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Transforming Government Service Management with Industry Workflows

Customer and Industry Workflows
Fed Forum 2025 Lab Guide

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Introduction

Lab Goals

In this lab you will learn why Playbooks are a very effective method to work through simple to complex workflows, why customers need and want this, how you can tweak an existing playbook and even build an entirely new playbook from scratch.

What is a playbook? In sports, a playbook is a collection of strategies, play diagrams, and step-by-step processes that guide a sports team. It helps ensure that the team is prepared to perform at their best.

What's in a sports playbook?

- **Strategies**: The playbook outlines the team's strategy for winning the game
- **Play diagrams**: The playbook includes diagrams of the plays the team will use
- **Roles and responsibilities**: The playbook defines who is responsible for what
- **Metrics**: The playbook defines how the team will measure performance and set goals
- **Winning plays**: The playbook documents plays that have led to positive outcomes in the past

Why is a playbook important?

- A playbook helps the team focus and perform at their best
- A playbook helps the team maintain consistency and quality
- A playbook helps the team understand how to improve continuously

Simply put, in the business world playbooks have the same function. In ServiceNow, playbooks provide a visualization layer to guide workers to

Playbooks essentially are your processes visualized. They allow workers to interact throughout the lifecycle of any simple or complex cross functional process, blending automation and human intelligence. If following the sports analogy, playbooks ensure our workers understand their role and responsibility as the playbook is executed, it leverages the automation and human intelligence to ensure your organization as operating at its best to deliver consistent, quality interactions to its customers. Finally this playbook allows everyone to follow the same process regardless of knowledge level or tenure.

During this lab, you will work through the following exercises:

- Lab 1 – Extend an existing Playbook – 30 minutes
- Lab 2 – Configure a Playbook from Scratch - 60 minutes
- Lab 3 (Bonus/Advanced)– Use of additional Activities in Playbooks

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Before You Begin

1. If you haven't already, reserve your lab instance.
2. If you've already reserved your instance, be sure it's awake.

Lab 1 – Extend an existing Playbook

Background / Purpose

In this first lab you will edit and extend an existing playbook. There are already many available playbooks that you can leverage instead of creating a new one. The playbook that you will use for this exercise is a playbook regarding **Information Requests** (ie: FOIA) with several stages and steps. The aim is to introduce you to playbook authoring experience. By modifying existing activities or adding a new activity to a ready-to-use process.

Important note: While you will be modifying an existing playbook in this lab, it is not considered best practice. This is done for lab purposes only. Best practice is to duplicate the playbook, which creates an exact copy of it for you to modify. Then deactivate the out of the box playbook. This ensures that the original remains untouched in the event it is ever updated by product in a later release.

This lab will include the following exercises:

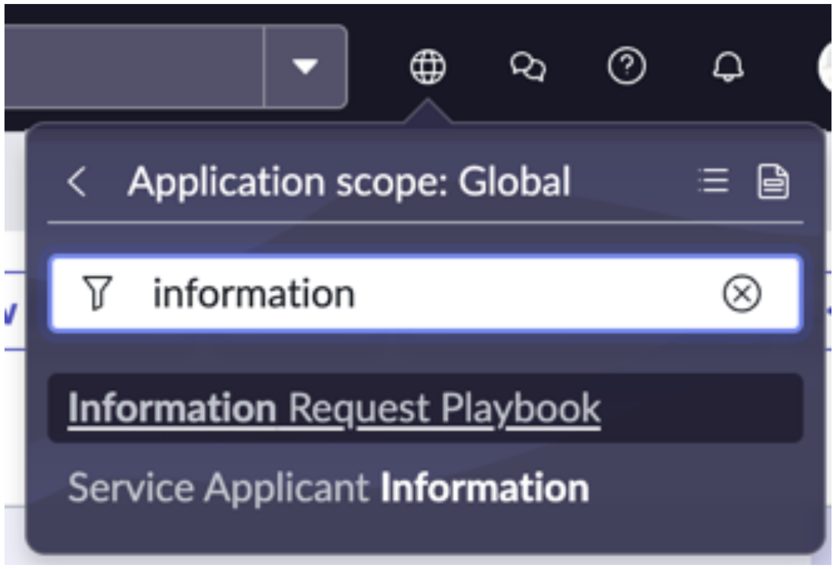
- Add a new activity step into an existing Playbook.
- Modify an existing Playbook Activity.

Lab 1, Exercise 1: Modify an existing Playbook Activity

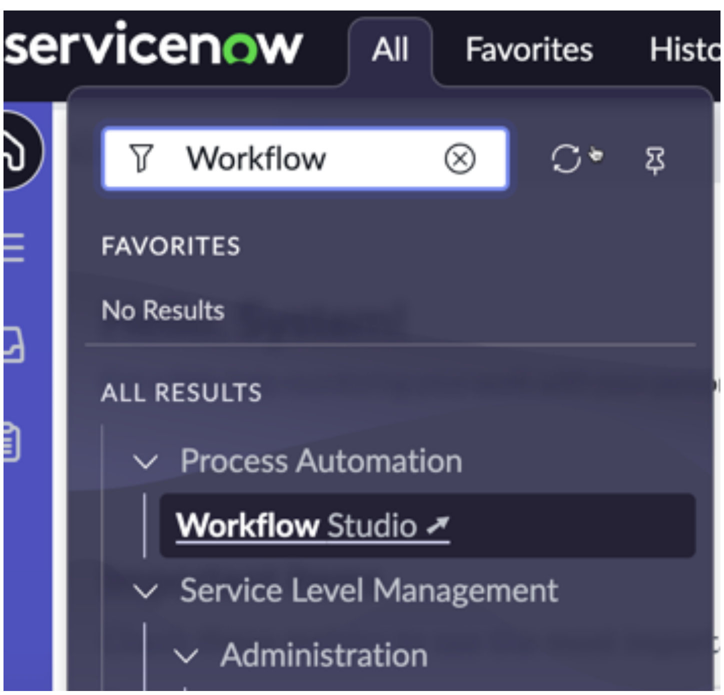
In this first exercise, you will use **Workflow Studio** to work with an existing playbook. Workflow Studio is the unified design experience for workflow automation, combining access to playbooks, decision tables, flows, actions, data streams, as well as integrations. You will work add an "**Information**" activity. This activity provides process guidance at specific parts of the process that may not yet be automated.

Out of the box, there are a few different default activities. Each type of activity can have a specific runtime experience. You won't have time to cover everything in this lab. You'll look at how to change the default view used in this "Record" activity.

1. Select the **map** icon (application scope) and select "**Information Request Playbook**" scope.

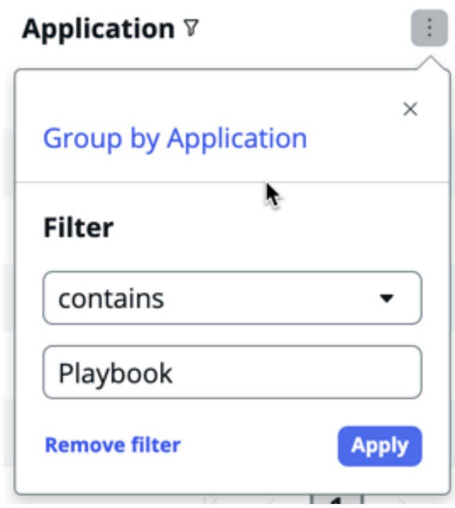


2. Navigate to **Process Automation > Workflow Studio** or use the Filter Navigator and search for **Workflow.**

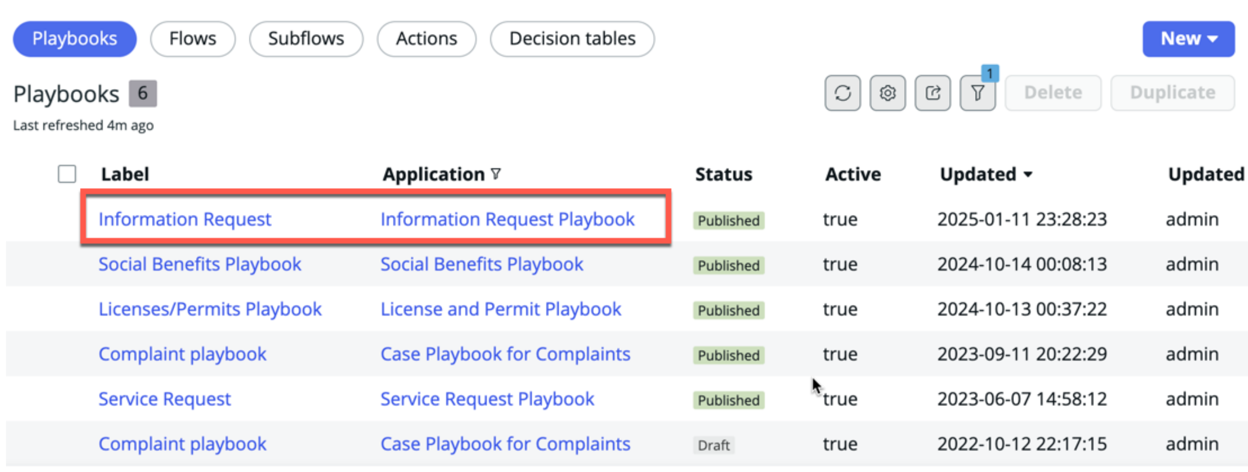


3. On the "Playbooks" tab, click the elipsis button to the right of the **Application** column. In the filter box, type "**Playbook**" and click "**Apply**". This list now reflects the out of the box playbooks currently installed. For this lab, you will work with the **Information Request**

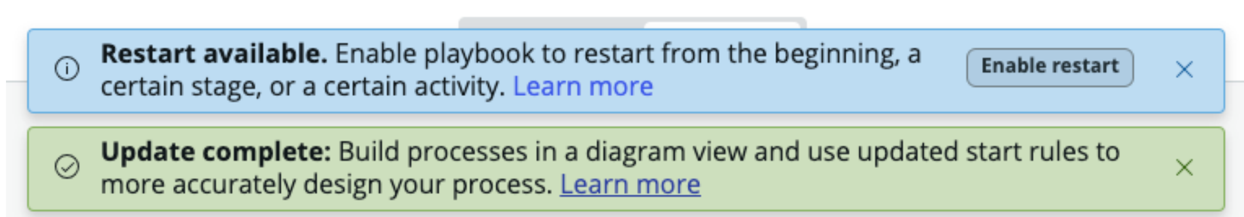
playbook but feel free to open one of the others to see the process.



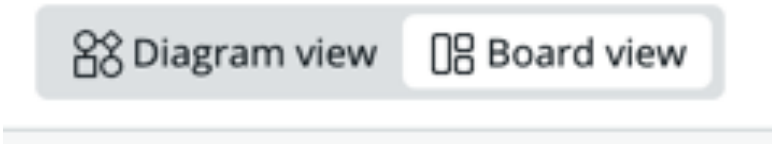
4. Open the **Information Request** playbook which should be listed.



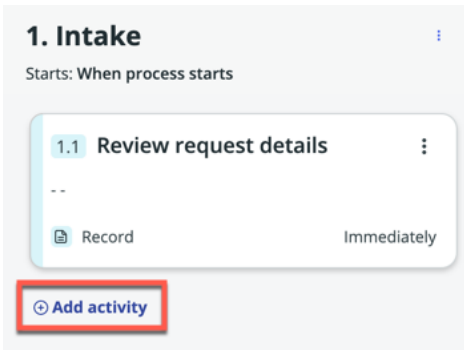
5. If you receive a messages regarding enabling restart or upgrade complete, you may close these windows.



6. Also ensure you are in "**Board view**". Worfklow studio supports two designer views but you will stay in Board view today.

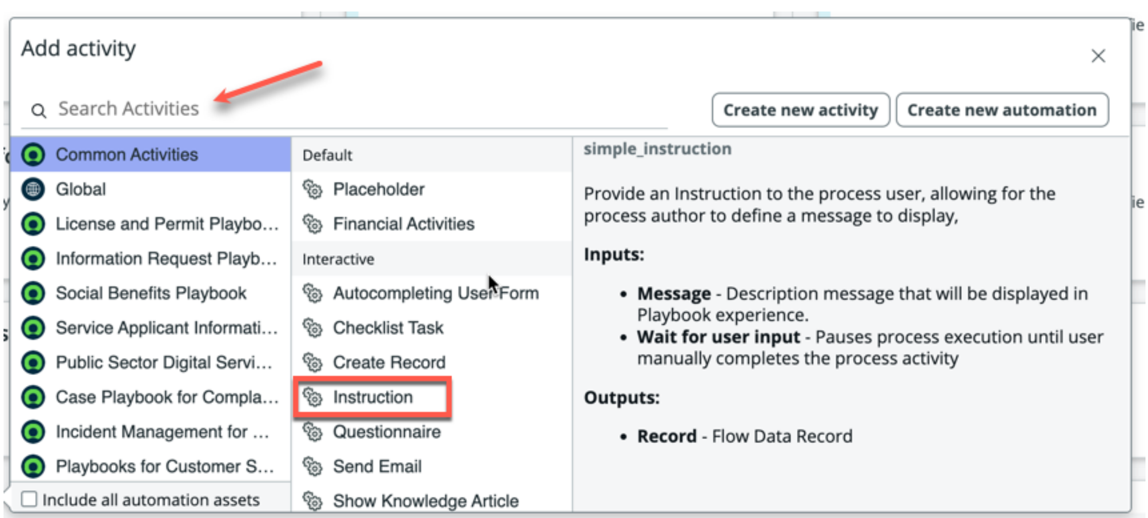


7. Under the "**1. Intake**" lane, click "**Add activity**" at the bottom. You will have to scroll down.

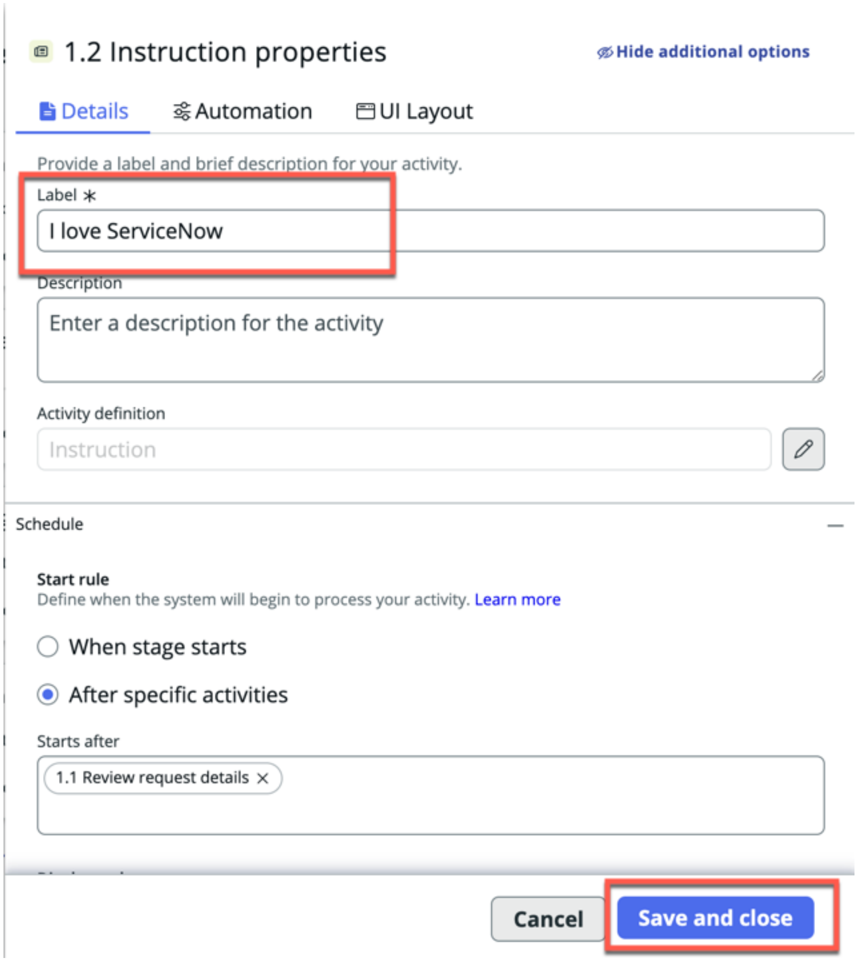


8. In the left hand column, you'll find many out of the box activities. Many come with the platform, which would be listed under Common Activities and Global. You will also find many activities that come with installed playbooks.

   Under "**Common Activities**", select "**Instruction**". The Instruction activity is used to provide additional instructions to agents/fulfillers where a process isn't automated.



9. The **Instruction** activity is added to the canvas and the properies page displays. Rename the activity by modifying the Label property. Enter "**I love ServiceNow**", or whatever you like.



10. Then click "**Save and Close**". The Instruction step should already be the last step of the lane and should look like the image below. That said, dragging and dropping allows you to place the activity anywhere on the canvas you like.

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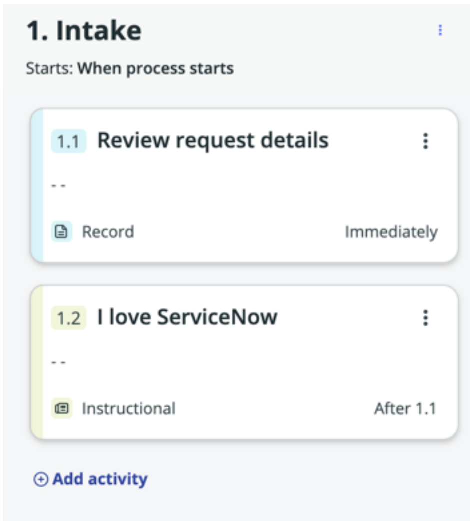
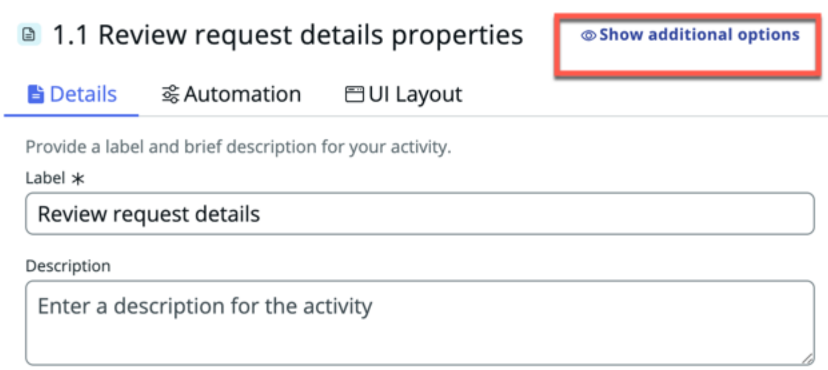


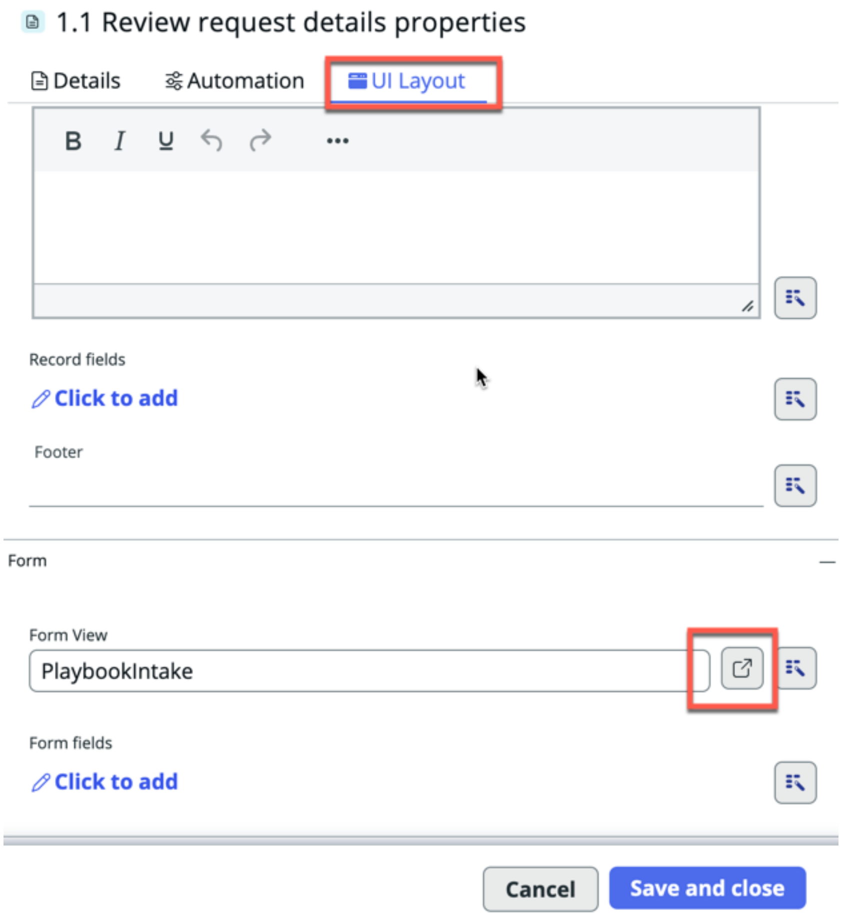
Lab 1, Exercise 2: Configure the Form view of an existing Activity

You have received a new requirement where a due date is required for all new Information Requests. In this next exercise, you be modifying the form view in the first activity of the Intake stage. Here you will see Form Builder is integrated into Workflow Studio, allowing for a consolidated design experience.

1. Next, you will modify an existing activity to add new data fields to collect. In the **Intake** stage, click the "**Review request details**" activity. Then click "**Show additional options**".



2. On the UI Layout tab, scroll down to the "Form view" section, then click the button to the right of the selected form.



3. **Form Builder** will open allowing you to design the form for the Intake stage. If you are not already in the "Information Request Playbook" scope, click "Edit in original scope".

