

# ServiceNow Application Developer

## Workflow > Exercise: Create the NeedIt Approval Workflow

In this exercise, you will create a workflow for the *NeedIt* application. The workflow will have three activities:

- Request Manager Approval
- Set State Value on Reject
- Set State Value on Approval

### Preparation

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1. Open a *NeedIt* record to examine the *State* field choice list values.
  - a. In the main ServiceNow browser window (not Studio), use the Application Navigator to open **NeedIt > Open**.
  - b. Open a record from the list of *NeedIt* records.
  - c. Examine the *State* field. What is the current value?
  - d. Click the *State* field choice list and examine the choices.

### Create the NeedIt Approval Workflow

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1. If the *NeedIt* application is not open in Studio from the last exercise, open it now.
  - a. In the main ServiceNow browser window use the Application Navigator to open **System Applications > Studio**.
  - b. In the *Select Application* dialog, click the **NeedIt** application.

2. Create a workflow.

- a. In Studio, click the **Create Application File** link.
- b. In the *Filter...* field enter the text **Workflow** OR select **Workflow** from the categories in the left hand pane.
- c. Select **Workflow** in the middle pane as the file type then click the **Create** button.

3. Configure the workflow:

*Name:* **NeedIt Approval**

*Table:* **NeedIt [x\_<your\_company\_code>\_needit\_needit]**

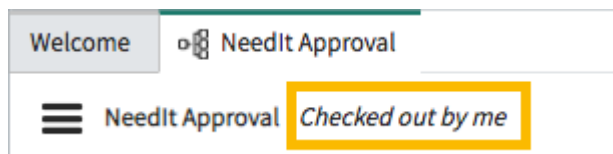
*Description:* **Request approval from Requested for's manager and set state value on reject or approve.**

*If condition matches:* **Run the workflow always**

*Condition:* **[State] [is] [Awaiting Approval]**

4. Click the **Submit** button.

5. Examine the canvas header. Notice the new workflow is automatically checked out to you.

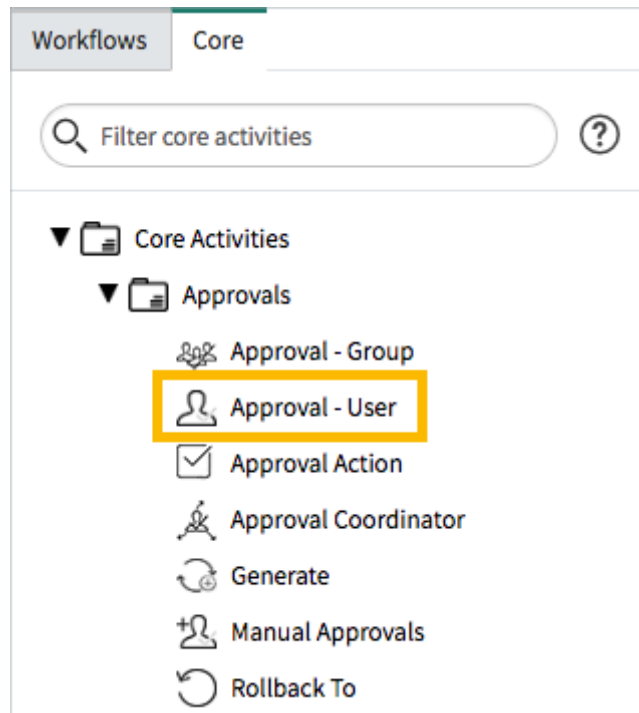


## Add an Approval – User Activity

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1. Switch to the **Core** tab in the Palette.

2. Expand the **Approvals** category.
3. Locate the **Approval - User** activity.



4. Click, hold, and drag the **Approval - User** activity into the canvas. Hover the activity over the transition between the *Begin* and *End* activities. When the transition turns blue, drop the activity.

