

ServiceNow Application Developer

Workflow > Exercise: Test and Publish the NeedIt Approval Workflow

In this exercise, you will test and publish the *NeedIt Approval* Workflow.


Preparation

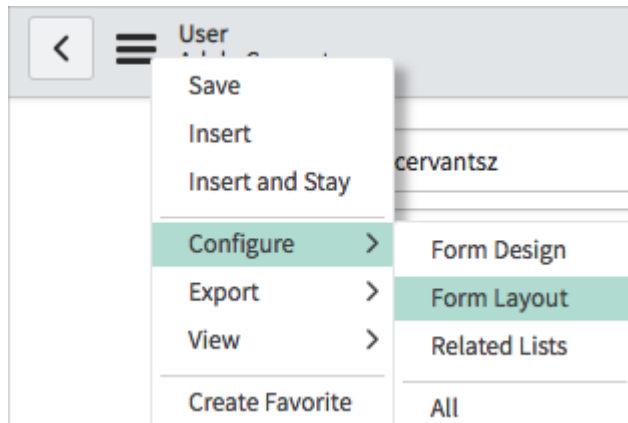
The *Approval - User* activity requires the *Requested for's* manager to approve or reject *NeedIt* requests. You need to add a manager to a user record for testing purposes. The *User* form is part of the *Global* scope.

IMPORTANT: If no approvers are found for workflow approval activities, the activity defaults to approved.


1. In the main ServiceNow browser window (not Studio), use the Application Navigator to open **User Administration > Users**.
2. Open the record for **Adela Cervantsz**.

<div><div><div></div></div><div>Users</div><div>New</div><div>Search</div><div>Name</div><div></div><div>Search</div></div>				
<div><div><div></div></div><div>All</div></div>				
<div><div><div></div></div><div><div></div><div>User ID</div></div><div><div></div><div>Name</div></div><div><div></div><div>Email</div></div></div>				
<div><div></div></div>	<div><div></div></div>	<div><div></div><div>abel.tuter</div></div>	<div><div></div><div>Abel Tuter</div></div>	<div><div></div><div>abel.tuter@example.com</div></div>
<div><div></div></div>	<div><div></div></div>	<div><div></div><div>abraham.lincoln</div></div>	<div><div></div><div>Abraham Lincoln</div></div>	<div><div></div><div>abraham.lincoln@example.com</div></div>
<div><div></div></div>	<div><div></div></div>	<div><div></div><div>adela.cervantsz</div></div>	<div><div></div><div>Adela Cervantsz</div></div>	<div><div></div><div>adela.cervantsz@example.com</div></div>

3. Click the **Additional actions** menu () and select the **Configure > Form Layout** menu item.




4. In the message about scope, click the ***Edit this section in Global*** link. This option changes the scope to *Global* temporarily. When you leave the form, the scope returns to *NeedIt*.

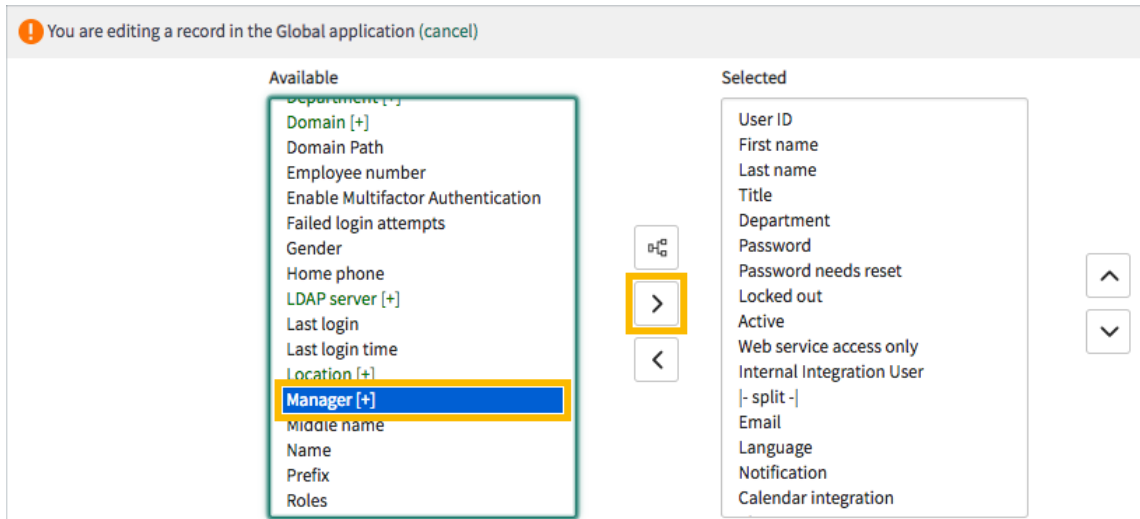
 The 'User' section is in the **Global** application, but **NeedIt** is the current application. To edit this form:

- [Edit this section in Global](#)
- [Create a section in NeedIt](#)
- [Create a view in NeedIt](#)

5. Add the *Manager* field to the *User* form.



a. Click the **Manager** field in the *Available* slushbucket to select it.

b. Click the **Add** button () to move the *Manager* field to the *Selected* slushbucket.



You are editing a record in the Global application (cancel)

Available		Selected
Department [+]		User ID
Domain [+]		First name
Domain Path		Last name
Employee number		Title
Enable Multifactor Authentication		Department
Failed login attempts		Password
Gender		Password needs reset
Home phone		Locked out
LDAP server [+]		Active
Last login		Web service access only
Last login time		Internal Integration User
Location [+]		- split -
Manager [+]		Email
Middle name		Language
Name		Notification
Prefix		Calendar integration
Roles		

c. Use the **Move up** () and **Move down** () buttons to place the *Manager* field on the form at the location of your choice.

d. Click the **Save** button.

6. Make Adela's manager **Fred Luddy**.



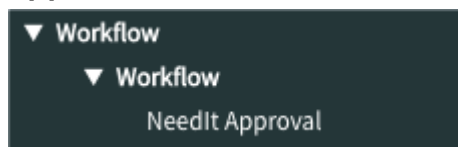
Manager Fred Luddy

7. Click the **Update** button.

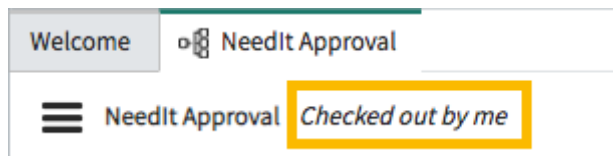
Test the NeedIt Approval Workflow - Approve



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. If not still open from the last Exercise, open the *NeedIt Approval* workflow for editing in Studio.

- a. In Studio, use the Application Explorer to open **Workflow > Workflow > NeedIt Approval**.



- b. Verify the workflow is checked out to you.



- c. If the workflow is *not* checked out to you, click the **Workflow Actions** menu () and select the **Checkout** menu item.
3. Look up the condition that causes the *NeedIt Approval* workflow to execute.
 - a. Click the **Workflow Properties** button () in the canvas header.
 - b. Open the **Conditions** section (tab).
 - c. Note the *Condition*.
 - d. Close the *Workflow Properties* dialog.

4. Create a *NeedIt* request.
 - a. In the main ServiceNow browser window (not Studio), open **NeedIt > Create New**.
 - b. Configure the new *NeedIt* request.
 - i. Set the *Requested for* to **Adela Cervantsz**.
 - ii. Set the *State* field value to **Awaiting Approval**.
 - iii. For all other fields, use the value of your choice.
 - c. Click the **Submit** button.
5. Use the Application Navigator to open **Workflow > Live Workflows > Active Contexts**.
6. Click the Started **timestamp** for the *NeedIt Approval* workflow context.