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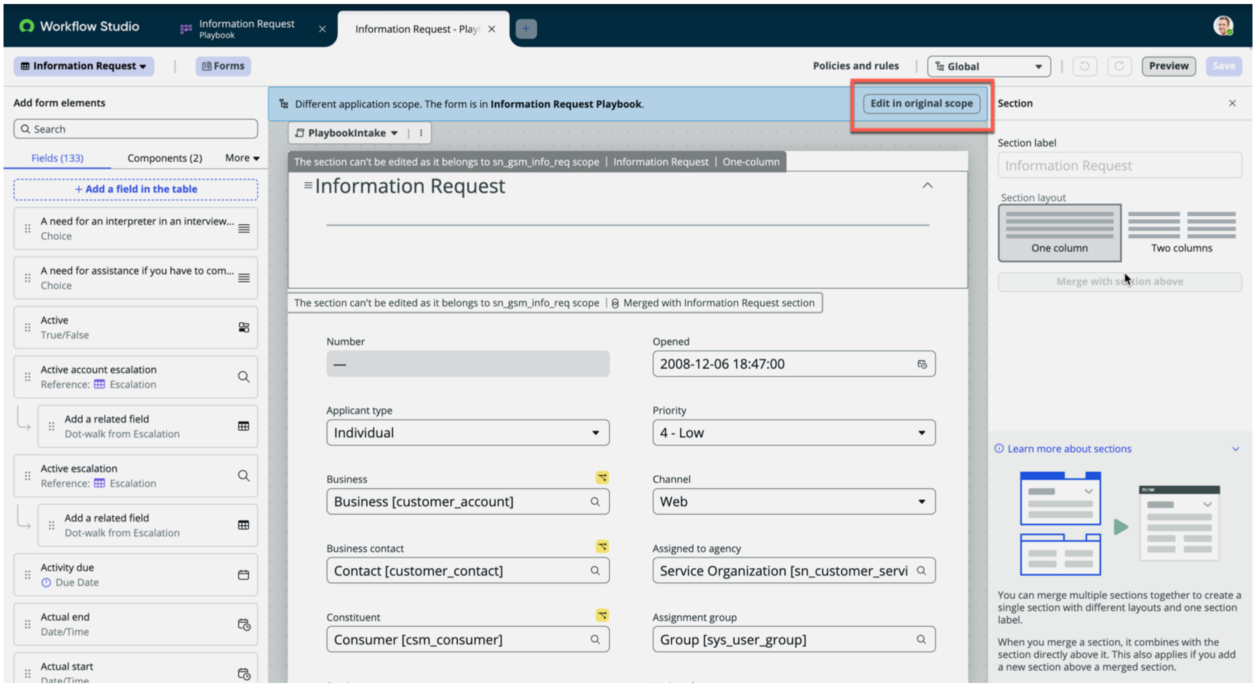
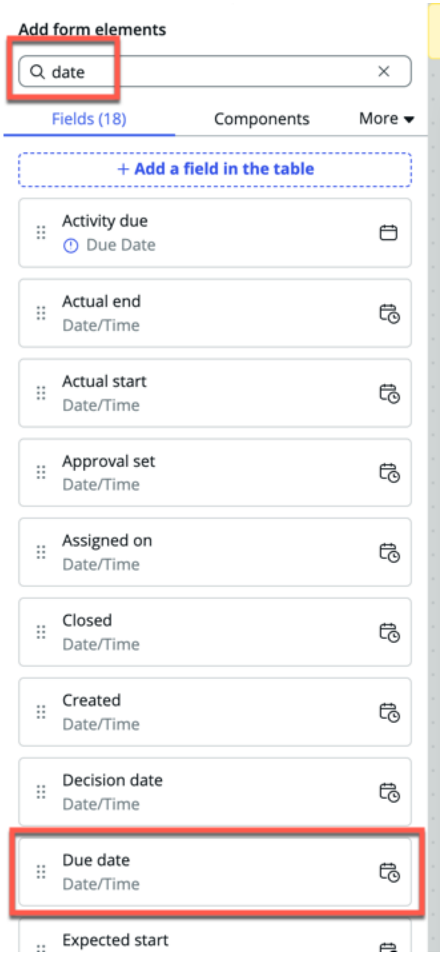
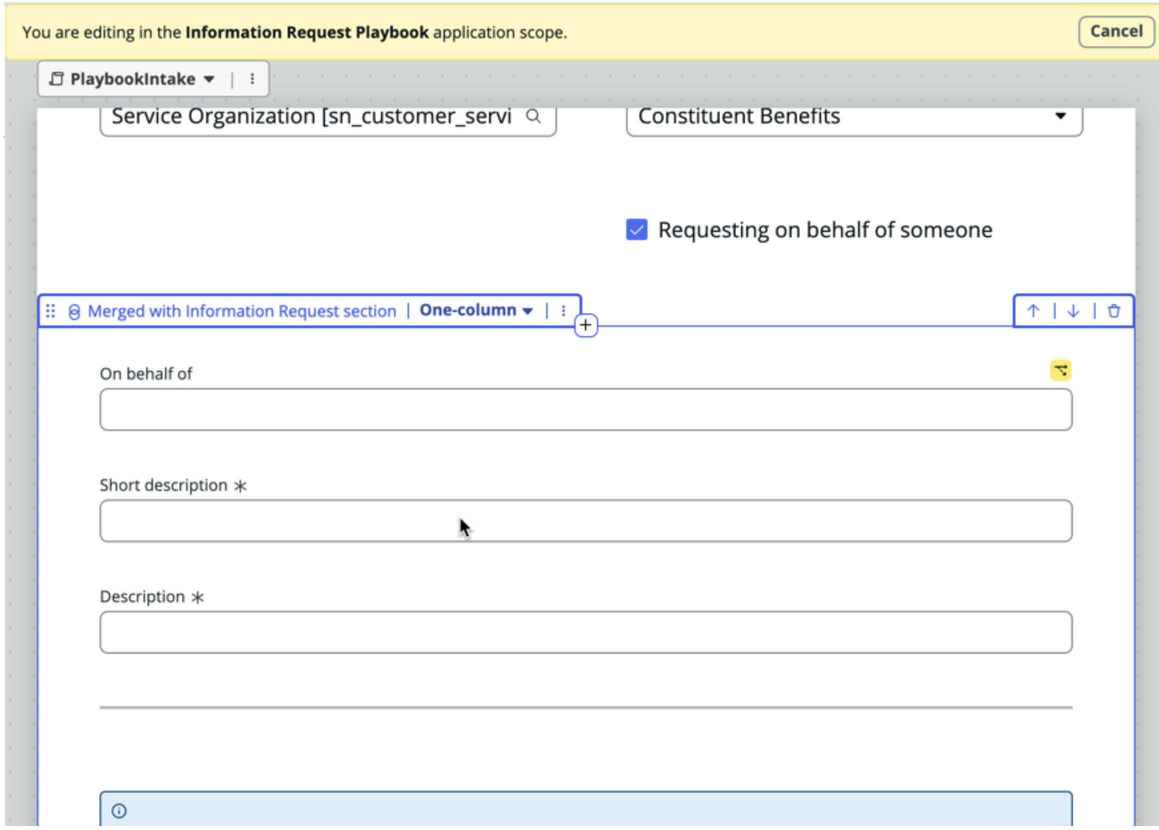


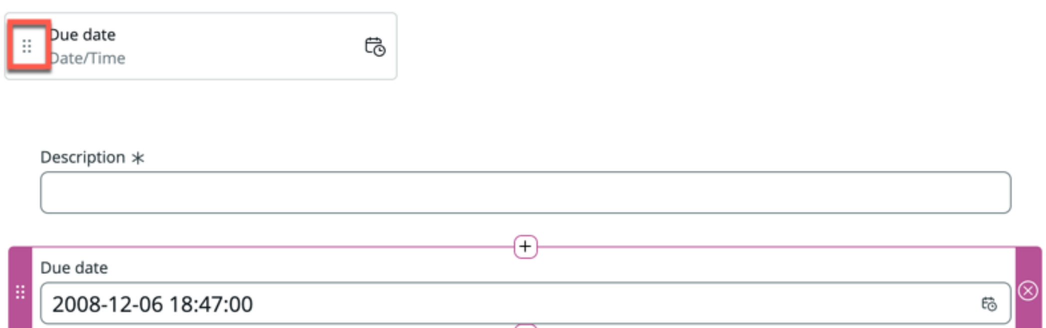
4. There are many out of the box data elements that can be leveraged. Here you will add “**Due date**” under “**Description**” so you will know when the requestor needs this information. In the “**Add form elements**” panel, search for “**date**”.



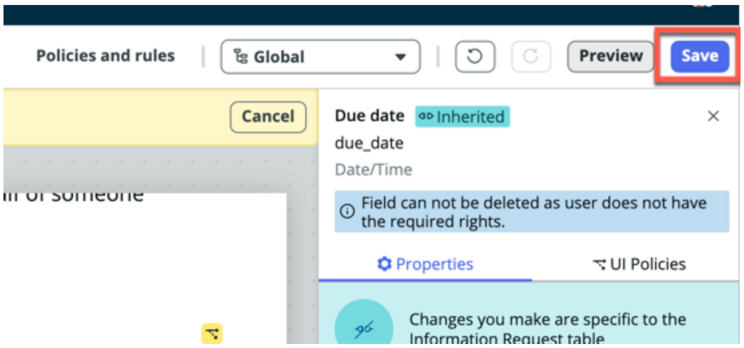
5. In the center form pane, scroll down until you see "Description".



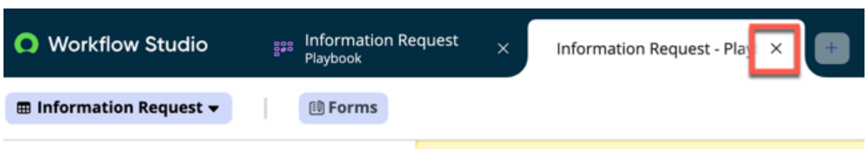
6. Use the left vertical hamburger menu on the “**Due date**” field, and drag and drop it under “**Description**”. You can also reposition the field if you prefer it in a different location.



7. Click “**Save**” in the top right of Form Builder.



8. You can now close the **Form Builder** tab.



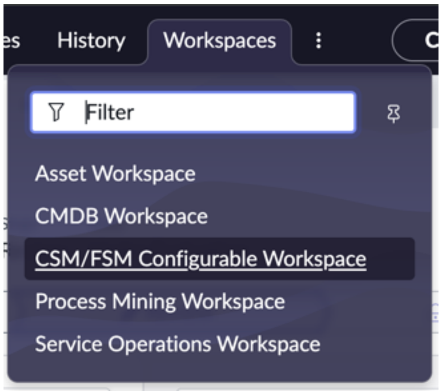
9. You should now be back on the **Information Request Playbook**. If the "**1.1 Review request details properties**" pane is open, click "**Save and close**".

10. Click "**Activate**" in the top right.

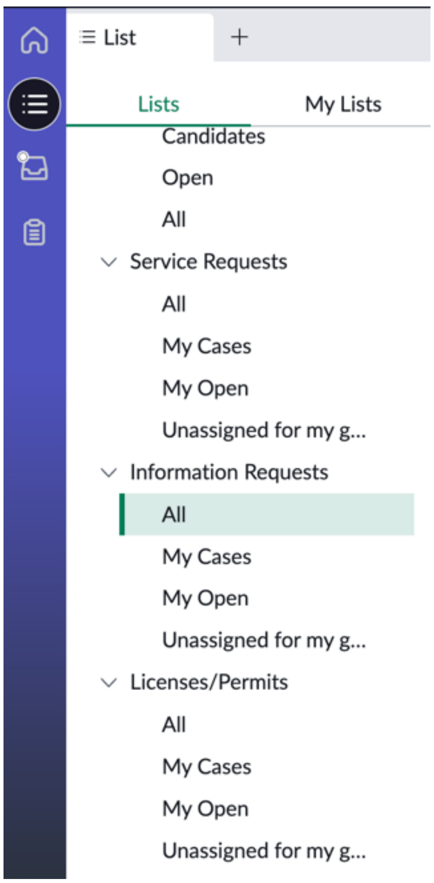
Lab 1, Exercise 3: Test your changes

Congratulations, you have modified your first activity record view. To confirm that you successfully edited your playbook, please follow those steps:

1. Under "**Workspaces**", chose "**CSM/FSM Configurable Workspace**".



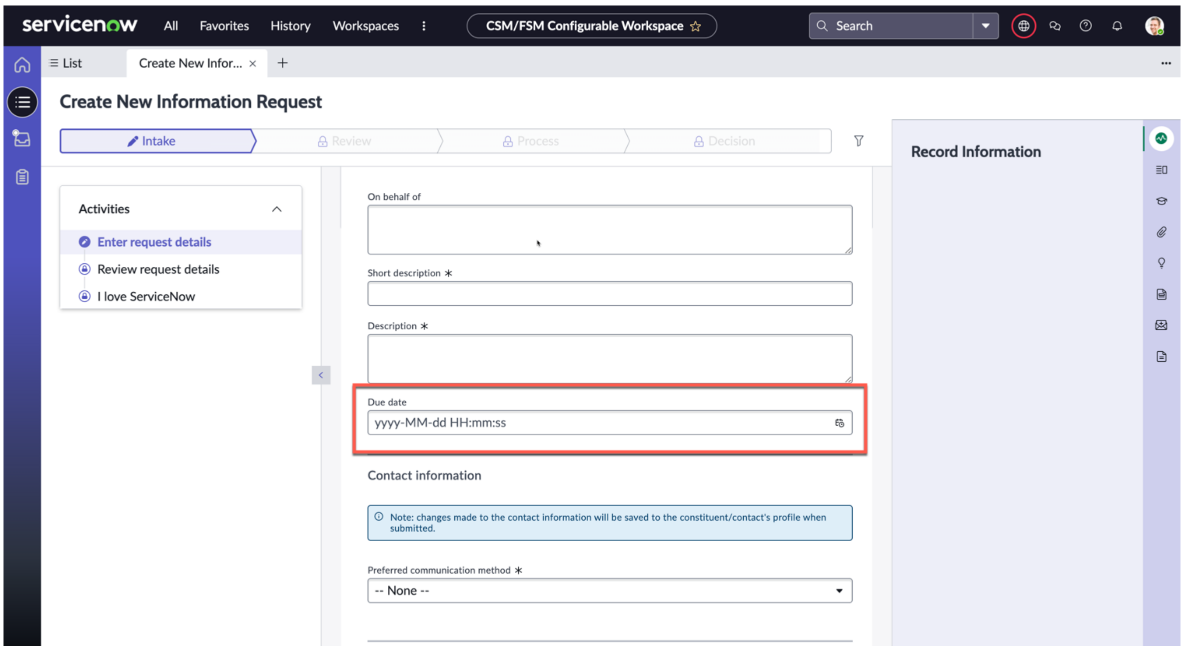
2. Click the "**List**" icon in the left vertical navigation bar. Then scroll to "**Information Request**" and click "**All**".



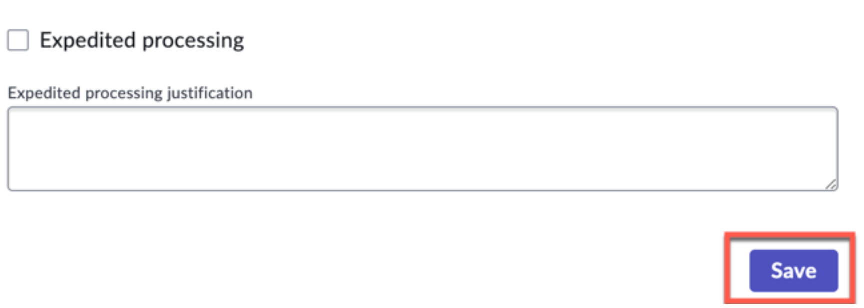
3. In the list header, click "**New**".

4. The new Information Request case begins. The first step is to collect information. Notice the new **Due date** field on the form. You need to complete the next few steps to see the **Instruction** activity added earlier. There are several required fields:

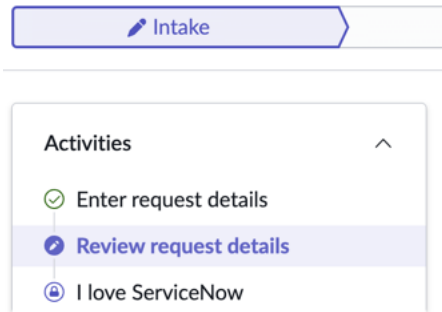
   Short description: **Enter whatever you like**
   Description: **Enter whatever you like**
   Preferred communication method: **Choose Email**
   Requestor type: **Representative of the news media**



5. Scroll down to the bottom of the form and click "Save.



6. Notice the playbook automatically advances to the next activity.

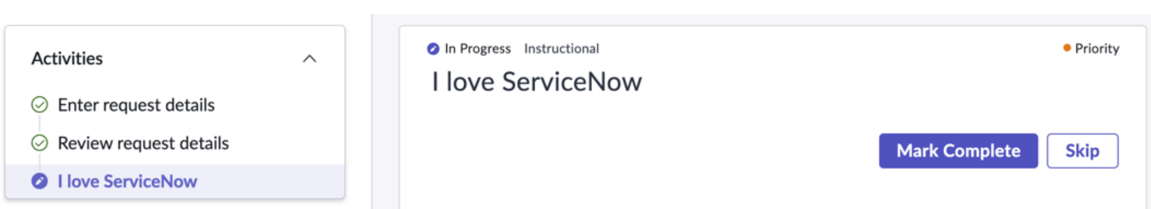


7. On the "**Review request details**" form click **Submit**.

8. Then "**Assign to me**".

9. Then "**Move to Review**".

10. Notice the playbook automatically advances to your new Instruction activity.



Congratulations! You have completed Lab 1.

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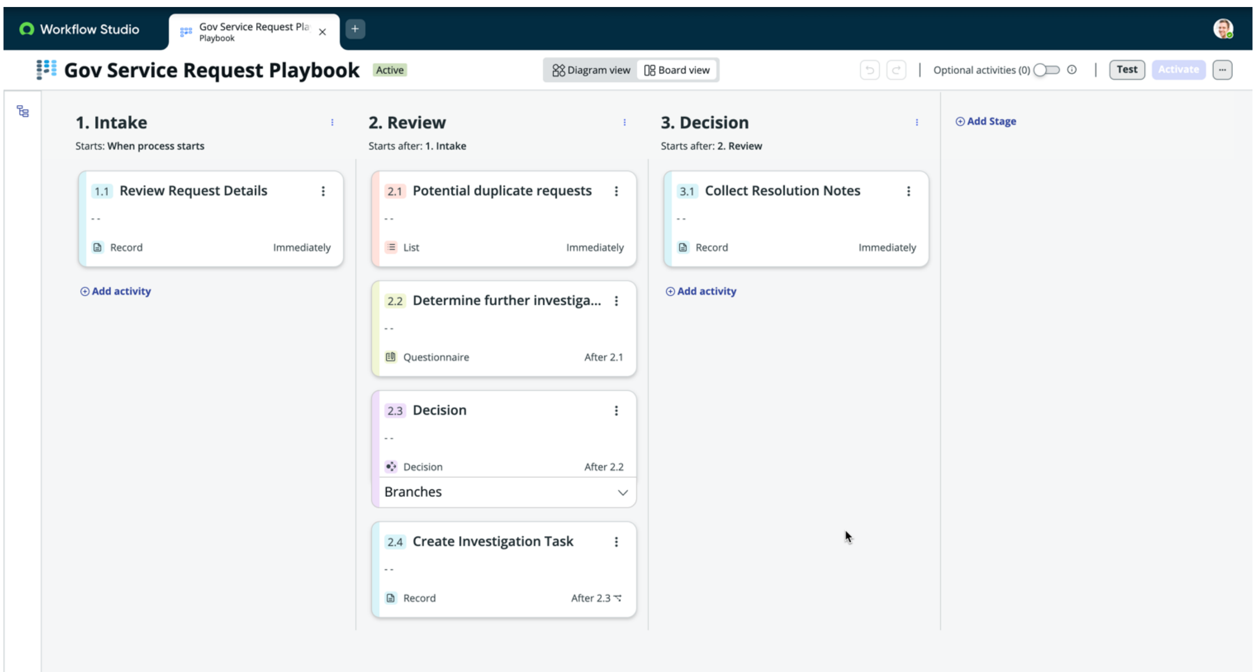
Lab 2 – Configure a Playbook from Scratch

Background / Purpose

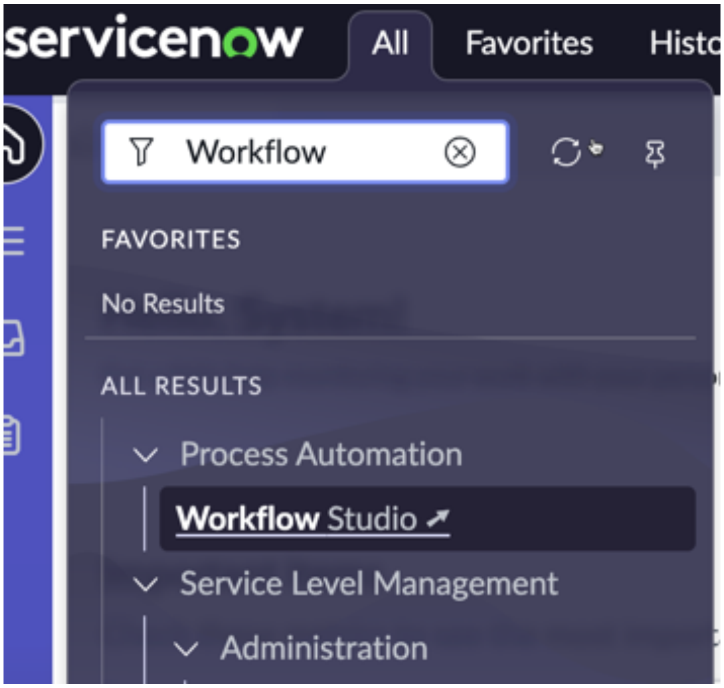
In this exercise you will create a new playbook from scratch. You have received requirements to configure a playbook for a Government Service Request. Yes, you could easily extend the out of the box Service Request Playbook, but what's the fun in that?