5. Configure the workflow:


*Name:* **Request Manager Approval**

6. Add the *Requested for's* manager as the approver.

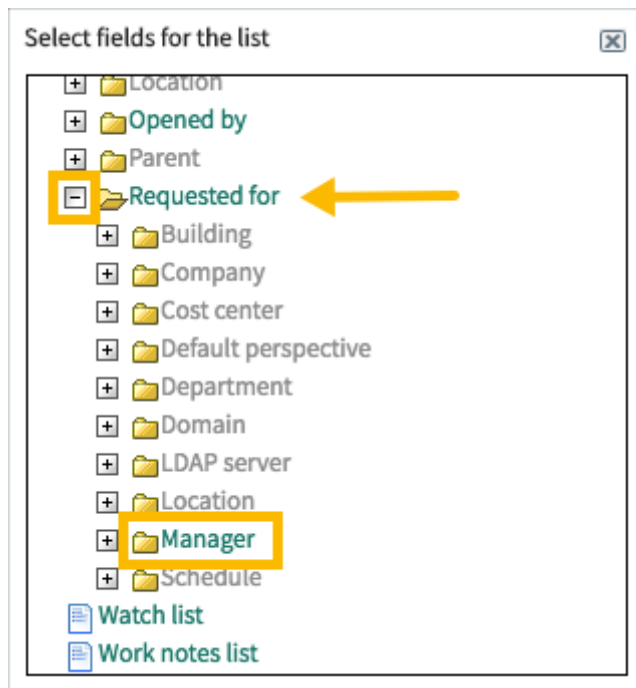
a. Scroll to the *Approvers* section.

b. Click the **Unlock Users** button (  ) for the *Users* field.

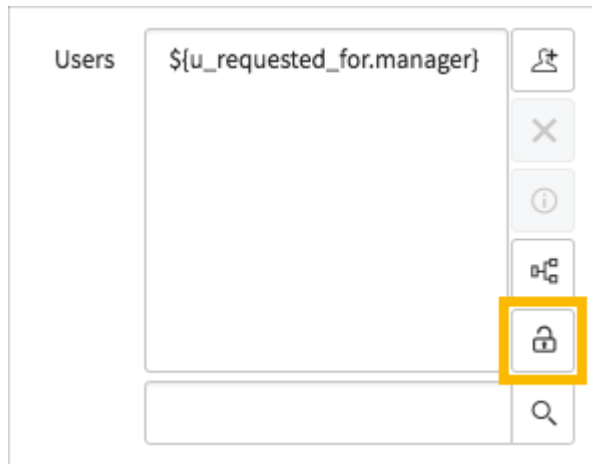
c. Click the **Select fields** button (  ).

d. Click the **Expand** button (  ) for the *Requested for* field in the *Select fields for the list* dialog.

e. Click the **Manager** field for the *Requested for*.



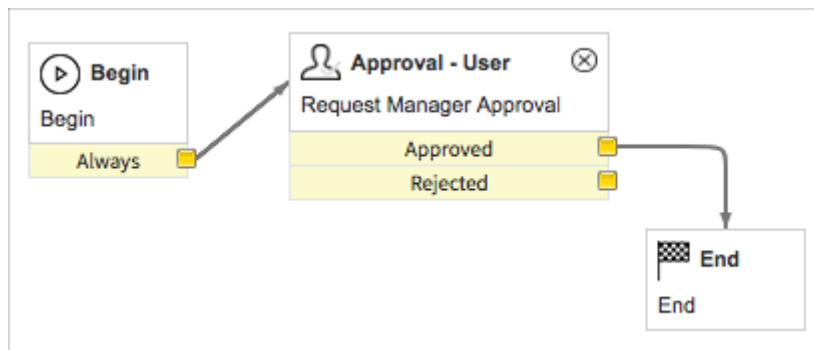
f. Click the **Lock Users** button to collapse the *Users* field.



7. Set the *Wait for* field value to **Anyone to Approve**. There is only one approver so *Everyone to approve* or *First response from anyone* would also work.

8. Click the **Submit** button.

9. Examine the Workflow. Verify there is a transition from the *Begin* activity to the *Approval - User* and another from the *Approval - User* activity to the *End* activity. There should be arrowheads at the end of each transition. The *Approval - User* activity should connect to the *End* activity through the *Approved* node.



