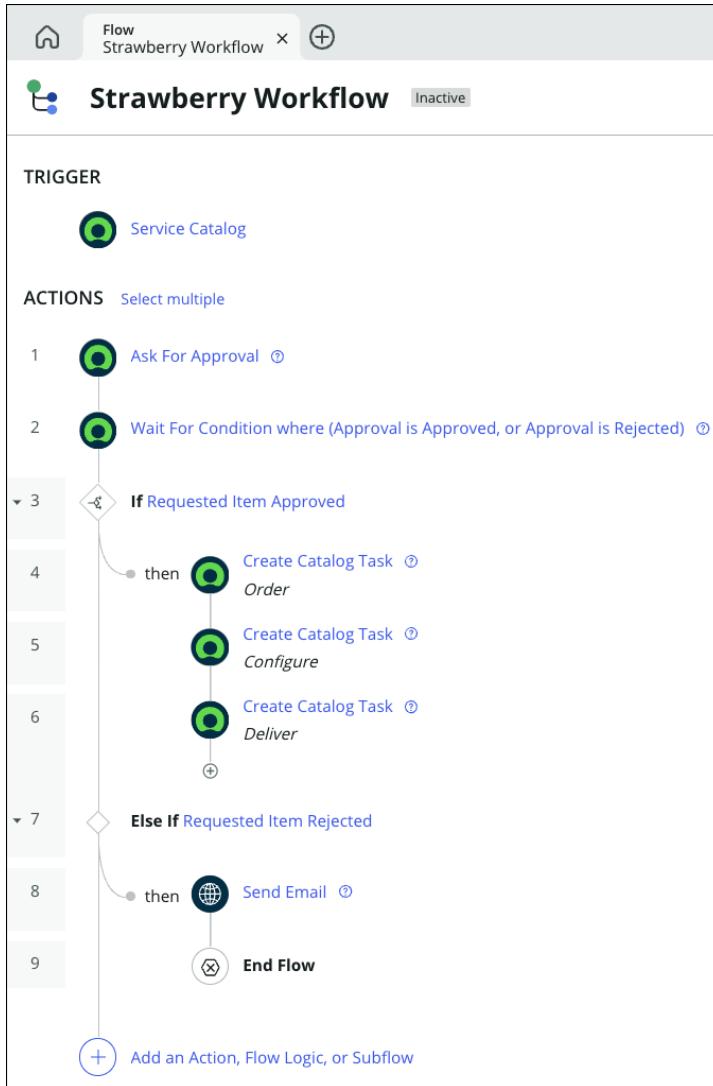


15. Select **Flow Logic** and select **End Flow**.



16. Select **Save**.

17. Verify your flow is as shown below.

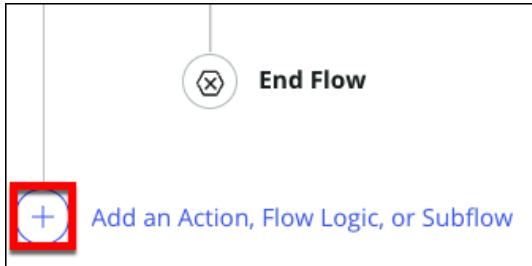


K. Create an Update Record task to Close the Requested Item Record

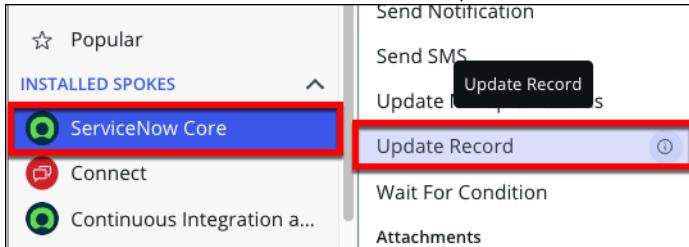
Note: Once the fulfillment tasks have been completed for the approved item, the State of the Requested Item should be updated to Closed Complete.

1. Select the **plus (+) icon** to the left of **Add an Action, Flow Logic, or Subflow**.

2. Select **Action**.



3. Under **ServiceNow Core > Default**, locate and select the **Update Record** action type.



4. Drag and drop the **Trigger > Requested Item Record** to the **Record** field. This will automatically populate the **Table** field with Requested Item [sc_req_item].



5. Select **+Add Field Value** and set **State** to **Closed Complete**.

6. Select **Done**, then select **Save**.

L. Activate and associate flow to Service Catalog Item

1. Select the **Activate** button.

Note: A message will appear confirming you would like to activate the flow – select **Activate**.

2. Return to the main ServiceNow window and navigate to **All > Service Catalog > Catalog Definitions > Maintain Items**.
3. Locate and open the **Strawberry sFone** item record.
4. Scroll down and select the **Process Engine** tab.