The playbook will have several stages and steps, some of which will be automated, other will be manual. The purpose of this exercise is to introduce you to the authoring experience for developing new playbooks and some optional configuration settings which may be helpful. The playbook you create will guide an agent through the process of reviewing and resolving a case, as well as orchestrating work across multiple teams. When complete, your playbook will look like this:

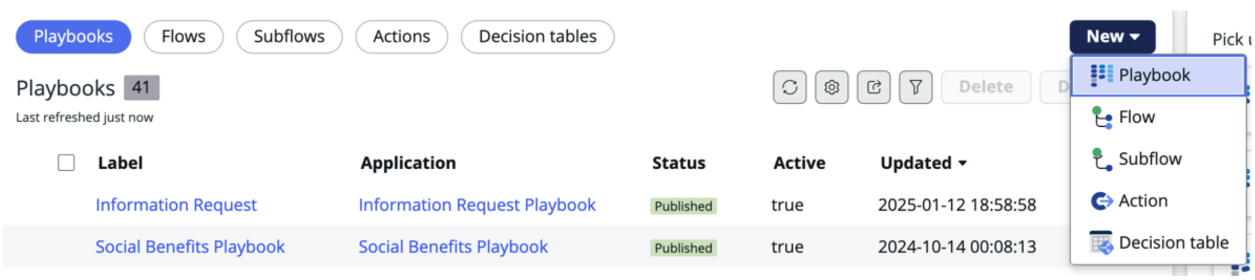


Lab 2, Exercise 1: Create a new playbook and define a trigger

1. If **Workflow Studio** isn't already open, navigate to **Process Automation > Workflow Studio**.



2. On the **Playbooks** tab, click "**New > Playbook**".



3. Provide a **Name** and optional **Description**. Then click **Build Playbook**.

   Playbook name: **Gov Service Request Playbook**
   Description: **Lab playbook for Fed Forum 2025**
   Application: **Choose Service Request Playbook**

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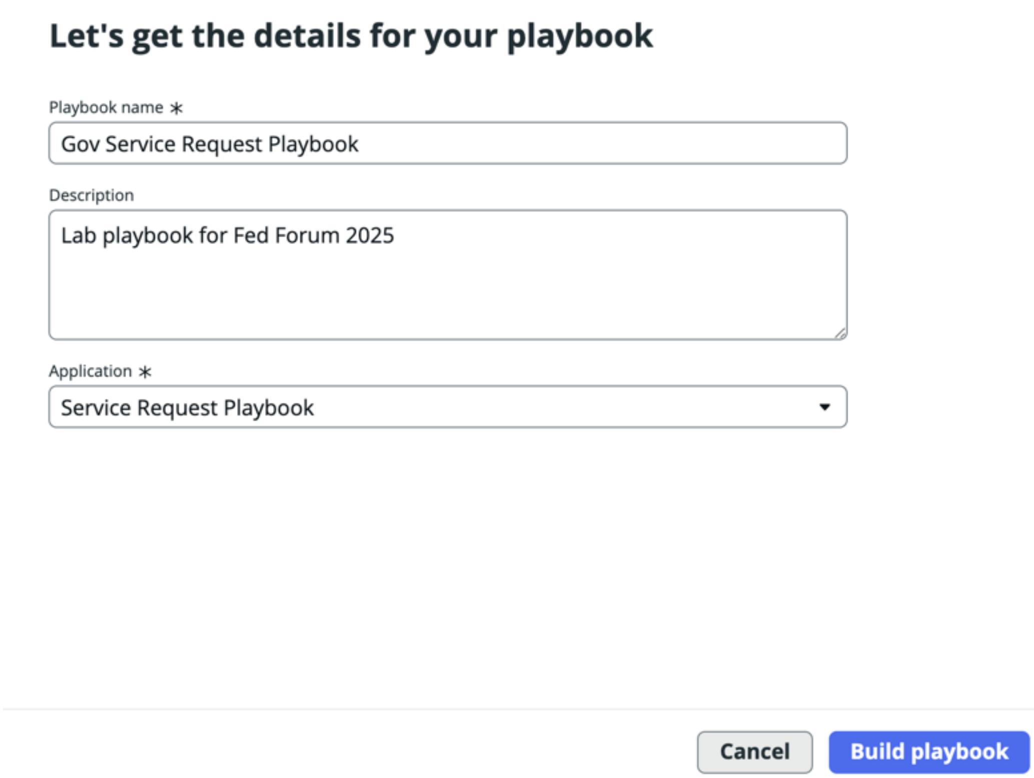
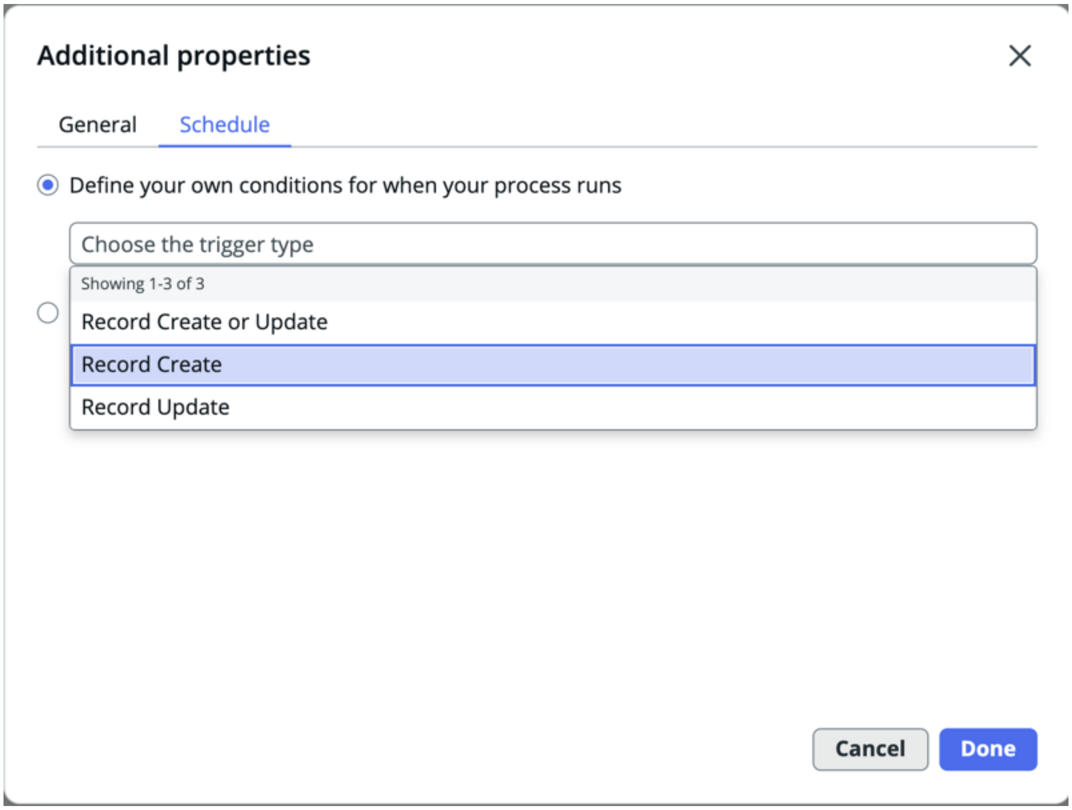
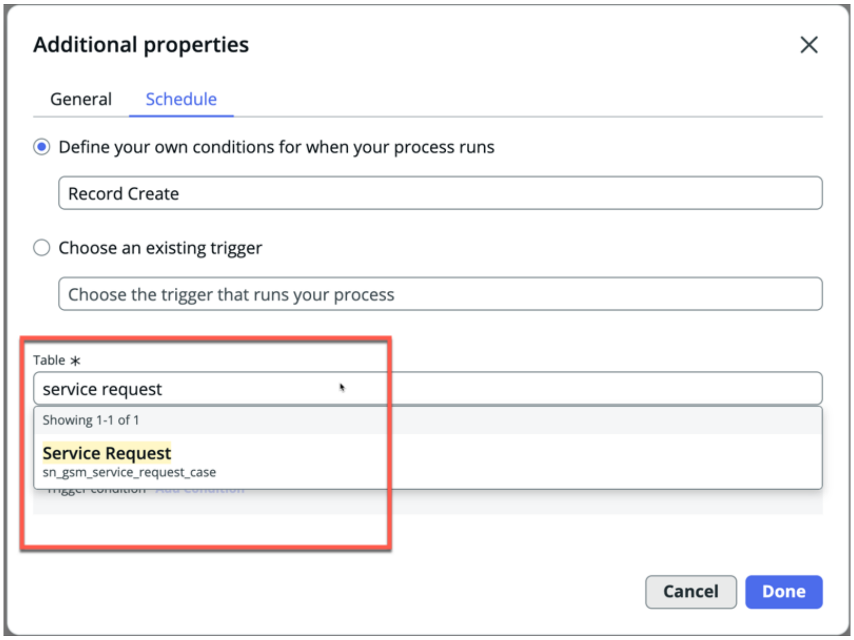


4. Click on the trigger shape.

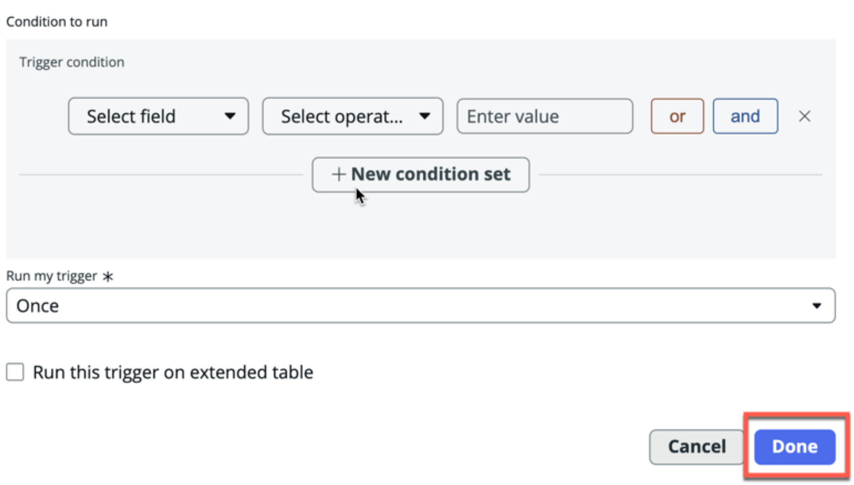
5. Select the first radio button to define your own trigger. Then chose Record Create.



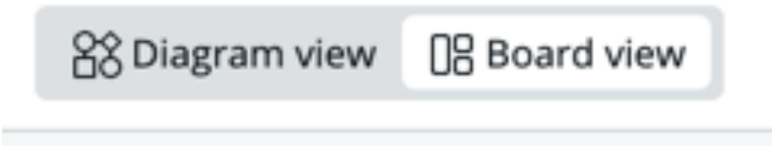
6. The Table field should now be showing. Start typing "Service Request". Select the Service Request table when it is showing in the dropdown.



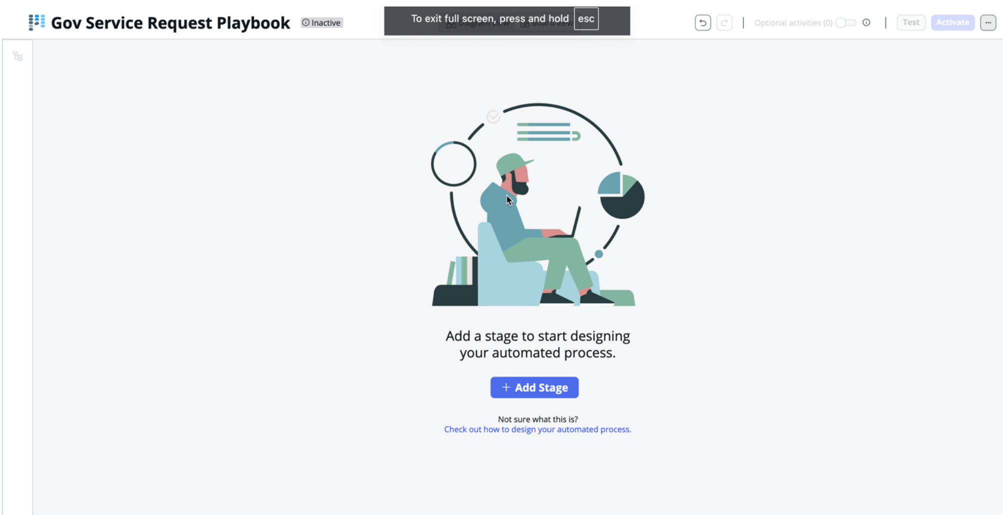
7. Ensure no conditions are configured and **Run my trigger** is set to **Once**. Click **Done**.



8. Our playbook is going to consist of three stages. All of the Public Sector out of the box playbooks follow a four stage paradigm (Intake, Review, Process, Decision), but the lab is shortened for brevity. To get started, change the view from **Diagram View**, to **Board View** by clicking **Board View** at the top center of page.

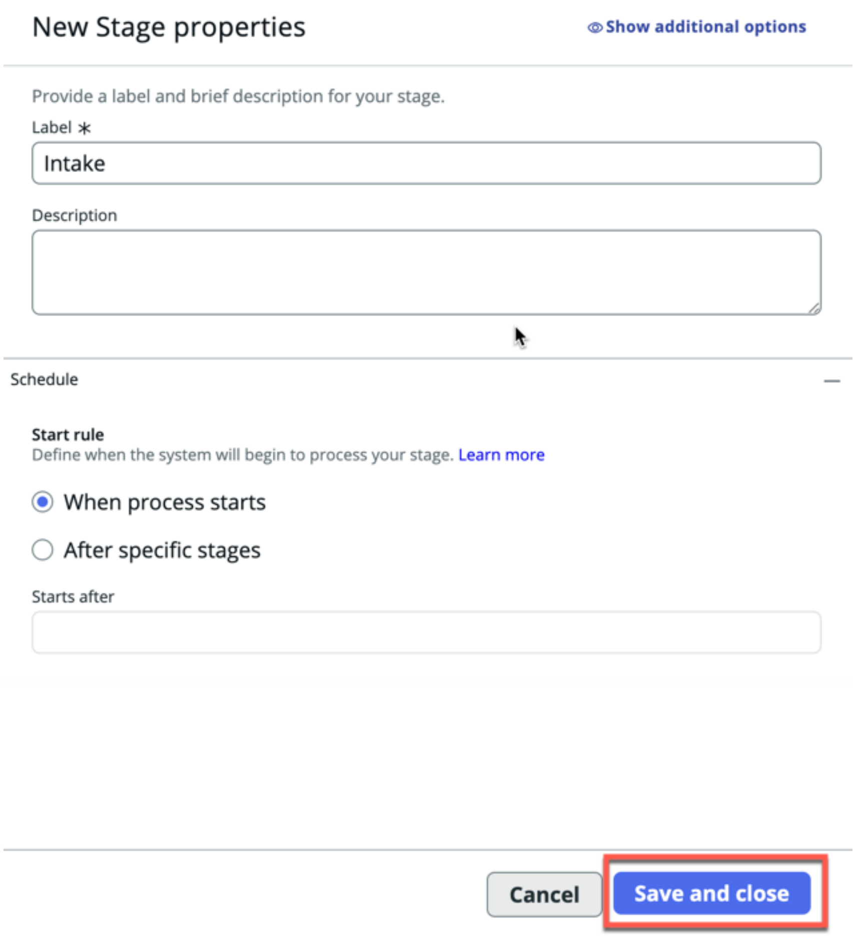


The view changes to this:

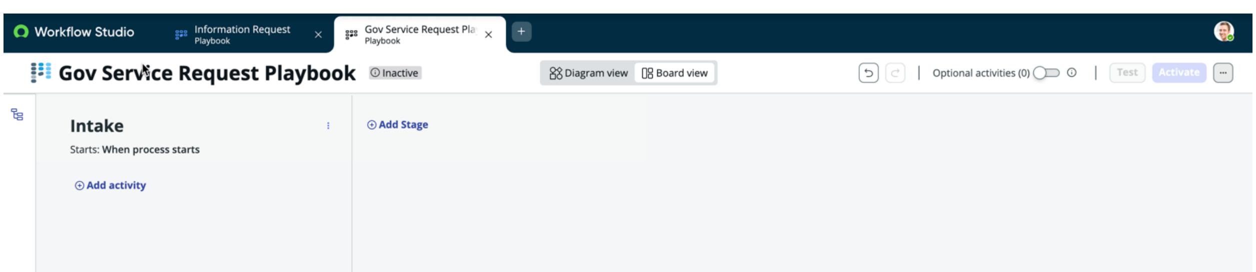


9. Clicking the “Add Stage” button enters you into the authoring experience.

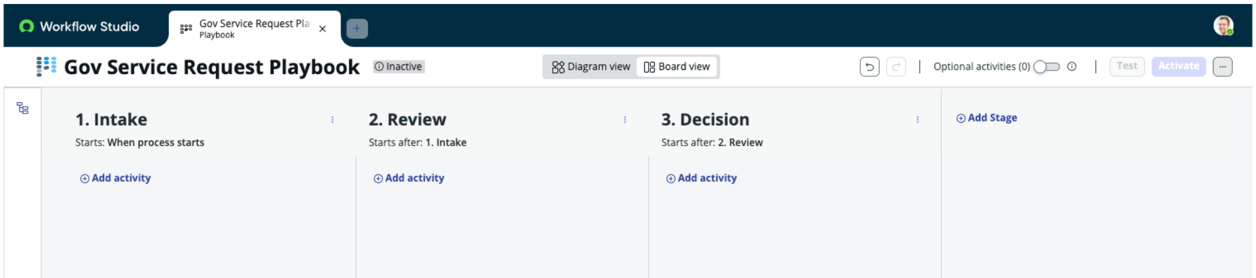
10. Our first stage name will be called **Intake**, so type that into the **Label field** of the **New Stage Properties panel**. Leave the Schedule at **When the process starts**.



11. After selecting **Save and close**, your first stage will be defined.



12. Add the remaining three stages. Select the **Add Stage button** (not the Add activity button), and set the **Labels** to **Review** and **Decision**. For Review, notice the **Schedule** is set to run this stage after the previous Intake stage is complete.



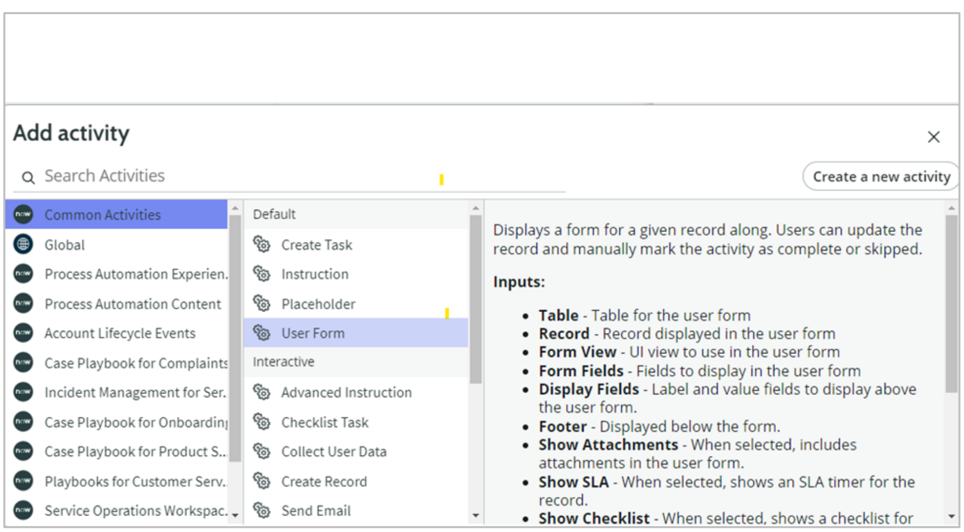
Lab 2, Exercise 2: Configure the Intake Stage

Playbooks are designed to be intuitive to both the business SME's who own the process, and to the technical team configuring them. The low-code design approach allows business and IT to collaborate side-by-side to ensure that the process being developed in PAD reflects the wants and needs from the business. Workflow Studio accomplishes this by allowing the business and IT to collaboratively decompose and model the designed business process in a way that is outcome driven, and mimics the way in which work actually flows from intake to resolution.

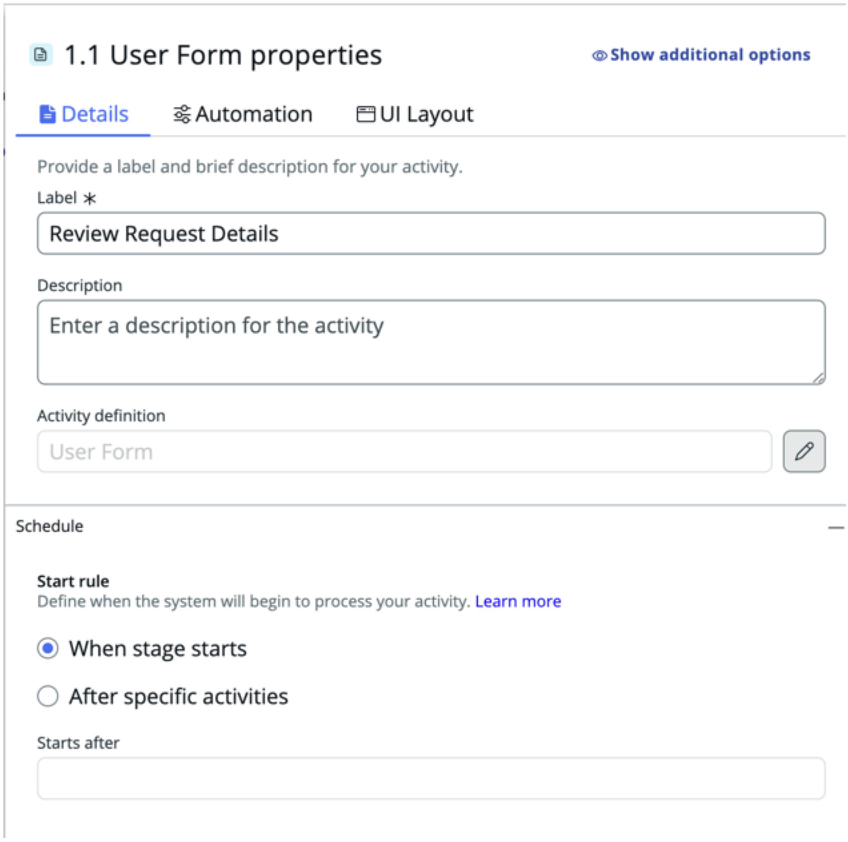
With that in mind, let's continue to elaborate on our playbook's business process by configuring the steps and activities that will be performed during Case Intake.

1. Under the **Intake** stage, click **Add Activity**.

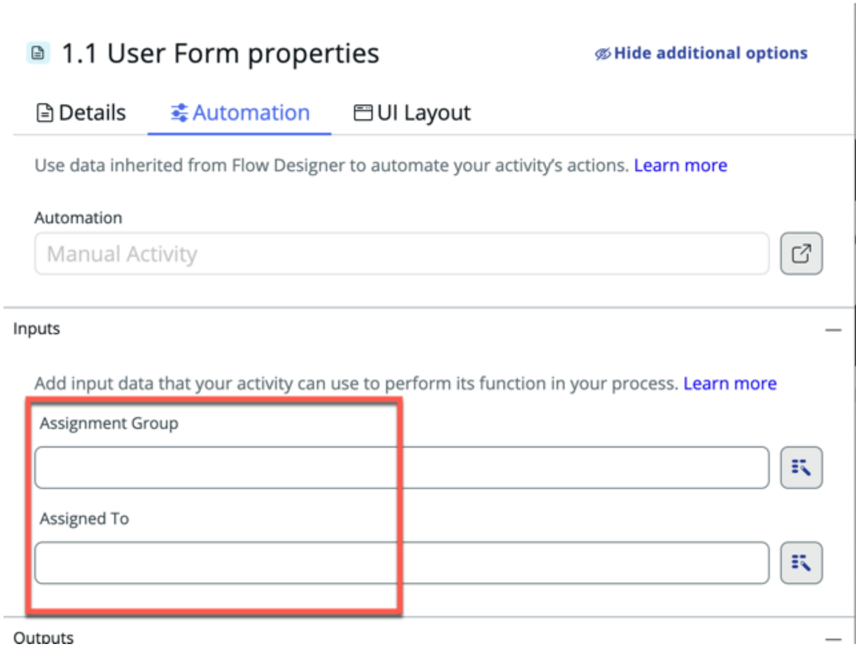
2. In the **Add activity pop up menu box** you will see many common playbook options that are available. For our first Intake activity you want to present some details to the agent and provide the ability to add data to it. You will select the **User Form** from the Default list, or you can start typing User in the Search Activities to find the correct activity.



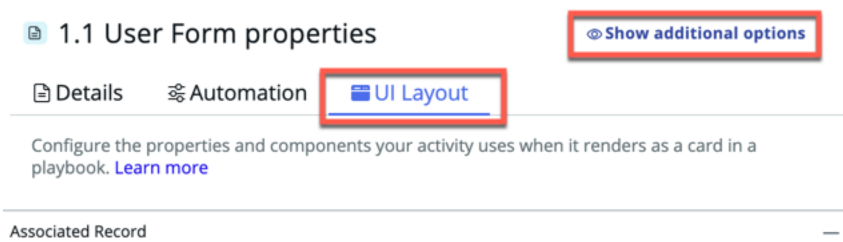
3. In the **Details** section of the new user form activity, enter the Label **Review Request Details** and leave all else as default. Select the **Automation Tab** next to the **Details tab**.



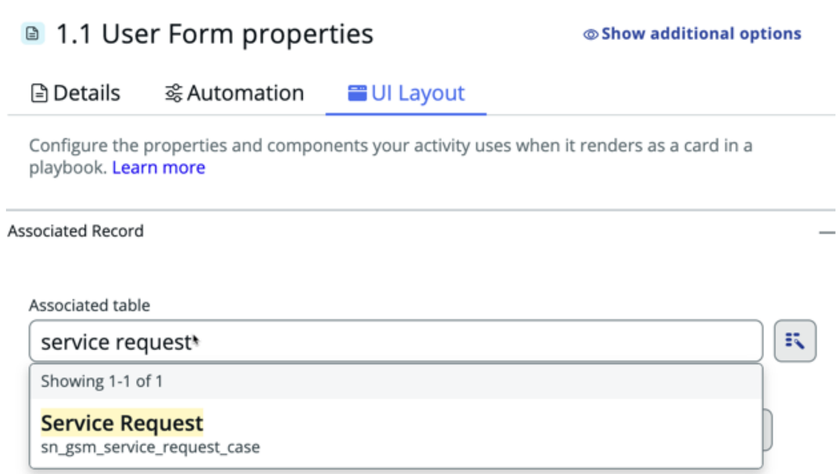
4. Under the **Automation tab Inputs section (you might need to "Show Additional Options")**, you have the ability to assign this activity to a particular group or person. This allows for cross functional collaboration throughout the lifecycle of the playbook. You will be leaving this untouched but keep it in mind when you are designing your own processes.