Workflow contexts

Search

Started

Search

All > Active = true

Started

Workflow version

Related record

State

2018-12-07 07:22:30

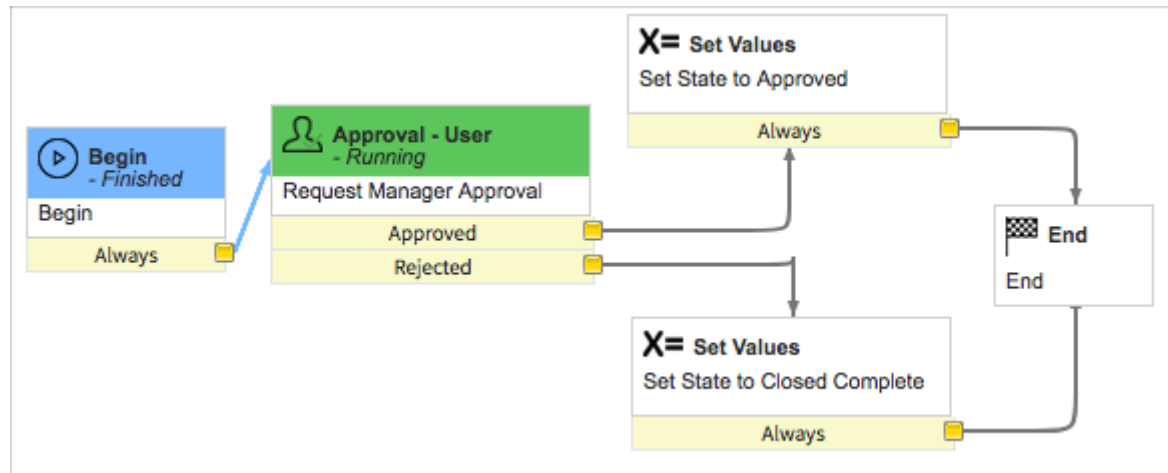
NeedIt Approval

NeedIt: NI002005

● Executing

7. Examine the *Related record* field. This field contains the record number of the record for which the workflow is executing.
8. In the *Workflow Executing Activities* related list (tab), note which activity is currently executing. The workflow should be stopped on the *Request Manager Approval* activity.

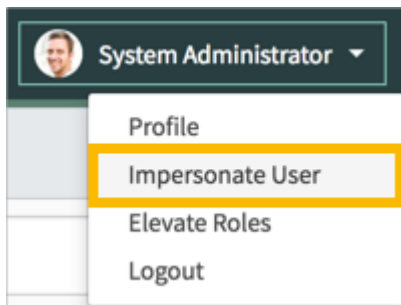
9. In the Related Links, click the **Show Workflow** link. The context workflow should look like the screenshot. Keep this context workflow tab open so you can come back to it as you continue testing.



10. Impersonate Adela's manager and approve the *Need/It* request.

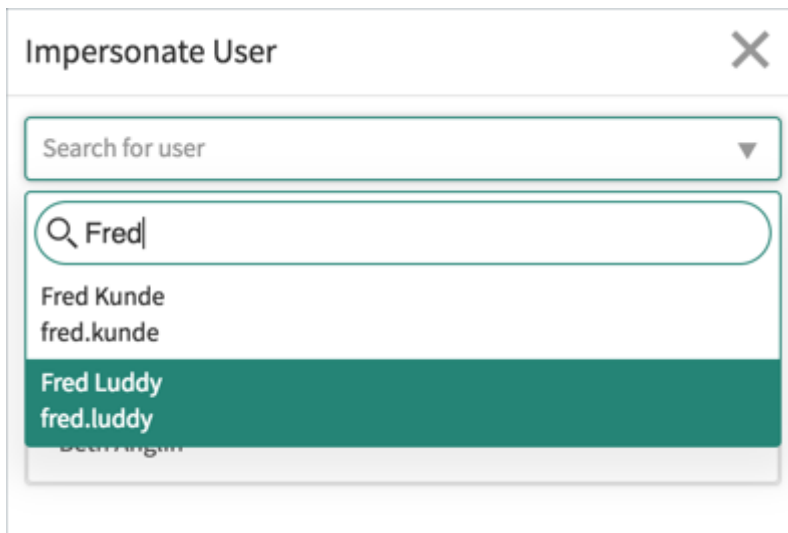
a. Impersonate **Fred Luddy**.