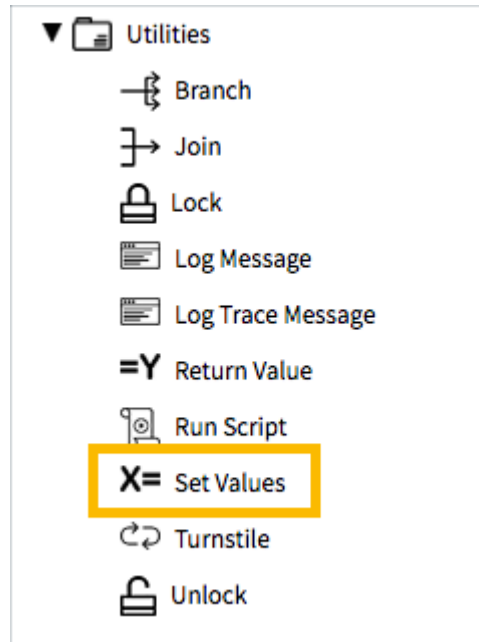
► **QUESTION:** What does the syntax *u\_requested\_for.manager* mean in the *Users* field?

## Add a Set Values Activity to the Approved Transition

1. Switch to the **Core** tab in the Palette.

2. Expand the **Utilities** category.

3. Locate the **Set Values** activity.



4. Click, hold, and drag the **Set Values** activity into the canvas. Hover the activity over the transition between the *Approval - User* activity *Approved* node and the *End* activity. When the transition turns blue, drop the *Set Values* activity.

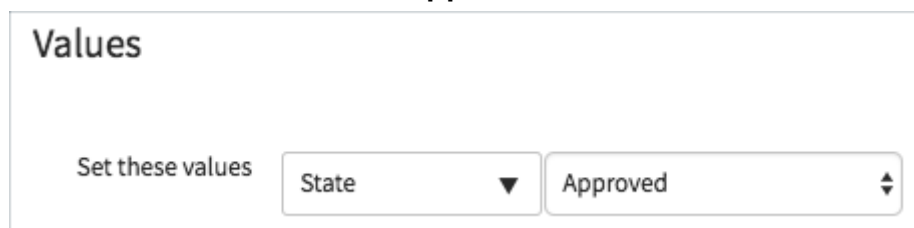
5. Configure the *Set Values* activity:

*Name:* **Set State to Approved**

6. Set the *State* field value.

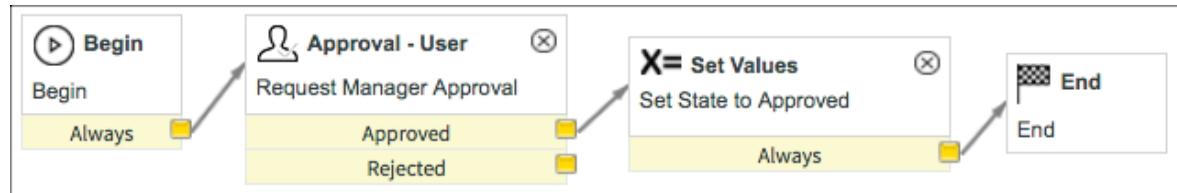
a. Scroll to the **Values** section.

b. Set the **State** field value to **Approved**.

A screenshot of a software interface showing a form titled 'Values'. Below the title, there is a section labeled 'Set these values'. Under this section, there are two dropdown menus. The first dropdown menu is labeled 'State' and has a downward arrow. The second dropdown menu is labeled 'Approved' and has a double-headed arrow.

7. Click the **Submit** button.

8. Examine the Workflow. Verify there is a transition from the *Approval - User* activity *Approved* node and the *Set Values* activity. There should also be a transition from the *Set Values* activity to the *End* activity. Your workflow layout on the canvas might be different from the layout in the image. As long as the transitions correctly connect the activities, the layout does not matter.




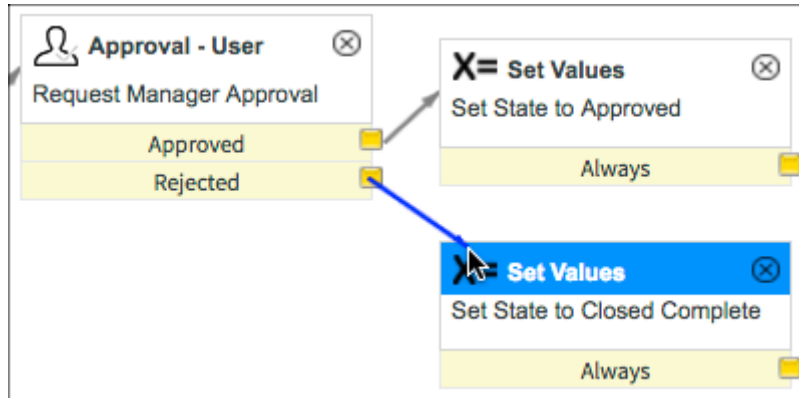
## Add a Set Values Activity for Rejected