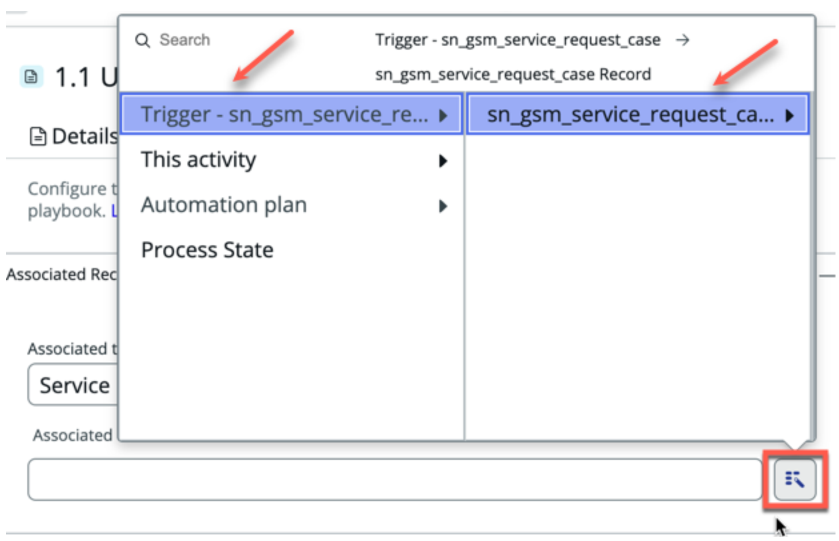
5. Click **UI Layout** and then **Show Additional Options**.



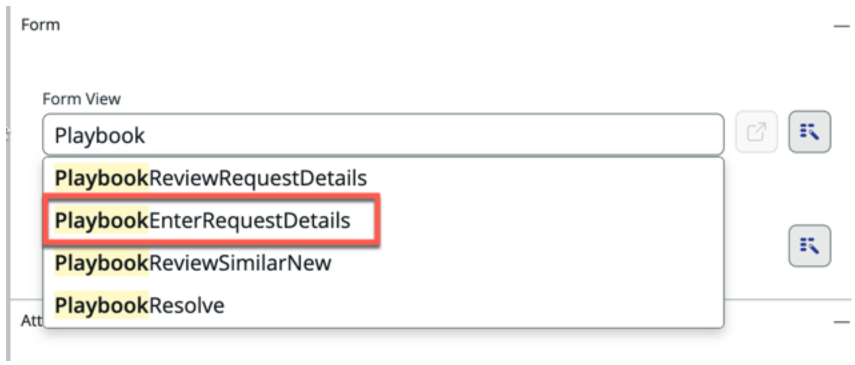
6. Set Associated Table to **Service Request**.



7. Then you need to set the **Associated Record**. This tells the playbook to use the current case at runtime. Click the **Search** button to the right of the field. Click the **Trigger**, then click the record **sn_gsm_service_request_case**. This is the base Service Request case record. You will perform this similar action throughout the playbook authoring process.



8. Scroll down to **Form View**. A few things to note here. Depending on your needs for this particular activity, you have several options. You can specify an entire form, or if only a few fields are needed, you can choose a handful of required fields for the activity using Form Fields. Lastly, if you would like to display fields as read only, use the Record Fields just above the form fields. For this activity, you will specify a form. So click into the Form View field and several options display. Select **PlaybookEnterRequestDetails**.



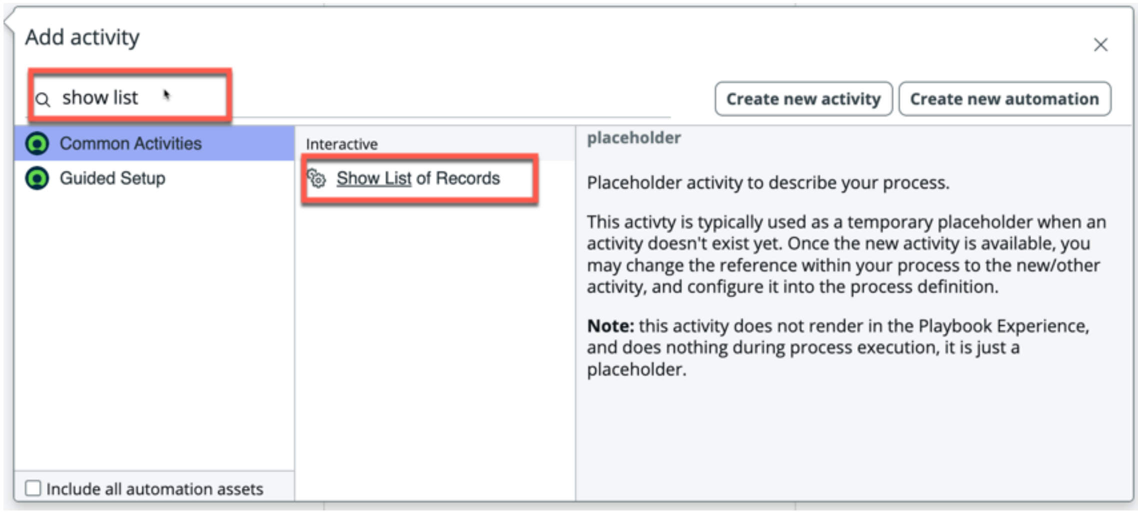
9. Feel free to review other activity Features under the form settings. Once done, click **Save and close**.

Congratulations, you configured the first stage of the playbook! When a new case is created, the playbook will present the agent with the form for them to review the current case.

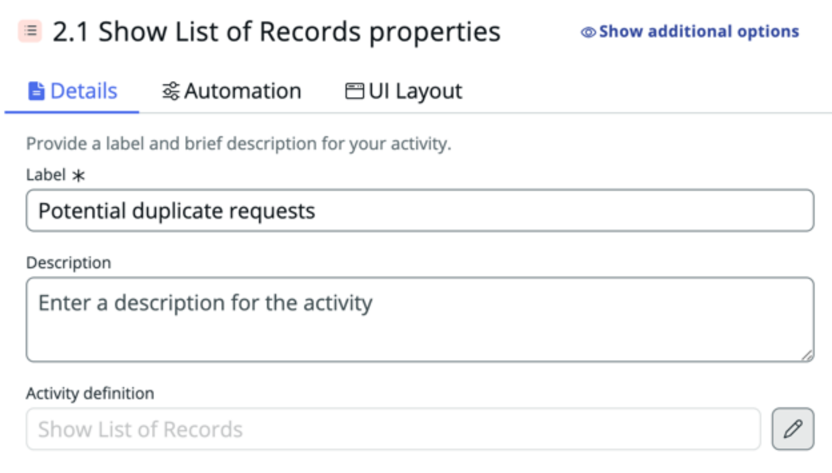
Lab 2, Exercise 3: Configure the Review Stage

The Review stage will be the more complex stage you configure in this lab. Several steps will be performed. First you need to understand if the requestor has submitted similar cases. And quite often, human judgement is needed during the lifecycle of the playbook. So you will configure a simple questionnaire to assess whether or not further investigation is needed. If so, a task is created for followup.

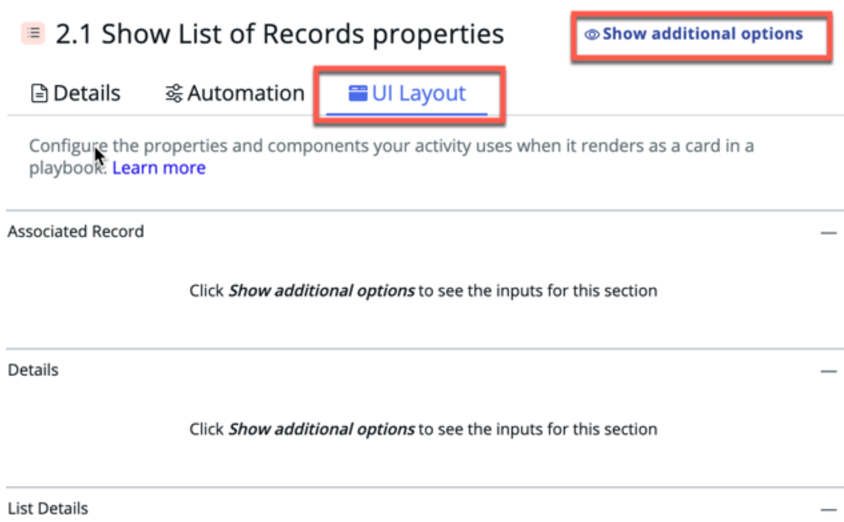
1. In the **Review** stage, select **Add Activity**. Search for "**Show List of Records**", then select the activity in the middle window. This activity allows you to display a list of records from any table in the system based on your search criteria. The criteria will dynamically applied at playbook runtime and will be based off of data submitted earlier in the playbook.



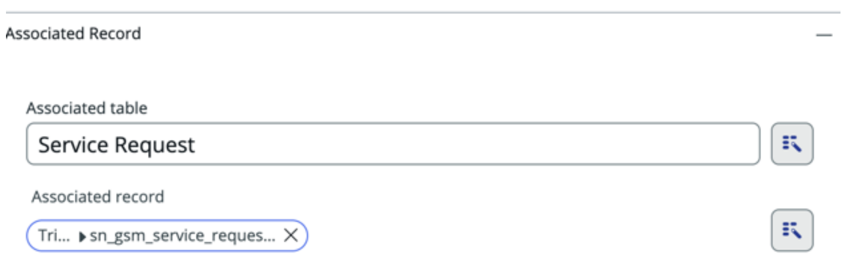
2. Change the label to "**Potential duplicate requests**".



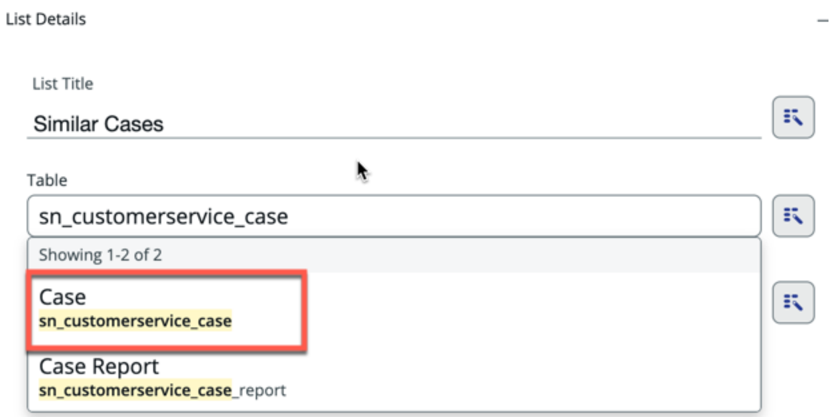
3. Select UI Layout then Show additional options.



4. Select **Service Request** and use the search button to navigate to the **Trigger Record**, just like in Step 7 above.

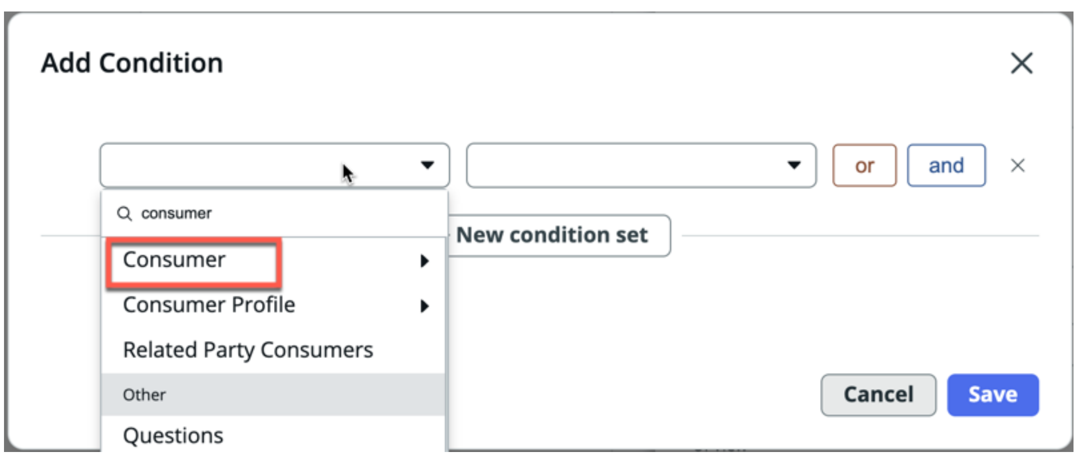


5. Scroll down to **List Details** section. Set **List title** to "**Similar cases**". In the table field, type **sn_customerservice_case**. There are several tables with the word Case in them so this gets to the base Customer Service case.

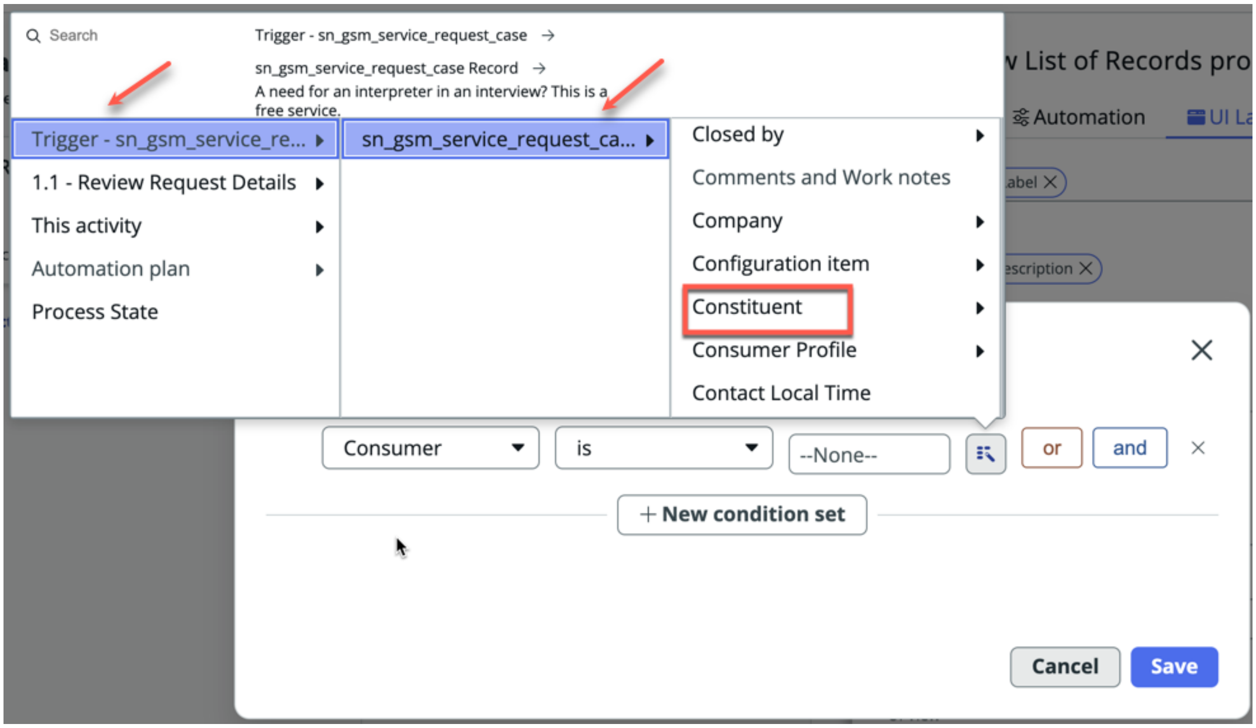


6. Once the table is selected, the condition builder becomes available. Select Add Condition.

7. In the condition builder, select **Consumer**.

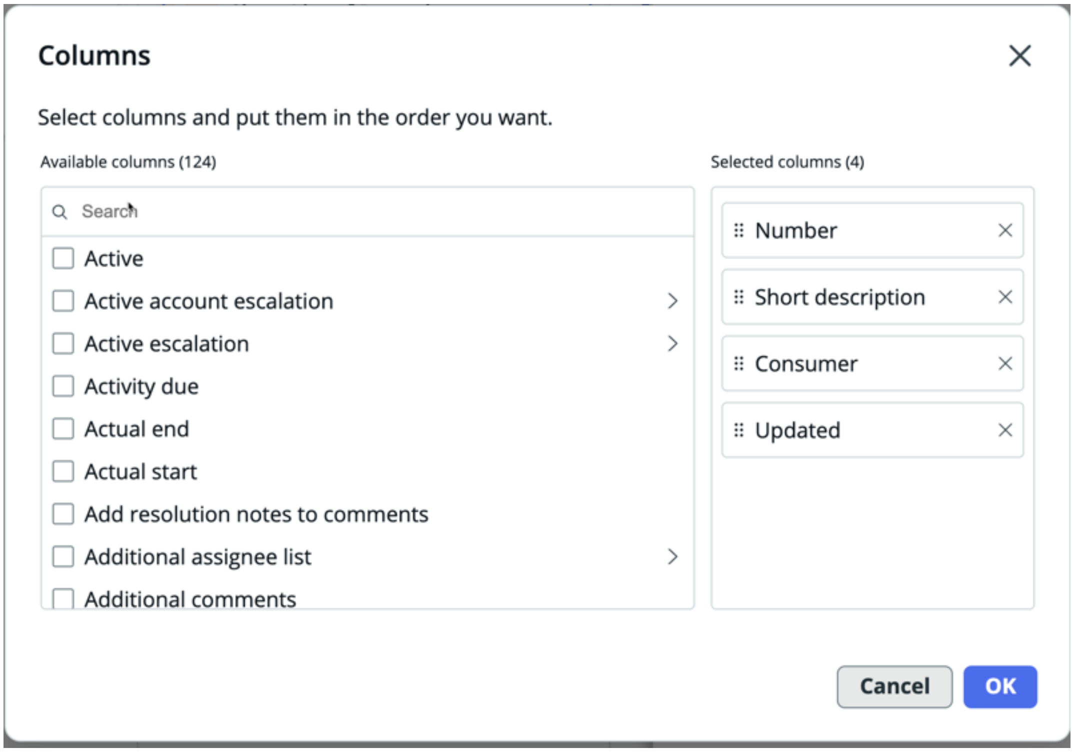


8. Select "Is" for the condition, then using the data picker icon, select **Trigger-sn_gsm_service_request_case > sn_gsm_service_request_case > Constituent**. Click **Save**. Essentially, this condition builder is saying "I want to see all cases in the system, where the consumer equals the constituent who the main request is for."



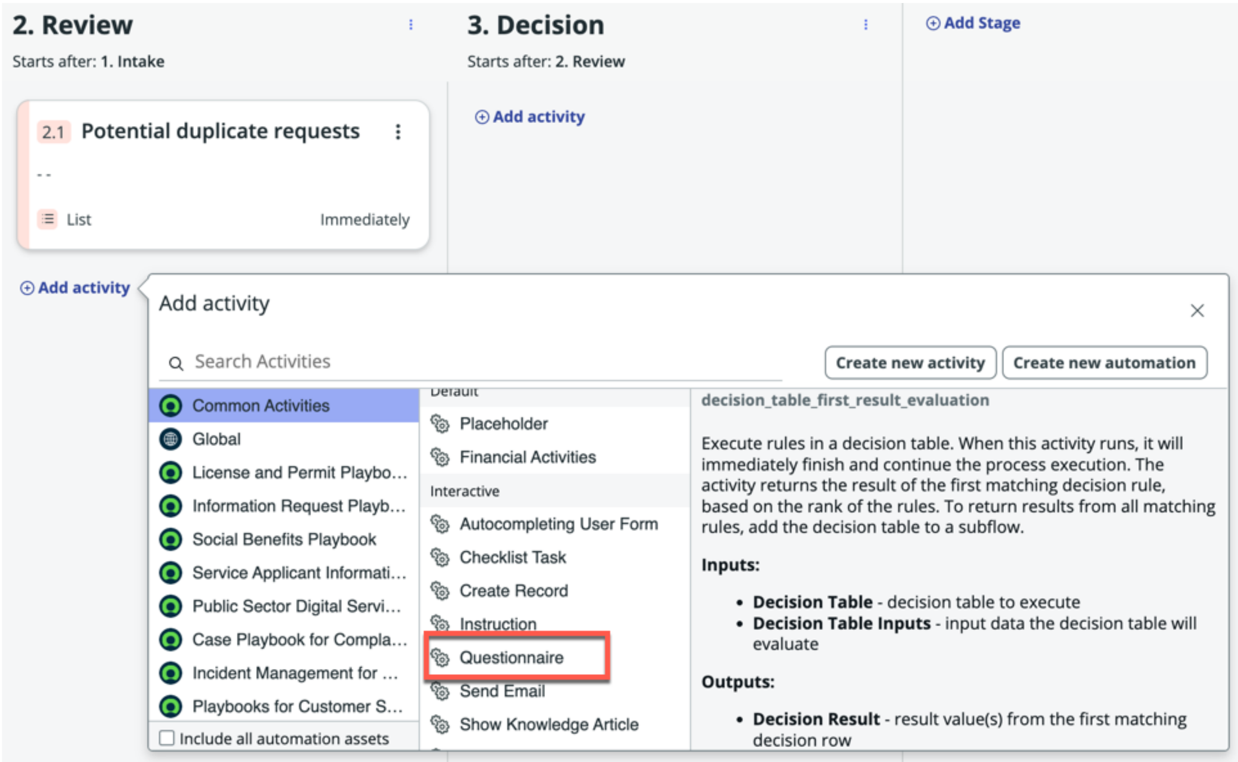
9. You need to show a few columns from the table so under **Columns**, click **Click to add**.