- i. In the main ServiceNow browser window, open the **User menu** by clicking your user name in the ServiceNow banner. Select the **Impersonate User** menu item.



- ii. In the *Search for user* field, type **Fred**.

- iii. In the drop-down list, click **fred.luddy**.



- iv. Examine the *User menu* in the ServiceNow banner. You should now be *Fred Luddy*.



b. Approve the *NeedIt* request.


i. Use the Application Navigator to open **Service Desk > My Approvals**.

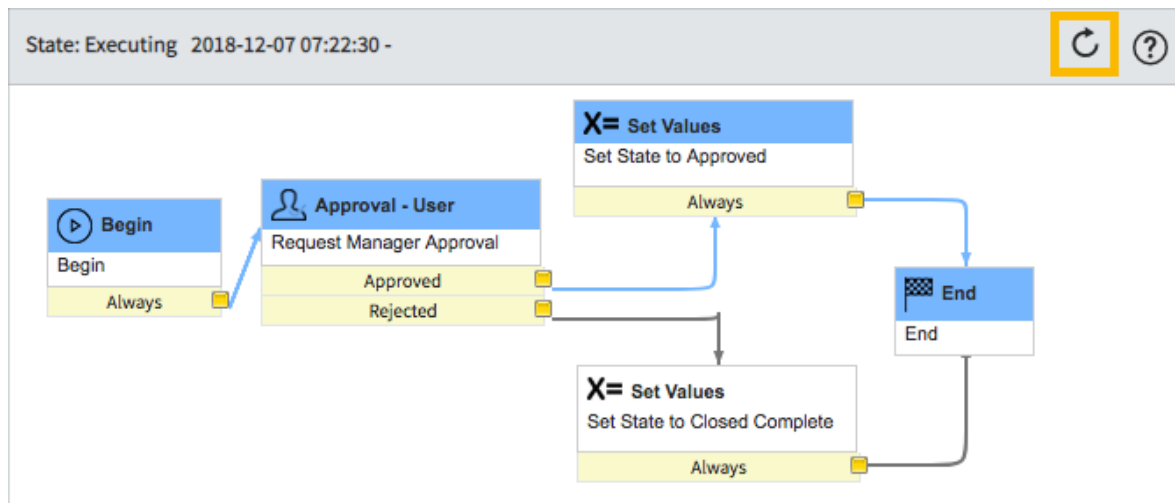
ii. Locate the *Approval* for the **NeedIt** record with the *State* field value of **Requested**.

iii. Right-click on the **Requested** link and select the **Approve** menu item.
OR

iv. Click the **Requested** link to open the record then click the **Approve** button.

11. Impersonate the **System Administrator** user.

12. Switch to the tab displaying the Workflow context diagram. Click the **Refresh** button () to update the diagram. The workflow should be complete and should have followed the *Approved* transition.



13. Use the Application Navigator to open **NeedIt > Open**.

14. Open the record you used to test the workflow. Verify the *State* value is *Approved*.

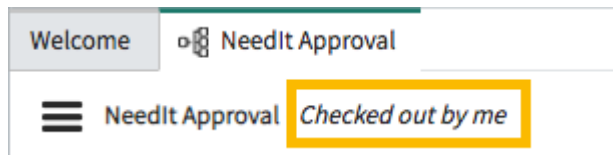
Test the NeedIt Approval Workflow - Reject


Using the *Test the NeedIt Approval Workflow - Approve* steps as a model, test the workflow's rejected path.

Publish the NeedIt Approval Workflow

The *NeedIt Approval* workflow is fully tested and functioning as expected. Publish the workflow so it executes for all users and not just the user who checked out the workflow.

1. Return to the browser window that contains the checked out *NeedIt Approval* workflow.



2. Open the Workflow Actions menu () and click the **Publish** menu item.
3. When publication is complete, the status is updated.