5. Type and select **Strawberry Workflow** in the **Flow** field.

6. Select **Update** to save the Strawberry item record and return to your previous screen.

LAB VERIFICATION

A. Test the Flow – Order a Strawberry sFone

Testing Scenario: To test the Flow, impersonate David Loo and order the sFone. Then impersonate David's manager to approve the request.

1. Navigate to System Properties by typing **sys_properties.list** in the Filter Navigator.
2. Locate the **com.snc.process_flow.reporting.level** and ensure the record is saved with the **ON** value. You can do this by opening the record and typing the value ON, or you can edit directly inline by double-clicking in the field.

Note: This is required to view the Flow execution at the end of the lab verification and troubleshoot if necessary

System Properties				
All > Name contains com.snc.process_flow.reporting.level				
Name	Value	Type	Application	Description
*com.snc.process_flow.reporting.level	ON	choice list	Global	Level of reporting data generated by the...

3. Impersonate **David Loo**.



4. Navigate to **All > Self-Service > Service Catalog**.
5. Select the **Mobiles** category.
6. Locate and open the **Strawberry sFone** item.
7. Confirm the title, description, and picture are displayed.
8. Select **Order Now**.

The screenshot shows the 'Strawberry sFone' item page in the Service Catalog. It includes a product image, a brief description, and a purchase form on the right.

Strawberry sFone

The new Strawberry sFone. Better than all previous mobile phone formats, folding into a Super-cool S Shape. Get on board with the shape of the future with the new Strawberry sFone!

Order this Item

Price	\$399.00
Quantity	1
Subtotal	\$399.00
Delivery time	0 Days

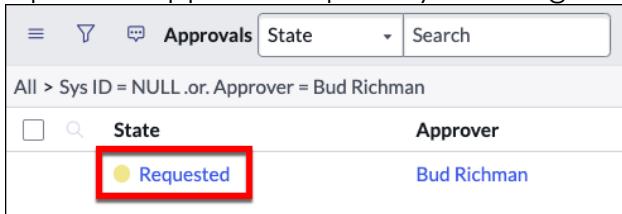
Order Now (highlighted in red)

Add to Cart

Shopping Cart
Empty

Note: Tip: You should see a confirmation message that your request has been submitted.

9. **Impersonate Bud Richman** (David's manager).
10. **Close** the Workspace Tour (or explore it if you would like).
11. Navigate to **All > Service Desk > My Approvals**.
12. Open the approval request by selecting the **Requested** link.



All > Sys ID = NULL .or. Approver = Bud Richman

State	Approver
Requested	Bud Richman

13. Select **Approve**.



Approval
Requested Item: RITM0010002

Approver	Bud Richman
State	Requested

Approving Requested Item: RITM0010002

Update Approve Reject Delete

14. **End impersonation**.

B. Complete the Tasks to Fulfill the Request

Note: As the System Administrator, you will test the flow logic by completing the catalog tasks rather than impersonating users in the fulfillment groups.

1. Navigate to **All > Service Catalog > Open Records > Tasks**.
2. Open the task with the short description, **Order the Strawberry sFone** (you may add Work notes).
3. Select **Close Task**.
4. From the List Controls Menu, select **Refresh List** (or refresh your browser).
5. Open the task with the short description, **Configure the Strawberry sFone** (you may add Work notes).
6. Select **Close Task**.
7. Refresh the list (If the next task does not appear, refresh the list again).
8. Open the task with the short description, **Deliver Strawberry sFone** (you may add Work notes).
9. Select **Close Task**.

C. Review Flow Execution

1. Navigate to **All > Process Automation > Workflow Studio**.
2. Locate, then select the **Strawberry Workflow**.
3. Open the **Strawberry Workflow** execution.



4. Open the **Strawberry Workflow** and review the status of the workflow (**Completed**) and the State of each step. Is it what you expected? If not, troubleshoot and work through the Lab Validation steps again.

EXECUTION DETAILS			
Show Action Details		State	Start time
FLOW STATISTICS			
TRIGGER	Run as: System	Completed	2023-09-08 18:00:22
Catalog Item Requested	Open Flow Logs	Completed	1634ms
ACTIONS			
1 Ask For Approval	Core Action	Completed	2023-09-08 18:00:22
2 Wait For Condition	Core Action	Completed	2023-09-08 18:02:32
3 If Requested Item Approved	Flow Logic	Evaluated - True	2023-09-08 18:02:32
4 Create Catalog Task Order	Core Action	Completed	185ms
5 Create Catalog Task Configure	Core Action	Completed	90ms
6 Create Catalog Task Deliver	Core Action	Completed	169ms
7 Else If Requested Item Rejected	Flow Logic	Evaluated - False	0ms
8 Send Email	Core Action	Not Run	0ms
9 End	Flow Logic	Not Run	0ms
10 Update Record	Core Action	Completed	131ms
ERROR HANDLER			