10. Search for and select the following columns: **Number**, **Short description**, **Consumer**, **Updated**. Click Ok.

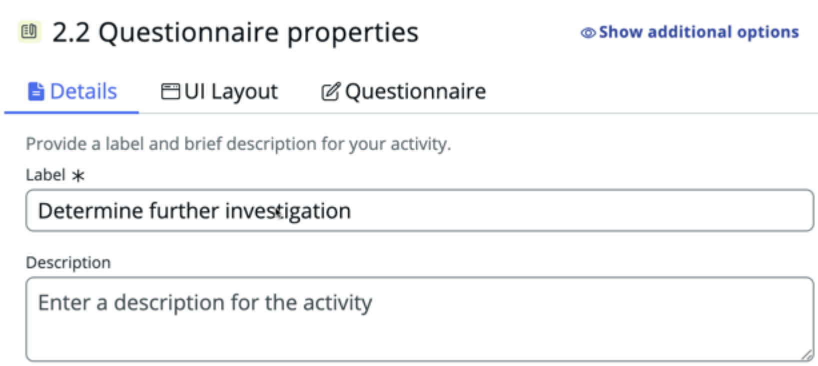


11. Then Save and close.

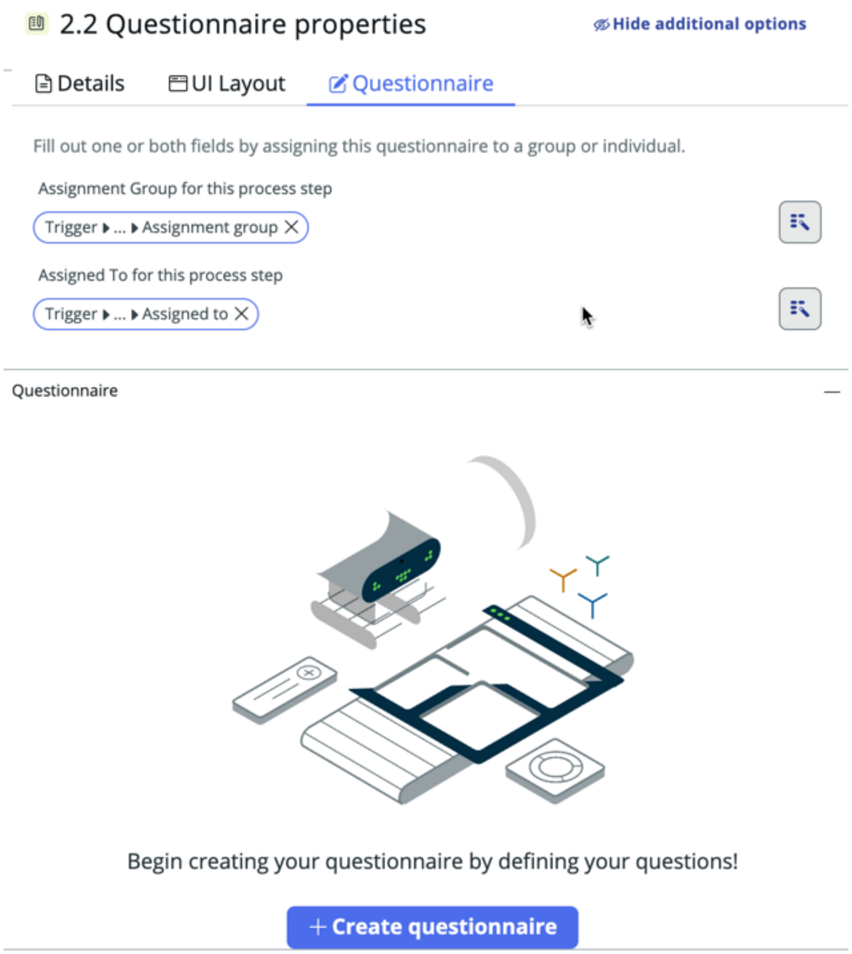
12. As previously mentioned, quite often process require human intervention. The Questionairre activity will be used to allow the agent to decide if any of the potential duplicates requires further investigation. In the Review stage, select **Add activity**. Select **Questionairre**.



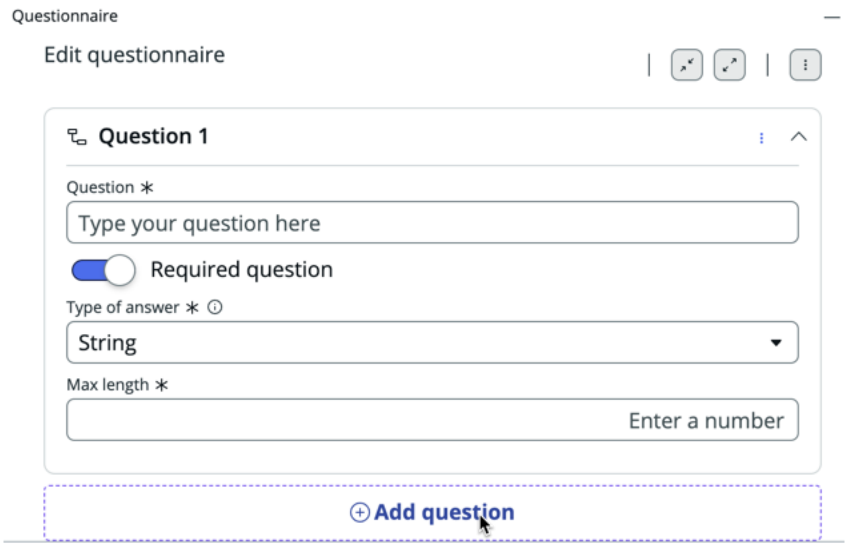
13. Select Details and change the label to "**Determine further investigation**."



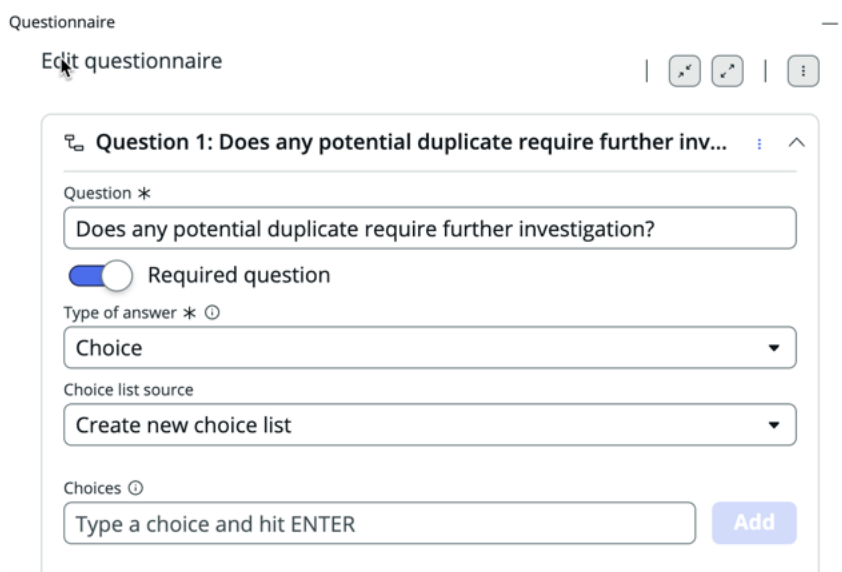
14. Select the **Questionnaire** tab and scroll down and select "**Create Questionnaire**."



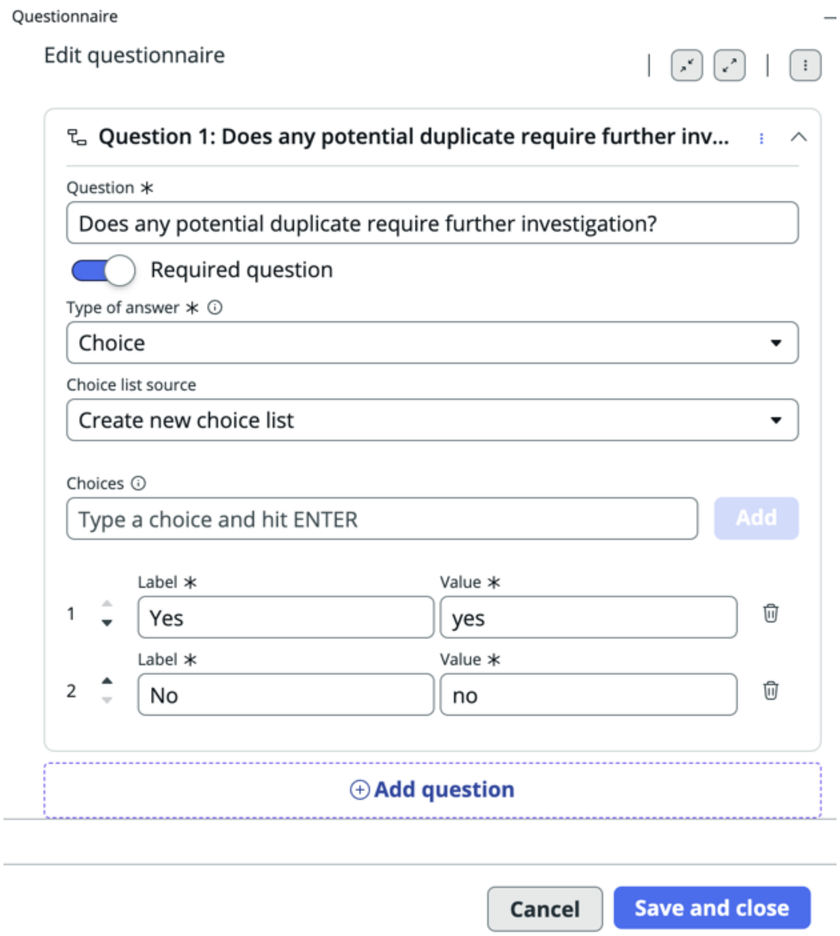
15. Click **Add Question**. For time sake, you are only going to add a single question, which allows you to make a decision.



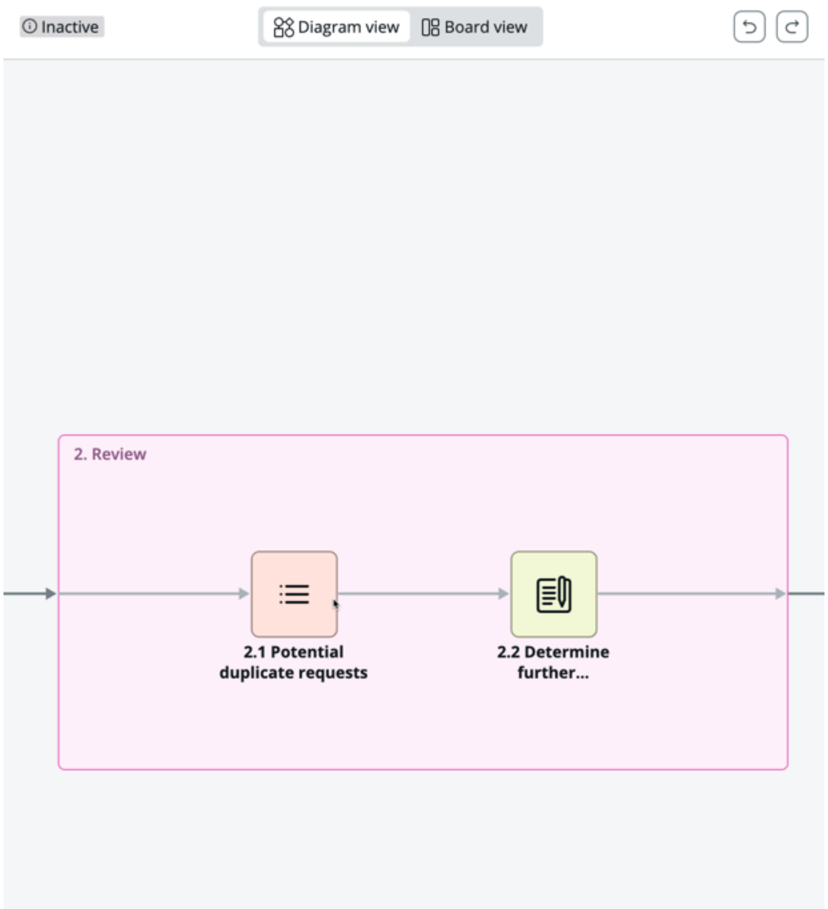
16. Set the question field to "**Do any potential duplicates require investigation?**" and the Type of answer to Choice.



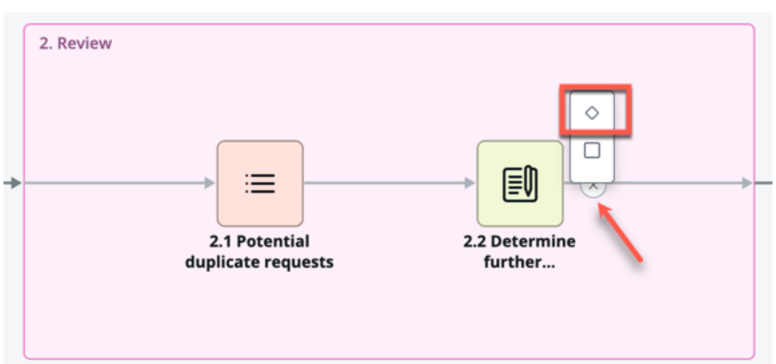
17. Add two choices, **Yes** and **No**. Click **Save and close**.



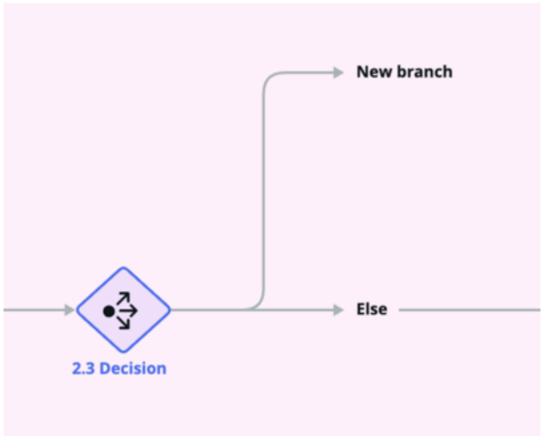
18. For this next step, you will switch to **Diagram View** to better visualize our decision branching.



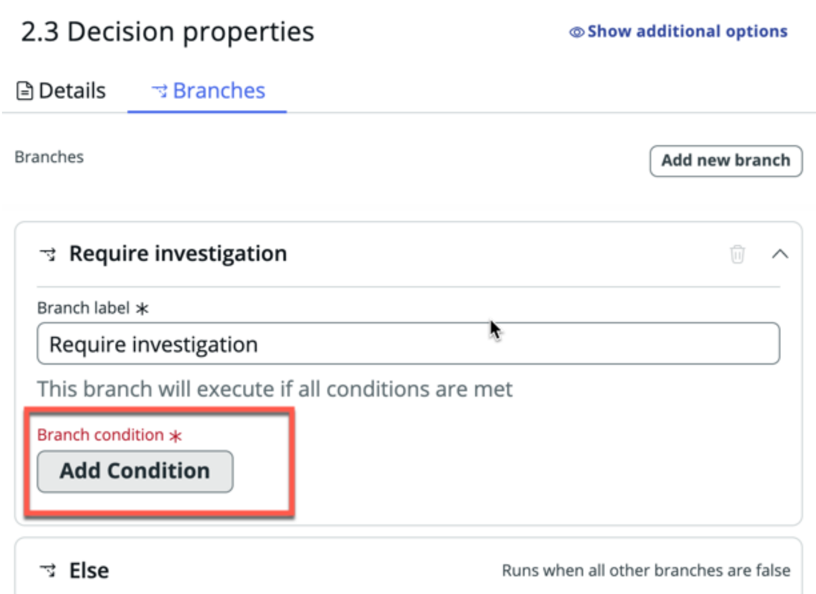
19. Click the Plus sign to the right of 2.2 Determine further investigation, then click the Decision shape.



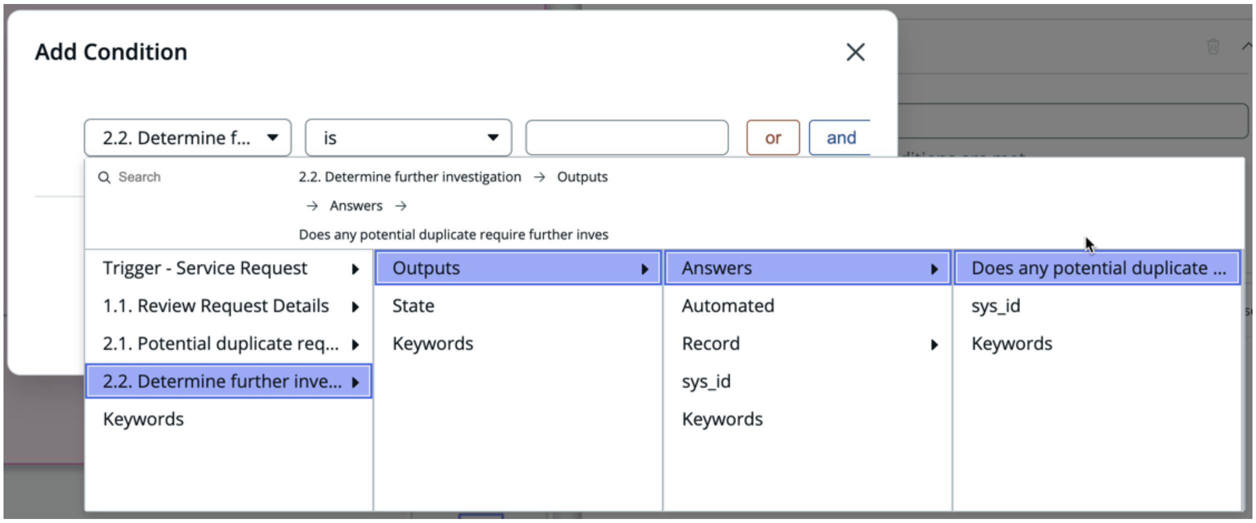
A decision shape is added to the canvas and the branches need to now be configured.



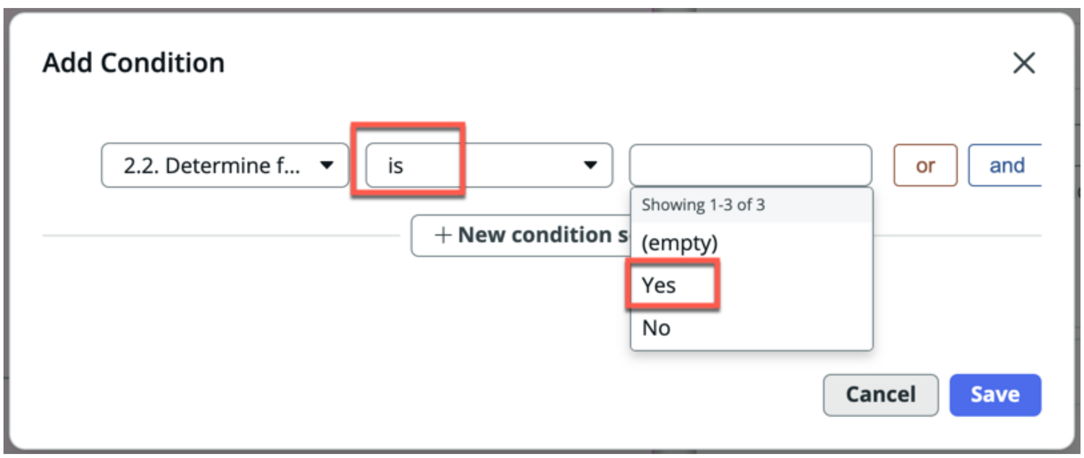
20. The process only has two branches, so you will configure the primary branch then all other conditions will follow the **Else** branch. Change the Branch label to "**Require Investigation**." Click **Add Condition**.



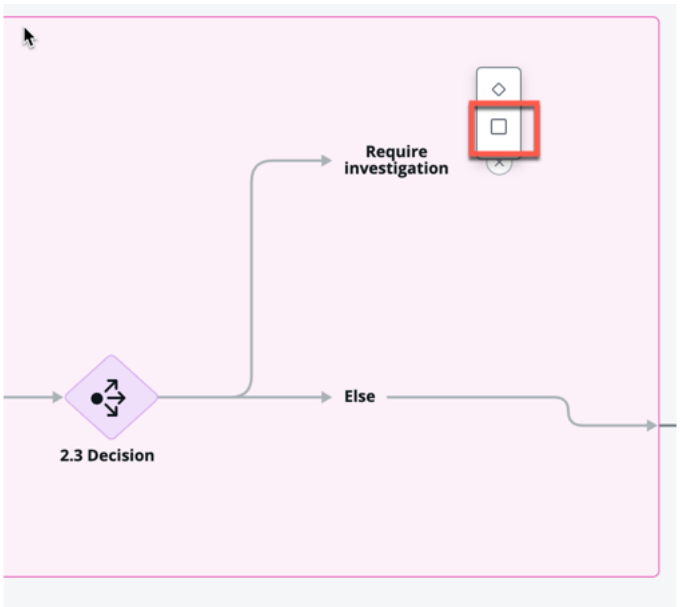
21. Select **2.2 Determine further investigation > Outputs > Answers > Does any potential duplicate require investigation**. This dynamically references the results of the question answered in the previous step.



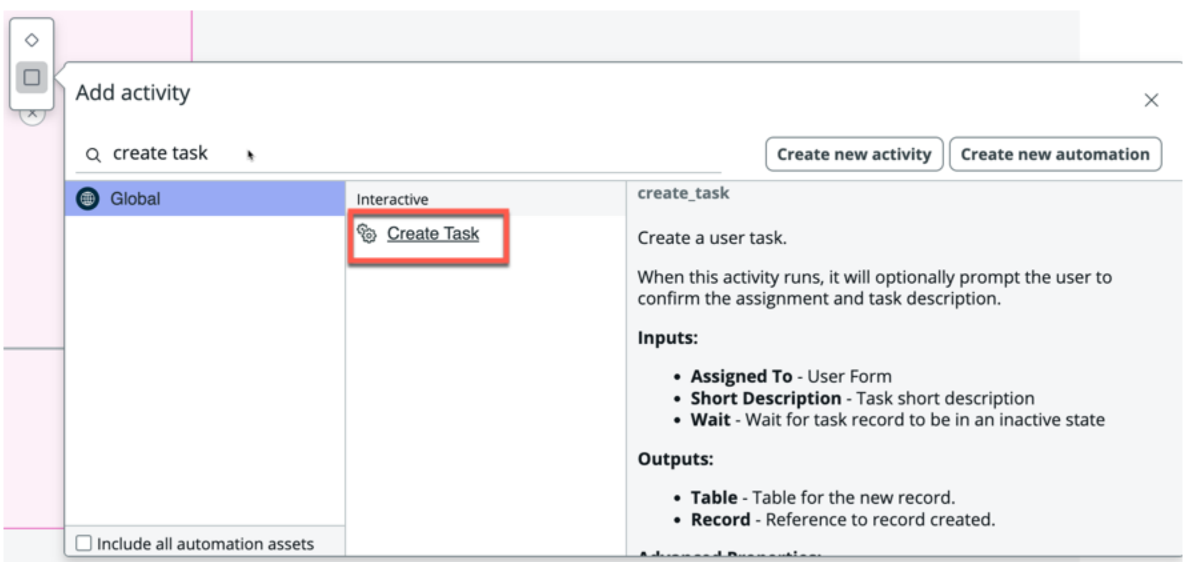
22. Set the condition to "**Is**", then select **Yes**. Click **Save** then **Save and close**.



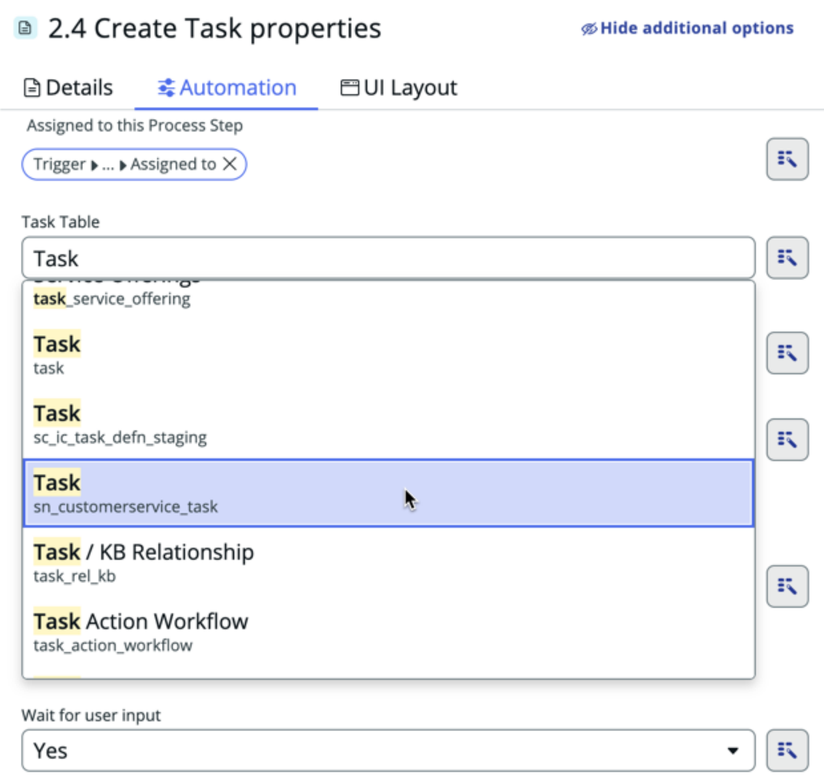
23. Back on the canvas, select the **Plus** sign next to **Require investigation** then select the activity shape.