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1. Switch to the **Core** tab in the Palette.
2. If collapsed, expand the **Utilities** category.
3. Locate the **Set Values** activity.
4. Since there is no *Rejected* transition to drag the *Set Values* activity to, double-click the *Set Values* activity.
5. Configure the *Set Values* activity:  
*Name:* **Set State to Closed Complete**
6. Set the *State* field value.
  - a. Scroll to the **Values** section.
  - b. Set the *State* field value to **Closed Complete**.
7. Click the **Submit** button.
8. Locate the new *Set Values* activity on the canvas. It is most likely in the upper left side of the canvas. Drag it to a new location on the canvas so it does not overlap with other activities.

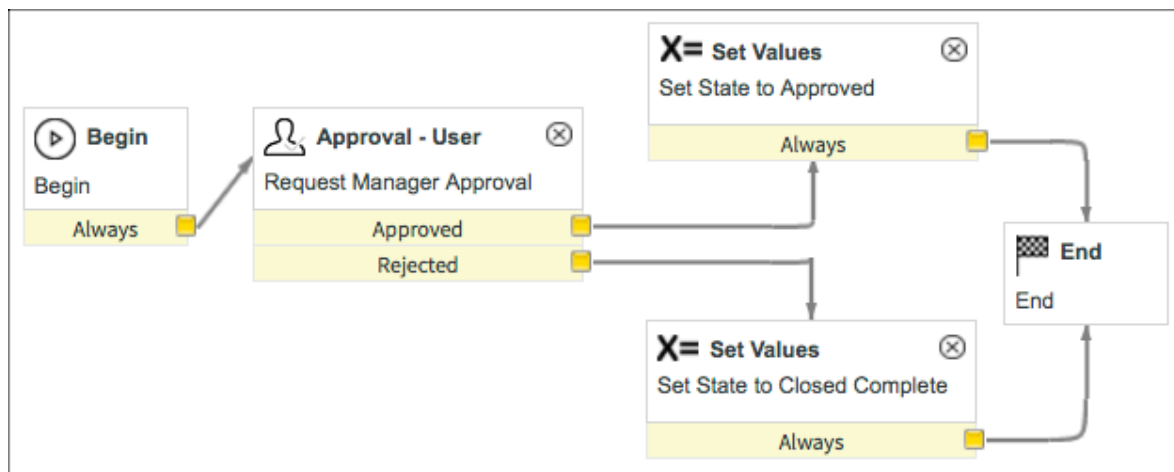
9. Add transitions to the new *Set Values* activity to connect it to the workflow.

- a. Click on the **Rejected** node (  ) of the *Approval - User* activity and drag to the new **Set Values** activity. When the *Set Values* activity turns blue, release the mouse.



- b. Click on the **Always** node of the *Set Values* activity and drag to the **End** activity. When the *End* activity turns blue, release the mouse.

10. Examine the Workflow. Verify the transitions are correct. Your workflow layout on the canvas might be different from the layout in the image. As long as the transitions correctly connect the activities, the layout does not matter.



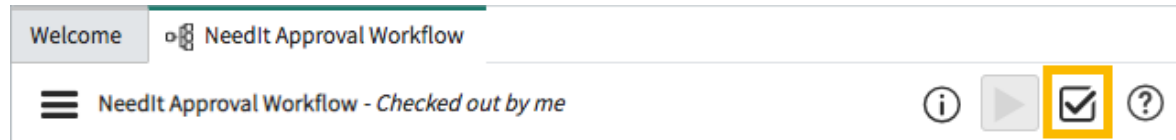
You are probably eager to test the workflow. You test the workflow in the next Exercise after you learn about contexts and debugging.

► **QUESTION:** Why were there no instructions to save the workflow?



## Validate the Workflow

1. To validate the workflow, click the **Validate** button (  ) in the canvas header.



2. Examine the Workflow Validation Report. There should be no Warn or Critical level messages. If you have Warn or Critical messages, use the report to determine the issue. Make any necessary corrections.

Workflow Validation Report
<p>Workflow Validation Report for Workflow "NeedIt Approval"</p> <p>Validate Summary - Valid Workflow - Total checks performed:16 (Info:16, Warn:0, Critical:0)</p>