24. Search for "**Create task**", then select the Create task activity.



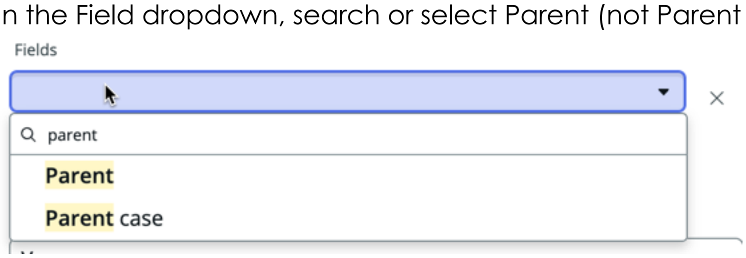
25. On the Details tab, change the Label to "**Create Investigation Task**." Click the Automation tab and **Show Additional Options**. Scroll down to the Task Table field. In the Task table field, either scroll down to **Task** (**sn_customerservice_task**) or type the **sn_customerservice_task** in the field to narrow down the choice. This is the base task for all Industry solutions.



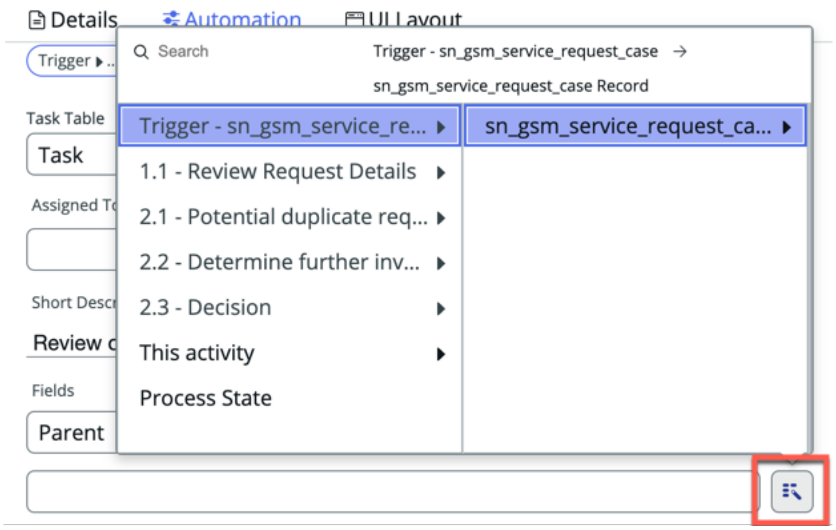
26. In the Fields section, you need to supply the task with data from the parent case. Set the **Short description** to **Review duplicate cases**.

27. Click **Add field**.

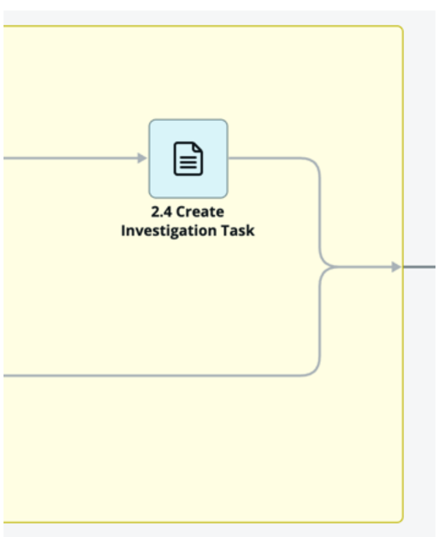
28. In the Field dropdown, search or select Parent (not Parent case).



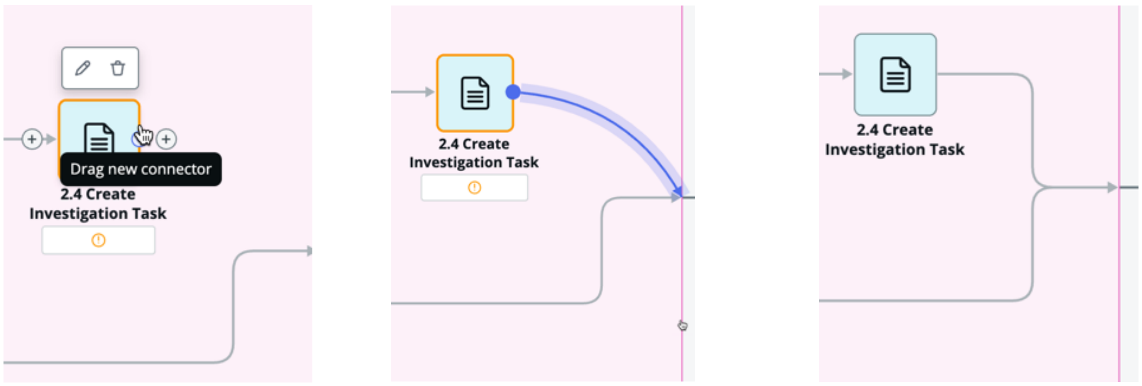
29. Using the data picker, chose **Trigger – sn_gsm_service_request_case > sn_gsm_service_request_case**. Then **Save and close**.



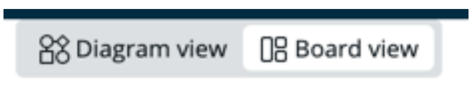
30. The **Create Investigation Task** should automatically connect to the exit of the stage. If not, follow the next step.

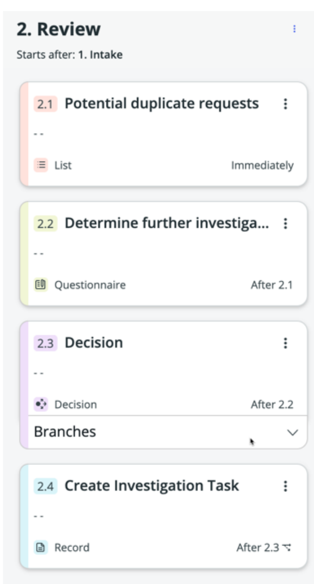


31. **(If needed)** Next you need to connect the right connector to the stage exit.



32. Switch back to Board view and observe the updated stage activities.

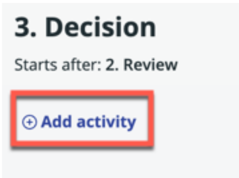




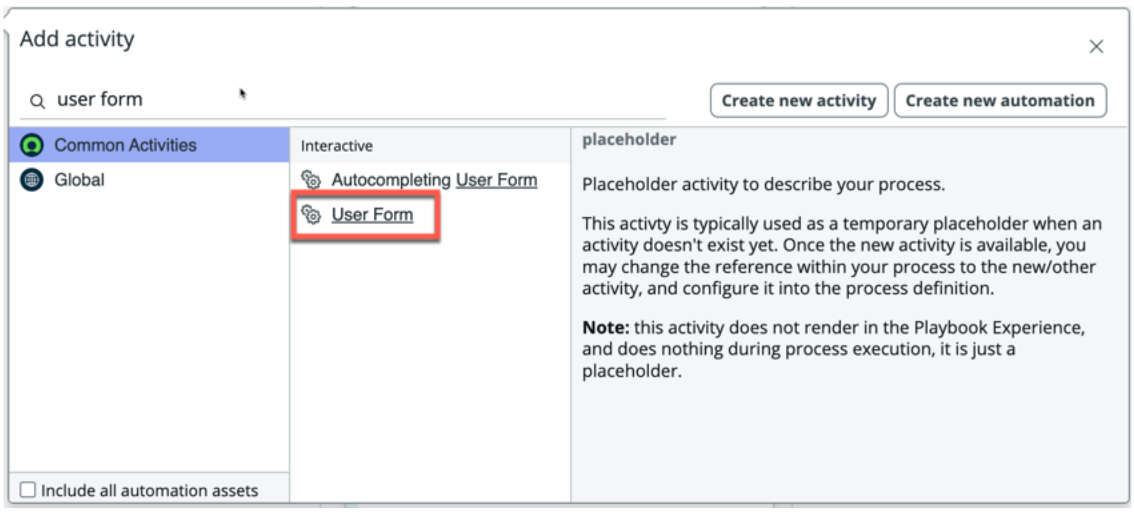
Lab 2, Exercise 4: Configure the Decision Stage

The final stage of the playbook will be a single activity setting the final state and collect final notes before the case is closed.

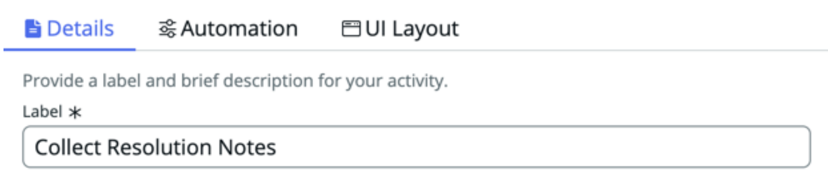
1. In the **Decision** stage, click **Add activity**.



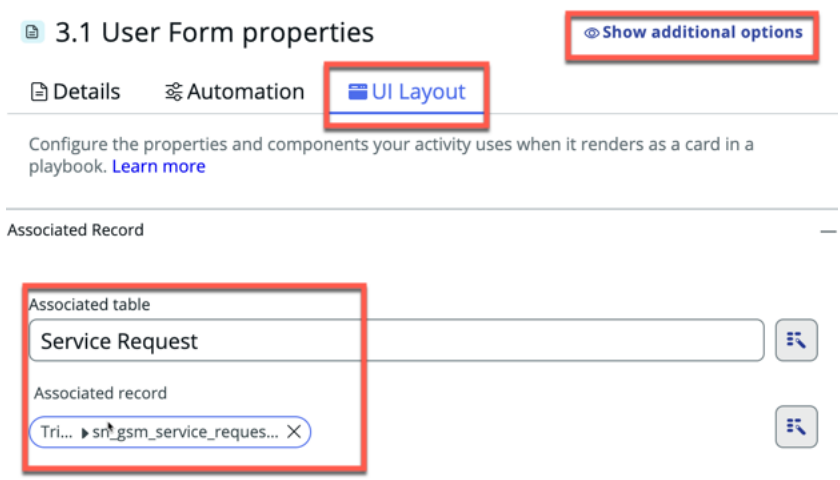
2. You're going to use the User form activity like you did earlier in the lab.



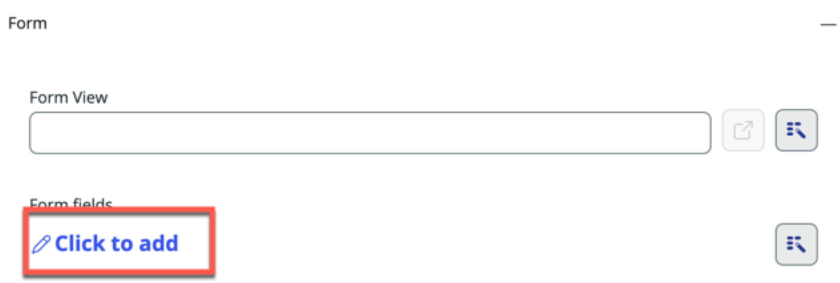
3. The configure window pops out. Set the **Label** field to **Collect Resolution Notes**.



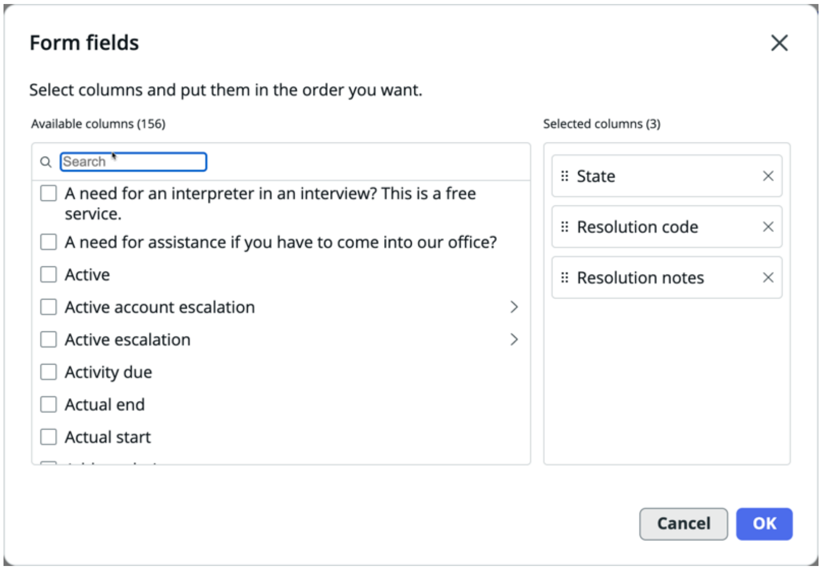
4. Select the **UI Layout** tab, select **Show additional options**, set **Associated table** to **Service Request**, and **Associated Record** to **Trigger – sn_gsm_service_request_case > sn_gsm_service_request_case**. Just like you did earlier in the lab.



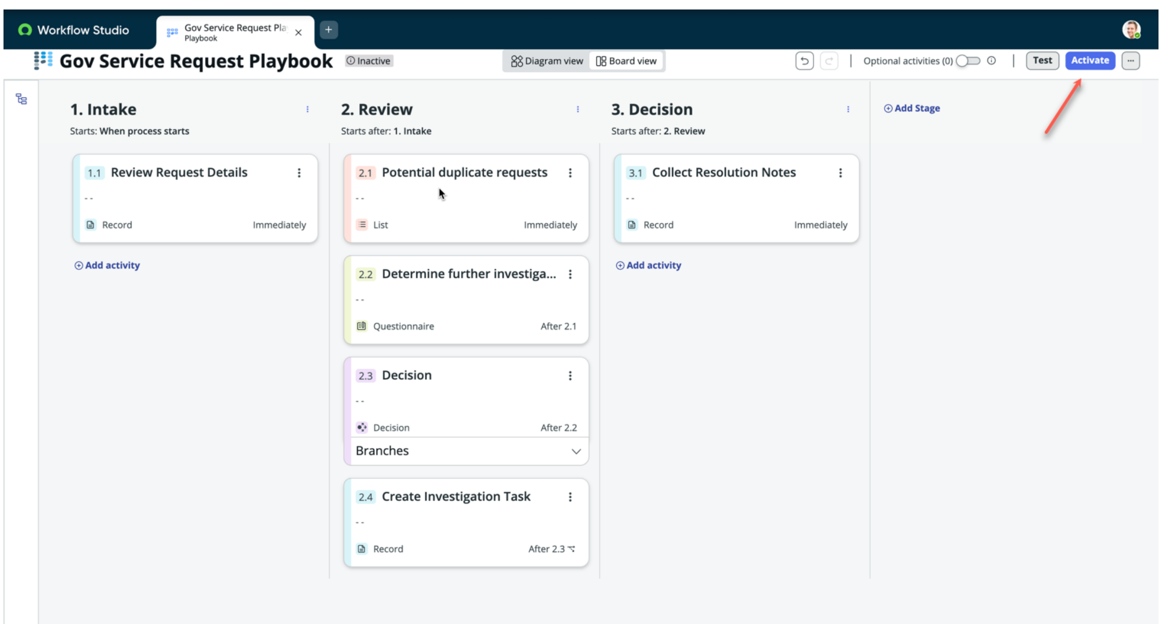
5. Since you only need a few fields, scroll down to **Form fields** and click **Click to add**.



6. Search for or select **State** (not State/province), **Resolution code**, and **Resolution notes**. Click **Ok** then **Save and close**.

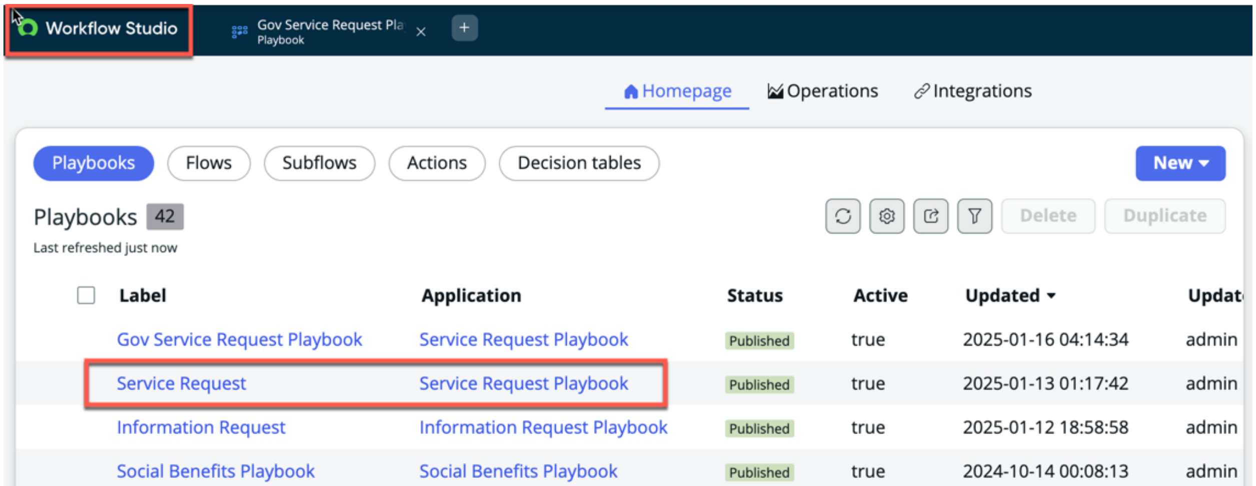


7. The playbook is now complete. Click **Activate** in the top right corner.

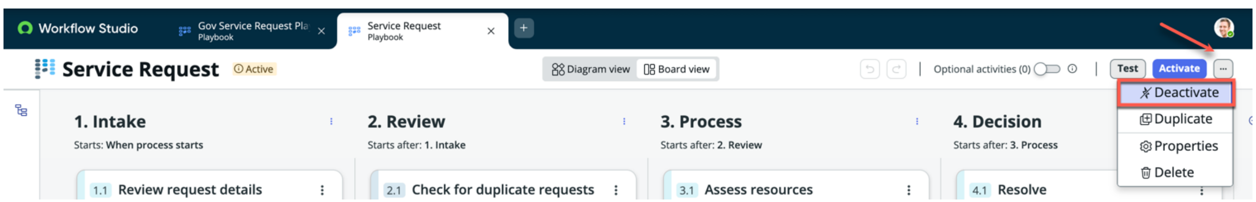


Lab 2, Exercise 5: Test your playbook

1. In order to test the new playbook, you need to deactivate the existing Service Request playbook. Click the Workflow Studio logo, then ensure Playbooks tab is visible. From there, open Service Request playbook.



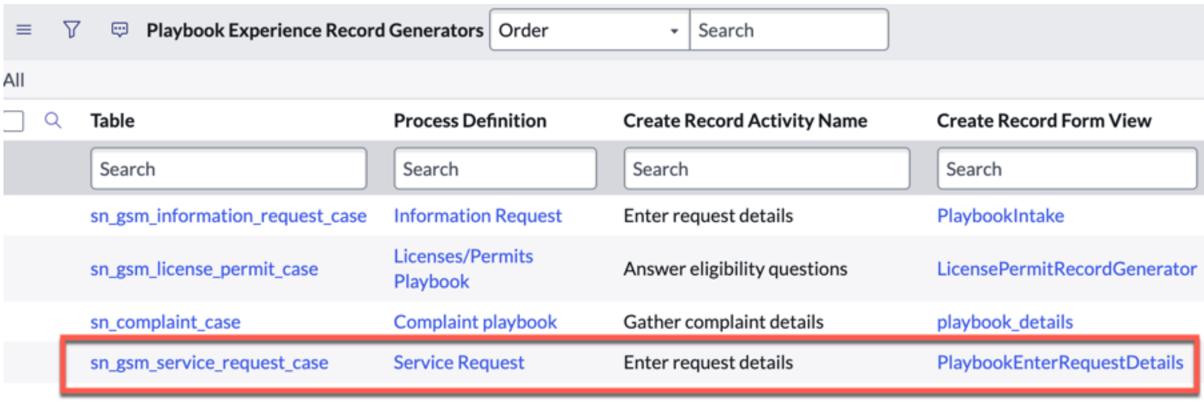
2. Click the button with 3 dots on the far right, then choose Deactivate from the dropdown.



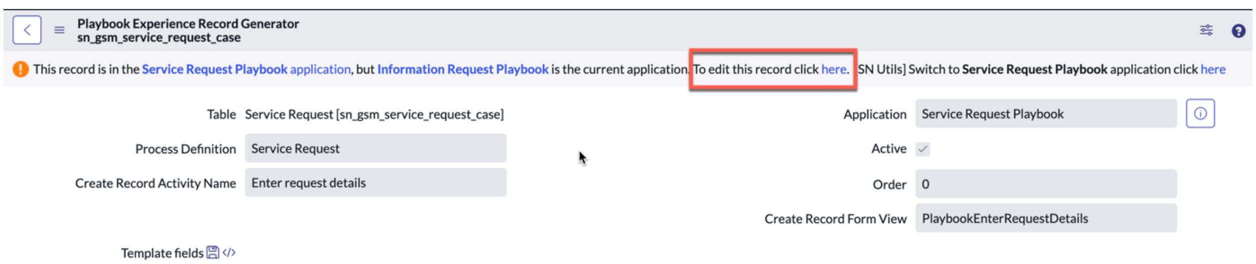
The playbook should then show as inactive.

3. You need to configure what is called a **Record Generator**. This allows us to collect some initial information before the case is actually created but while in the context of the playbook. This provides a consistent experience for agents. Why do you need this? Remember the trigger you configured will only execute once the service request case is created. So you need a way to collect that information ahead of the case creation.

   Workflow Studio originally opened in a new browser tab. Proceed to the previous browser tab. Click All then from the filter navigator type **record generator** or navigate to **Playbook Experience > Record generator**. Locate the line refering to **sn_gsm_service_request_case** and open it.

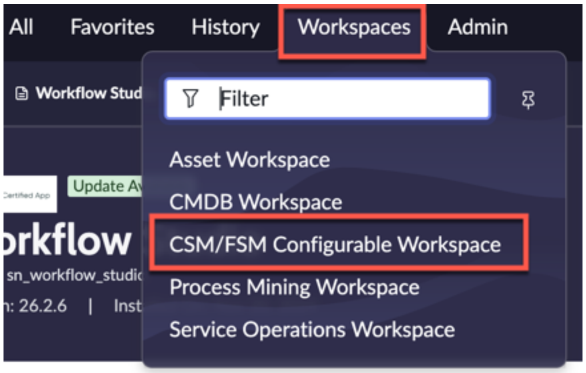


4. Click the link to edit the record.

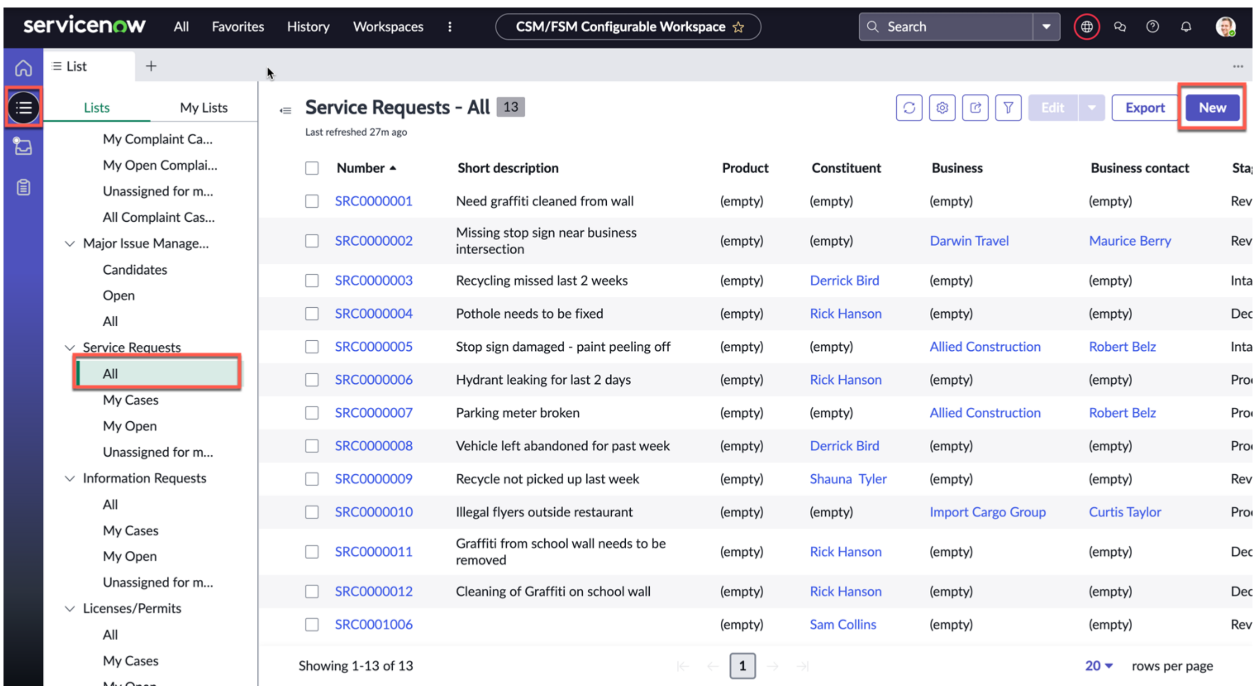


5. In the first column, change Process Definition to Gov Service Request Playbook. Then chose **Update** in the top right.

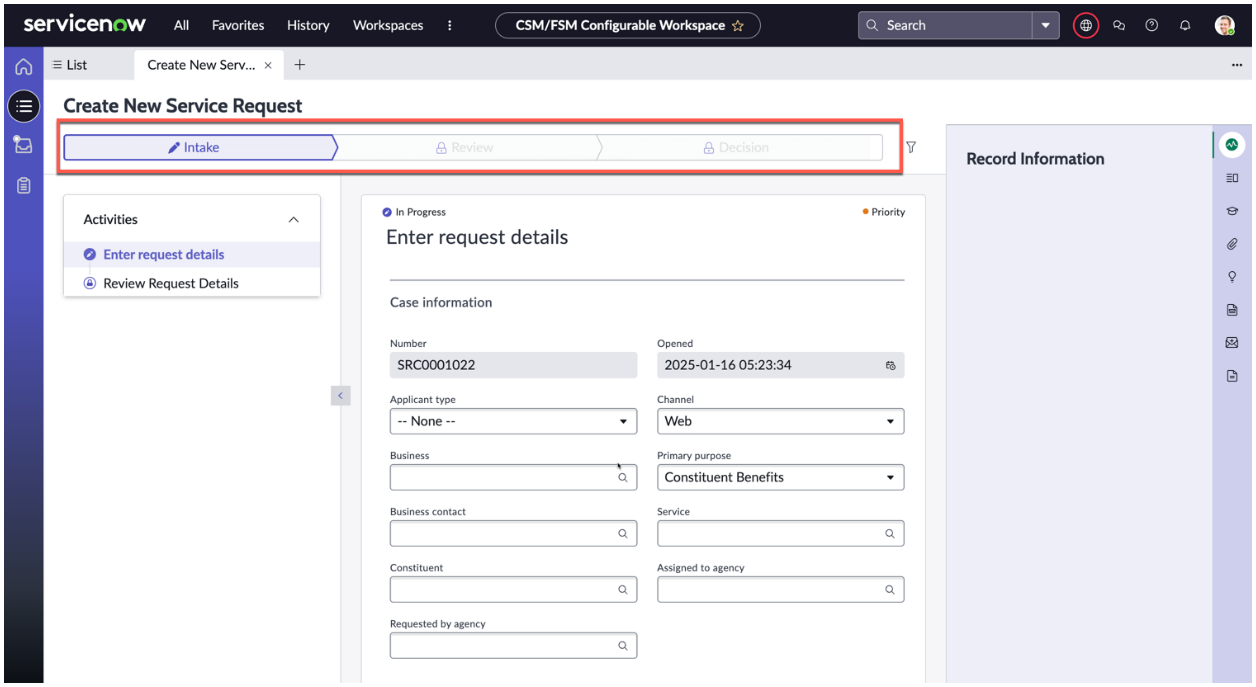
6. Click the **Workspaces** tab at the top, then **CSM / FSM Configurable Workspace**.



7. Click the List icon on the left vertical navigation bar, scroll in the List to locate **Service Requests** and click **All**. On the right side of the list, click **New**.

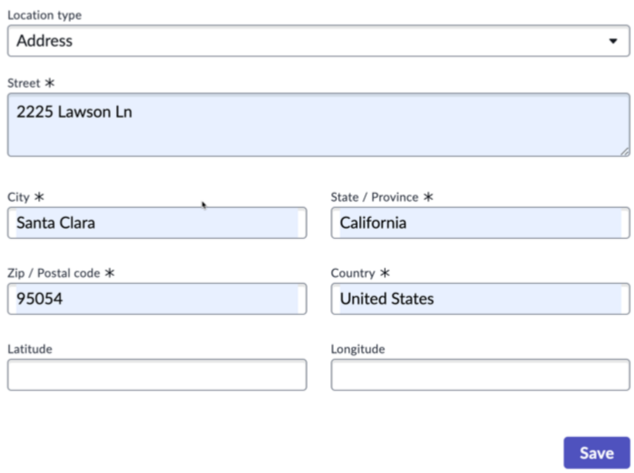


8. Notice the stages across reflect those configured in the **Gov Service Request Playbook** and not the four stages in the out of the box playbook. Also notice there's an additional activity that was never configured in the playbook. This is the **Record Generator** in action.

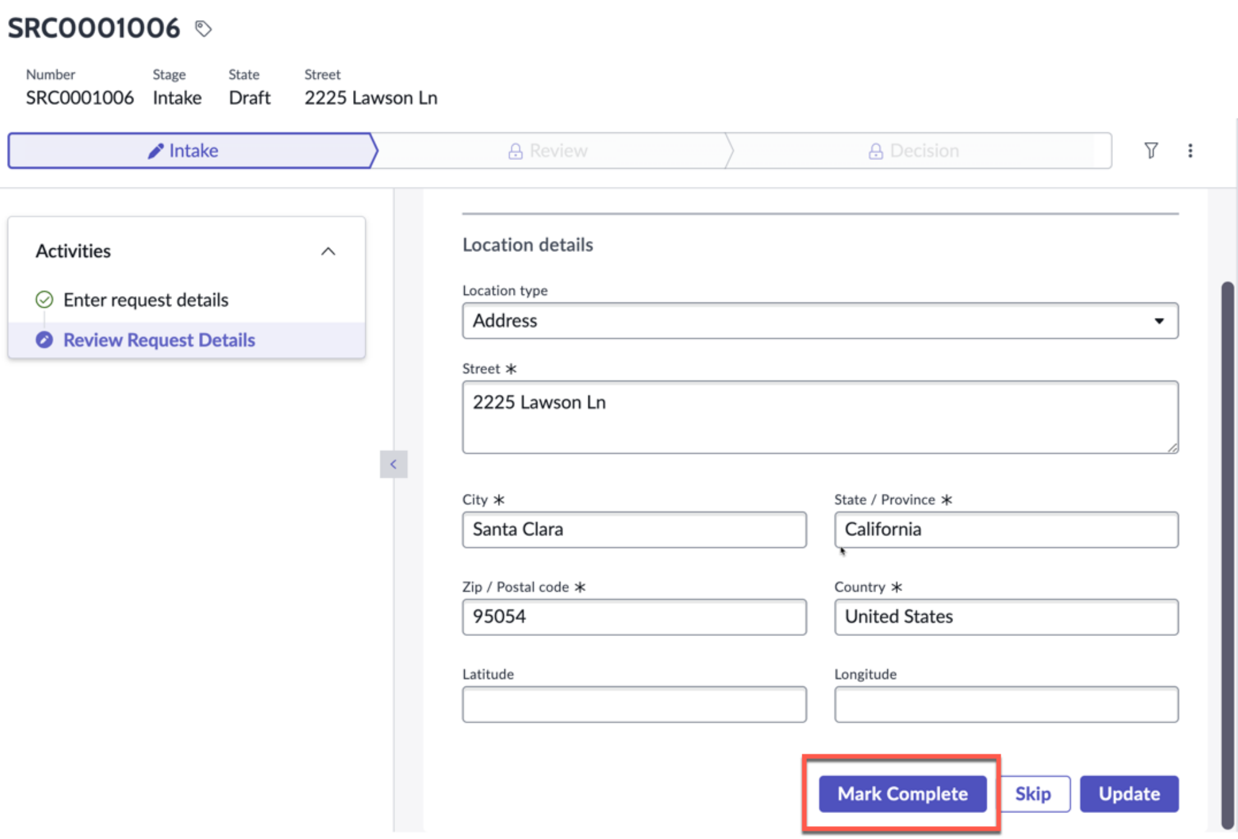


9. Populate the following fields on the form. Click **Save**.

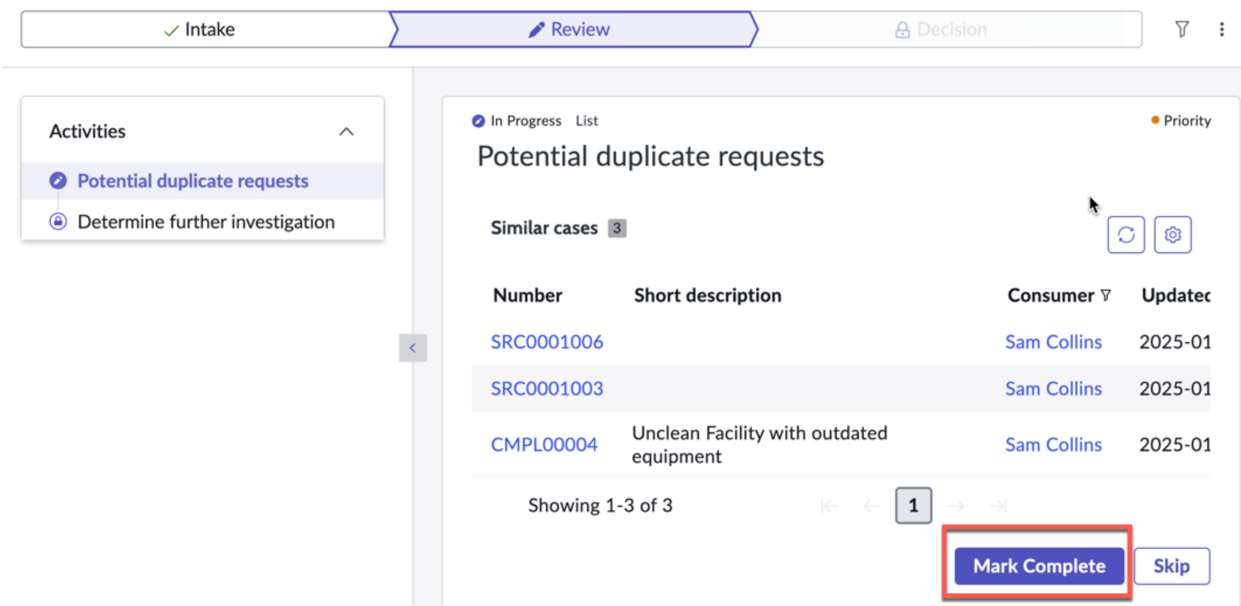
Constituent: Select **Sam Collins**
Street: **2225 Lawson Ln.**
City: **Santa Clara**
State/Province: **California**
Zip/Postal code: **95054**
Country: **United States**



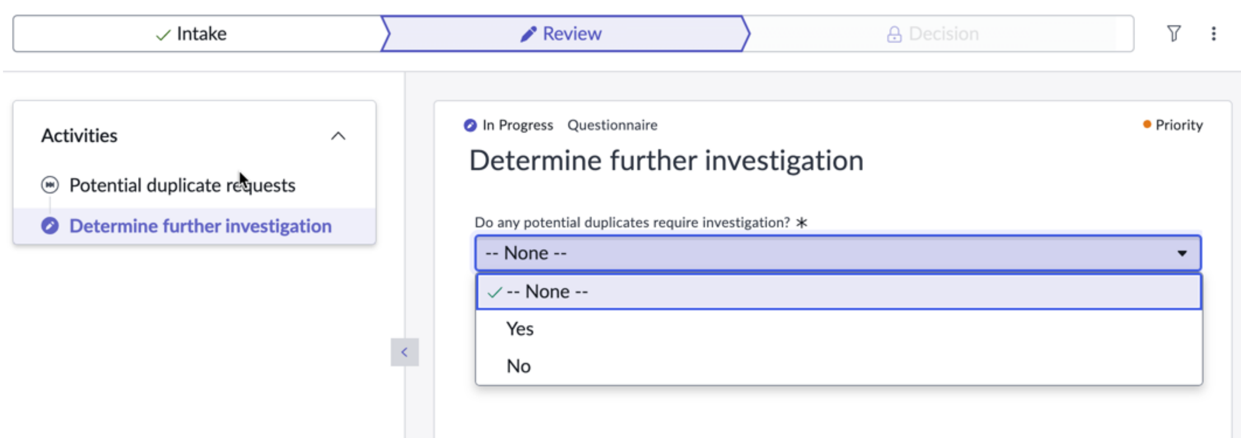
10. The playbook automatically advances to the next step in the stage. Scroll down in the center section and verify the information entered in the form. Click **Mark Complete**.



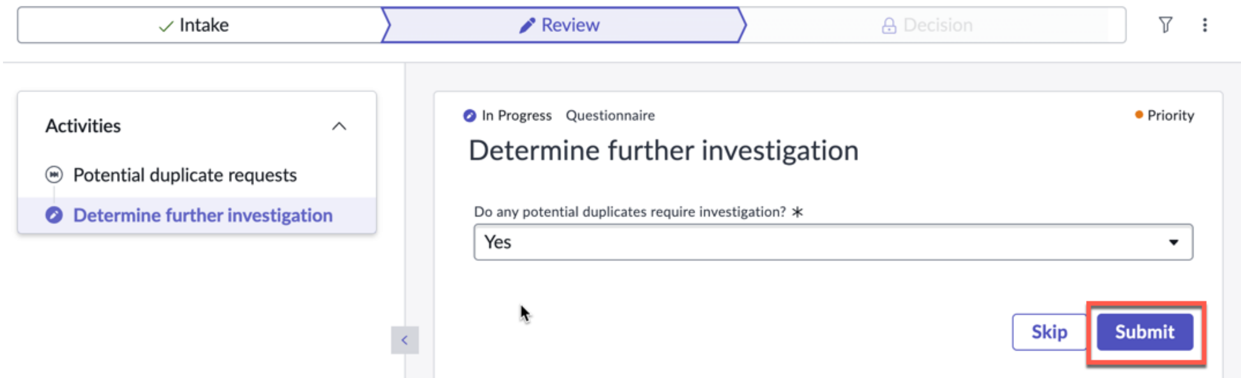
11. The playbook automatically moves to the **Review** stage and shows the **Potential duplicate requests** activity. Click **Mark Complete**.



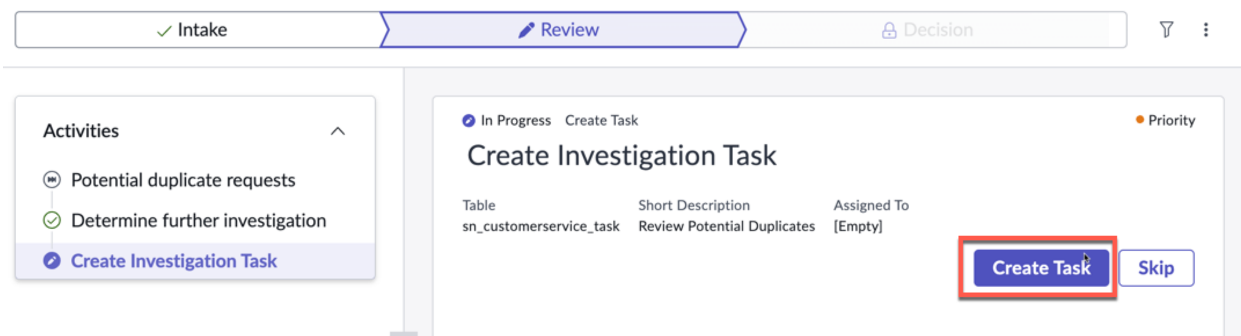
12. Now on the Determine further investation step, answer the question with **Yes**. Remember chosing yes, will create an additional step in the process.



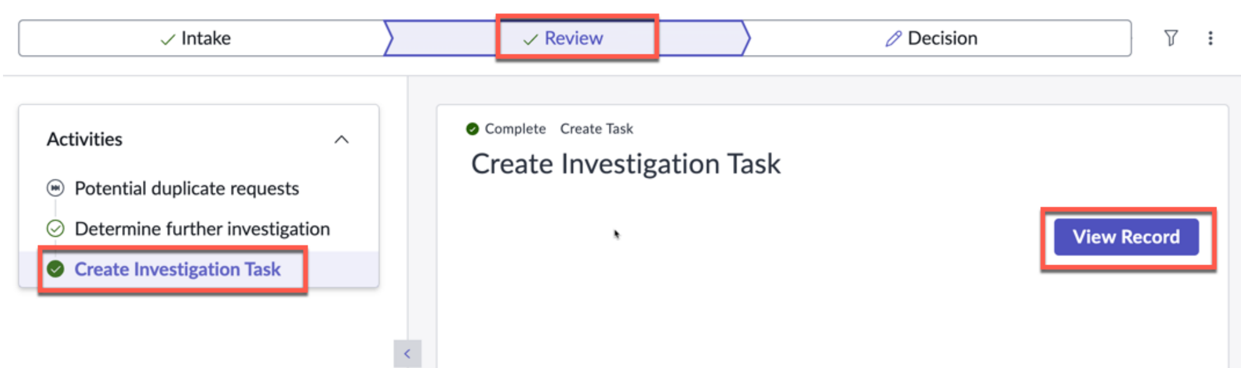
13. Chose **Submit**.



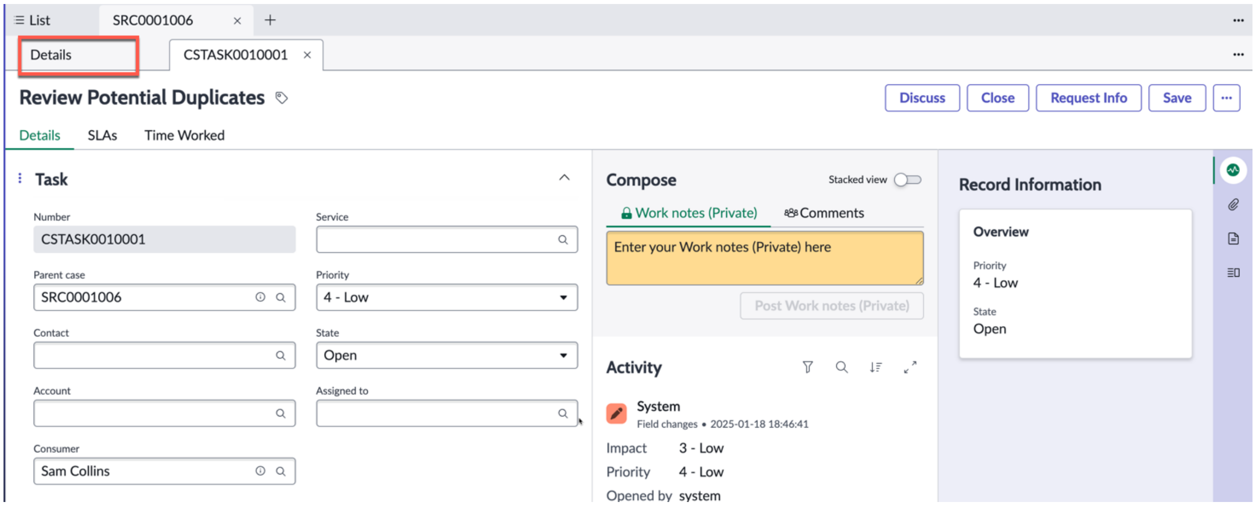
14. The task isn't yet created. Click **Create Task**. You could have configured the activity to automatically create the task but for lab purposes, this allows you to see the process.



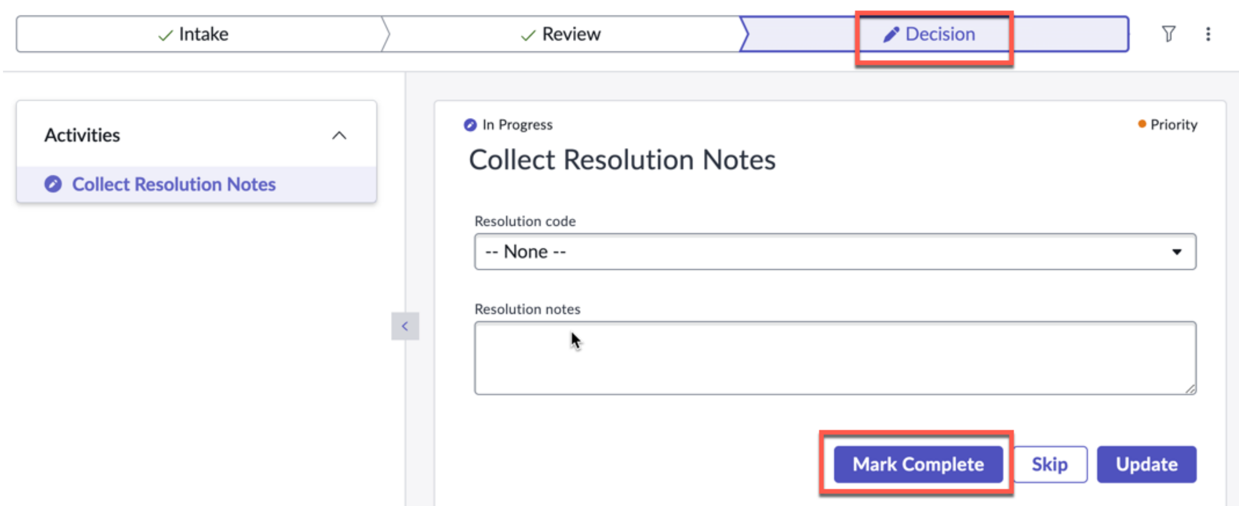
15. The process advances to the Decision stage. You can navigate back to **Review > Create Investigation Task**. Then click **View Record** to see the created task. Other configuration options include waiting for the task to complete before advancing and displaying task details in the playbook step.



16. Notice a new tab opens displaying the data from the created task. Navigate back to the **Details** tab.



17. Navigate to the **Decision** stage. You should be on the Collect Resolution Notes step. Populate the fields with anything you like. Click **Mark Complete**.



Congratulations! You have completed Lab 2.

Lab 3 (Bonus/Advanced) – Use of Additional Activities in Playbooks

Important Note: Lab 3 is included for reference. It originated from a previous learning lab but is still very useful for understanding advanced topics. It is not intented to align with the current lab.

Background / Purpose

To take advantage and leverage the power of playbooks, there are many activities you can use or even create your own personalized experience.

In this lab, users will learn how to configure some OOTB/custom activities and bring it into your demo story. This lab will include the following exercises:

1. Create an Automated Case Task.
   a. Case task to another team.
   b. Create a Work Order.
2. How to bring in a Guided decision into a Playbook.
3. Show a Table with a List view – A list of approvers.
4. Create a Checklist.

Note: the exercises below assume you are building in an existing process within Workflow Studio.

Lab 3, Exercise 1: Create an Automated Task

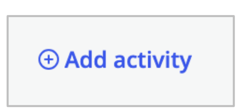
Automated tasks can be used in many ways. You will learn how to create an automated task for the following scenarios:

A. Automatically create a case task and assign it to another team for them to complete.

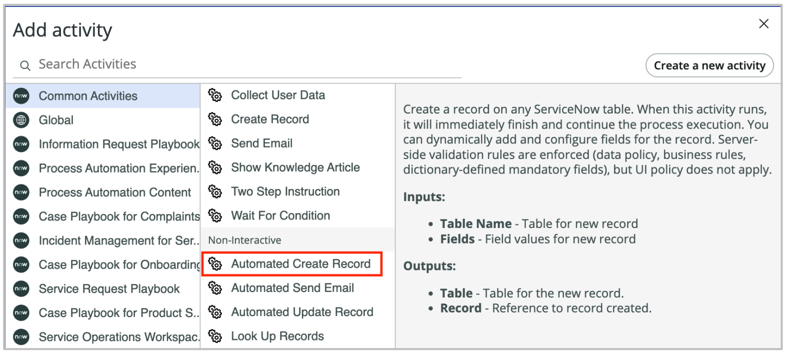
B. Create a Work Order.

A. Automatically create a case task and assign it to another team for them to complete.

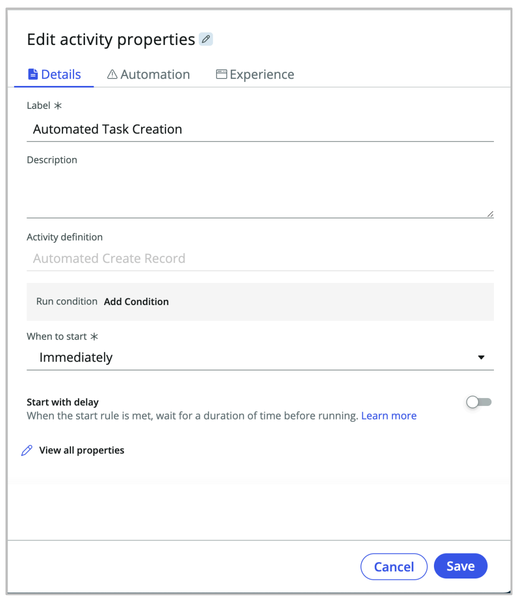
1. Navigate to **Workflow Studio** & open an existing process you have already created.
2. In the 1st lane or whichever lane you want your automated task to created, select the "**Add Activity**" link.



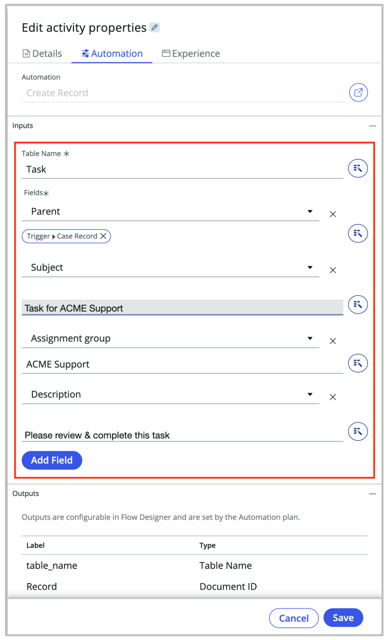
3. Search for the "**Automated Create Record**" under "**Common Activities**" and select it.



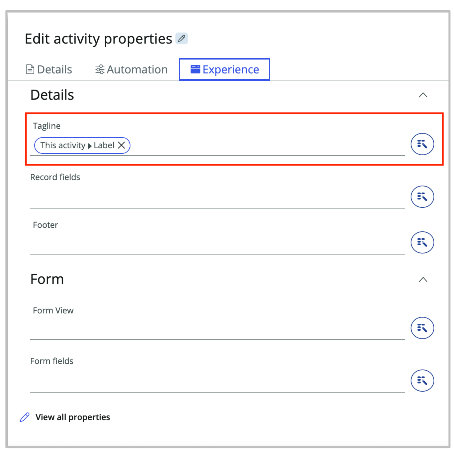
4. The Automated Create Record should be added to the **Lane.**
5. **Edit** the Activity by renaming the Label: **Automated Task Creation.**



6. Select the **Automation Tab**.
   i. Table Name : Task (sn_customerservice_task)
   ii. Select the **Add field** Button and add the following fields:
      1. **Parent** = (Trigger -> Case Record) using the pill picker
      2. **Subject** = Task for ACME Support
      3. **Assignment Group** = ACME Support
      4. **Description**: Please review and complete this task.

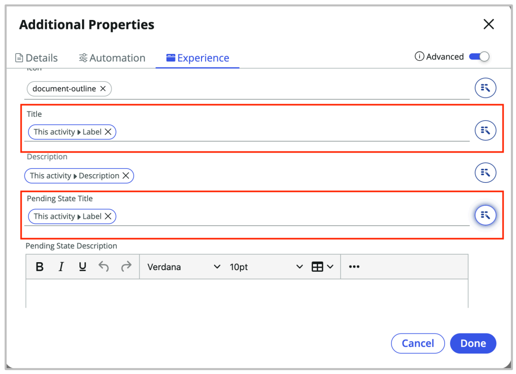


7. Select **Save**.
8. Select the **UI Layout** (image below from prior version).
9. **Delete the Tagline** and change the Tagline by using the Pill picker: This Acitivity -> **Label.** This will ensure the playbook view shows the label which is more meaningful rather than "Create Record".

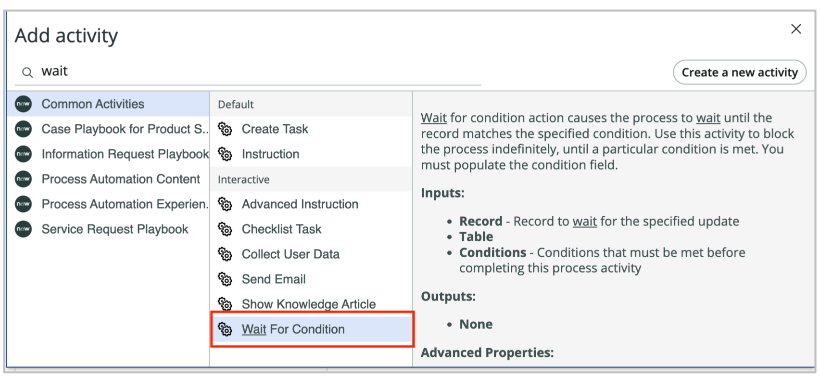


10. Select **View All Properties.**
11. Toggle the **Advanced button** in the top-right within the **Modal**. More fields should appear in the Modal.
12. **Remove the values** and replace them using the pill picker for the following fields:

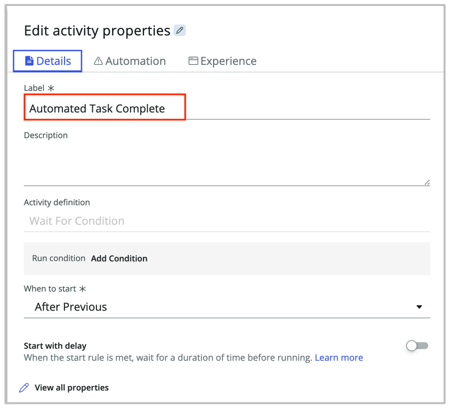
   i. Title : **This Activity → Label**
   ii. Pending State Title : **This Activity → Label**



13. Select **Done & Save Activity** (if not already done).
14. **Wait for Task Condition**: You will now create a new activity which will wait for the task to complete.
15. Select the **Add Activity link** and search for a "**Wait for Condition**" activity.

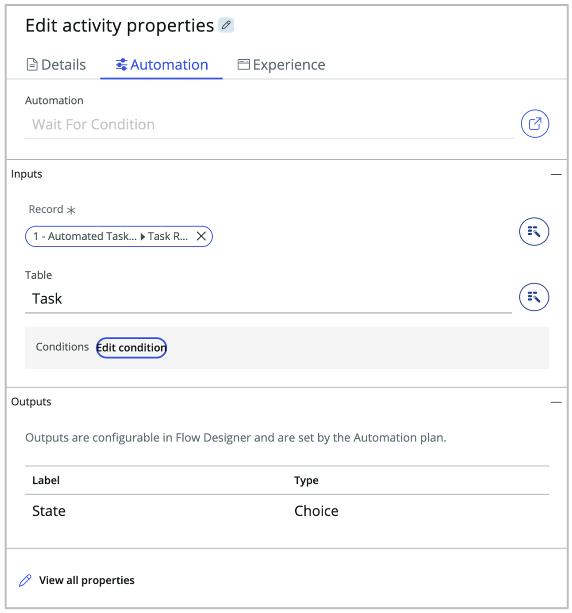


16. Change the Label: **Automated Task Complete**

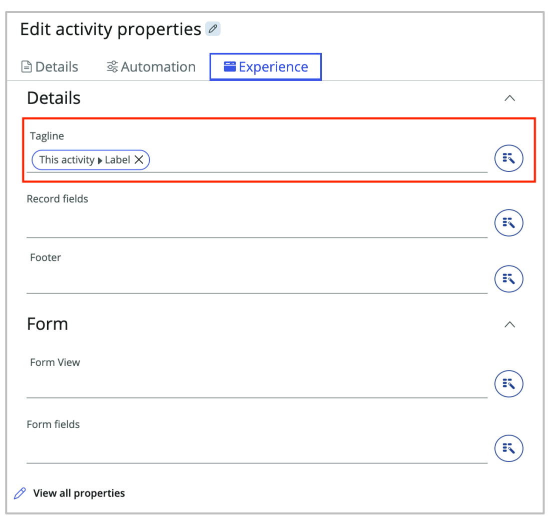


17. Select the **Automation** Tab.
18. Populate the following fields:
    i. Table: Task – sn_customerservice_task
    ii. Record: 1 – Automated task -> Task Record **(Using the Pill Picker).**
    iii. Table field should automatically be populated.
19. Select **Add Condition**. This is where you want to add the condition when the case task is action and closed to show the task is complete.

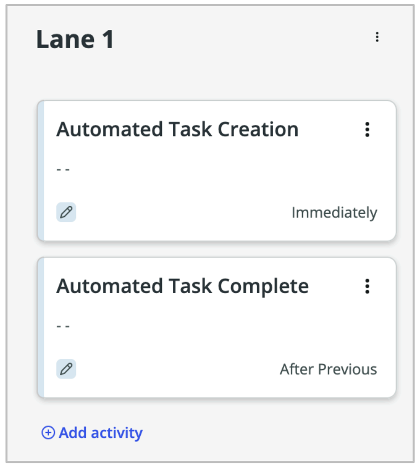
    i. State is Closed.
20. Select **Modify.**
21. Automation Tab below:



22. Select the **Experience Tab**.
23. **Delete the Tagline & change the Tagline** by using the Pill picker: This Activity -> Label. This will ensure the playbook view shows the label which is more meaningful rather than "Wait for record".



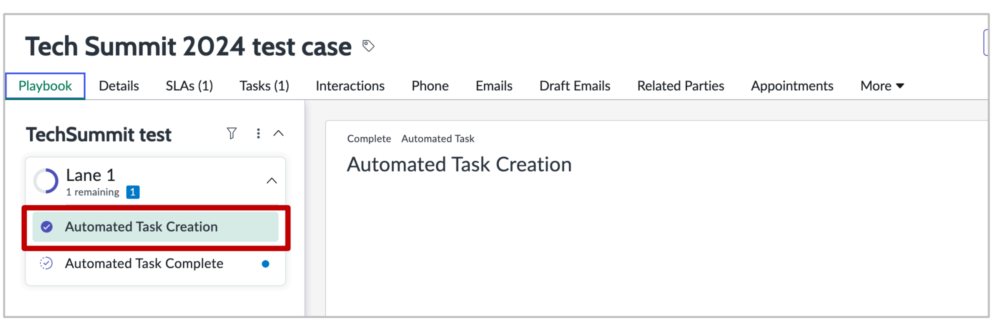
24. Your playbook activities should now look like the diagram below:



25. **Select the Activate button** to activate the playbook.
26. Time to Test the playbook is working by **creating a case** based on your process definition / trigger.

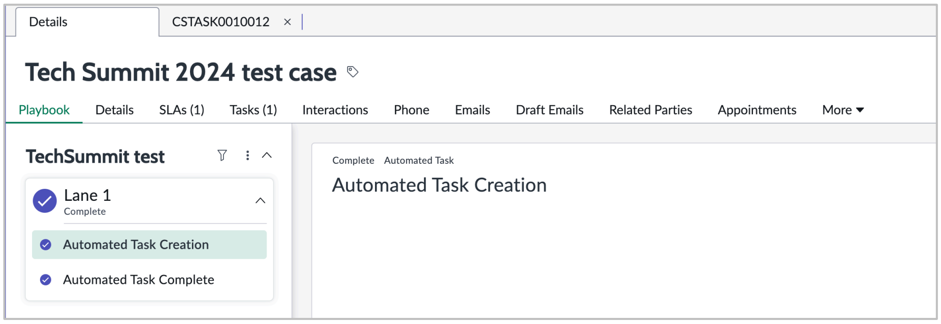
Lab Results

1. Create a case based on the process trigger. You should see the following outcomes:
    i. Playbook is assigned to your case.
    ii. Automated Task Creation should have a tick on the activity.
    iii. Select the **Tasks Related List** tab. A task should be created. You can go check what the values are based on what values were set in the activity.
    iv. Automated Task Complete activity is the next step which is waiting for the previous task to complete.



2. Open the **automated case task**.
3. Add some **additional comments** and set the state to **Closed**. Select **Save**.

4. Navigate back to the **playbook tab** within the case. You should now see "**Automated Task Complete**" with a tick box to say the task is complete.



Congratulations, you have created "Automated Create Record" & "Wait for condition" activities which can be used in many different use cases!

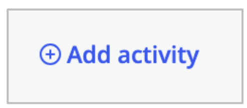
B. Create a Work Order | FSM REQUIRED

To create a work order from the playbook the same activities need to be used: Automated Create Record & Wait for Condition, however this time you create a record in the **Work Order (wm_order) table** instead and populate the relevant fields.

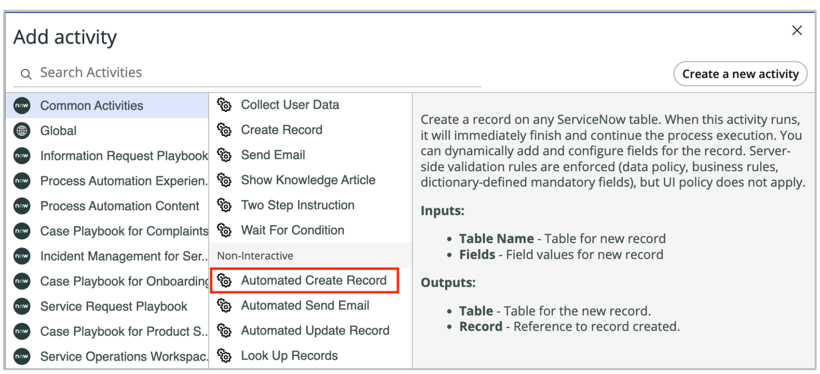
This is a great way to bring CSM, Playbooks and FSM together. Examples are:

- Grant application coming in via CSM from a farmer where an officer needs to carry out a site inspection.
- Customer's broadband router not connecting to the internet and an engineer needs to be sent out.
- Clinician raising a request for a patient to have a blood test in a Virtual Care environment. Clinician needs to visit the patient at home to take the blood test.

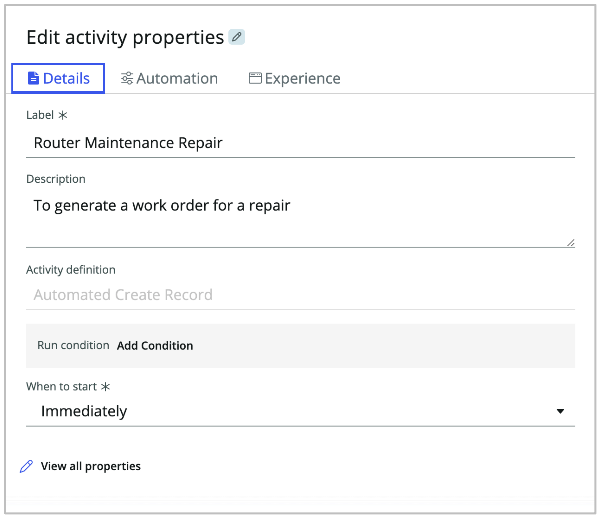
1. Navigate to **Process Automated Designer** & open an existing process you have already created.
2. In the 1st lane or whichever lane you want your automated task to created, select the "**Add Activity**" link.



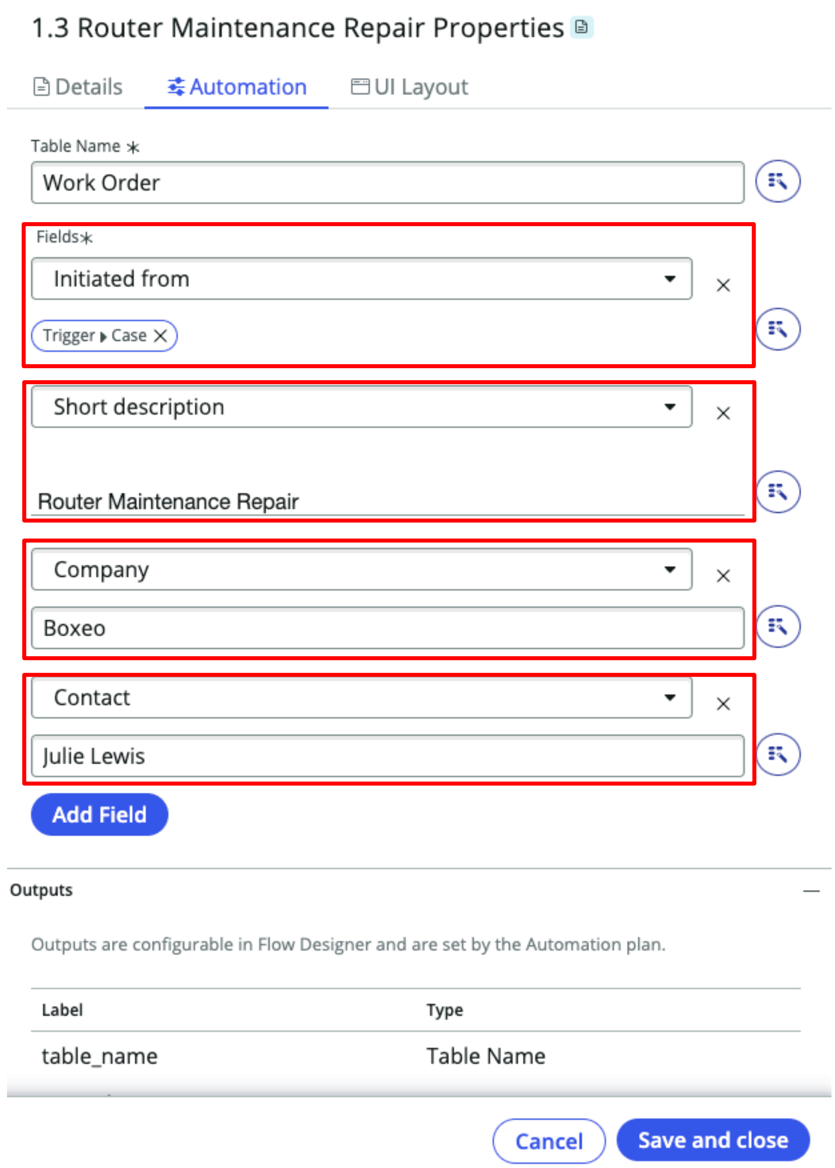
3. Search for the "**Automated Create Record**" under "Common Activities" and **select it**.



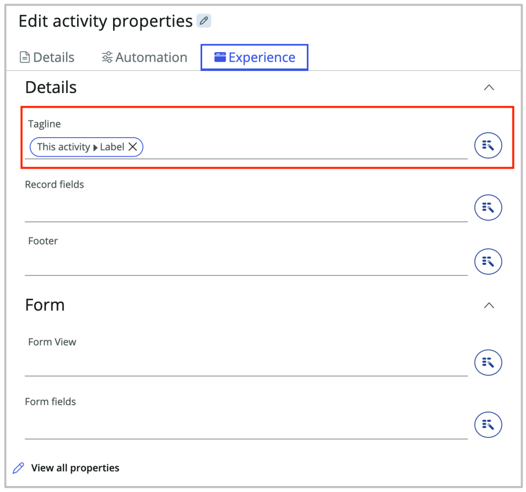
4. The Automated Create Record should be **added** to the Lane.
5. **Edit the Activity** by renaming the Label: **Router Maintenance Repair**.



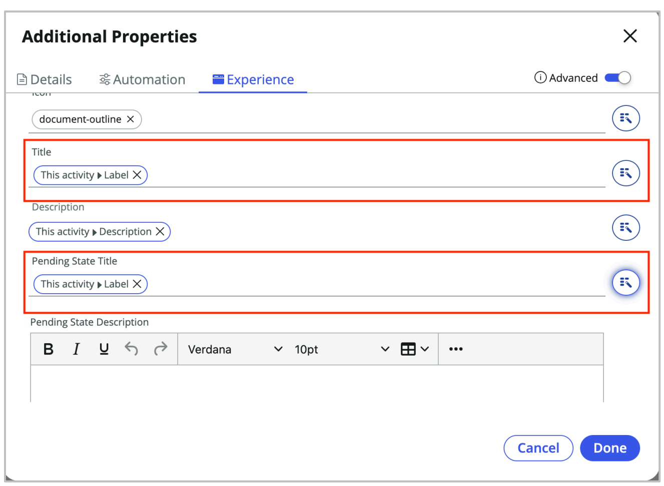
6. Select the Automation Tab.
    i. Table Name : **Work Order (wm_order)**
    ii. Select the **Add field Button** and add the following fields:
        1. Initiated from = (Trigger -> Case Record) using the **pill picker**
        2. Short Description, type in = **Router Maintenance Repair**
        3. Company: **BOXEO**
        4. Contact: **Julie Lewis**
        5. Select **Save**.
        6. The above fields are a minimum, but in your use case, you may need to populate more fields.



7. Select the **Experience Tab**.
8. **Delete the Tagline** & change the Tagline by using the Pill picker: This Activity -> **Label**. This will ensure the playbook view shows the label which is more meaningful rather than "Create Record".

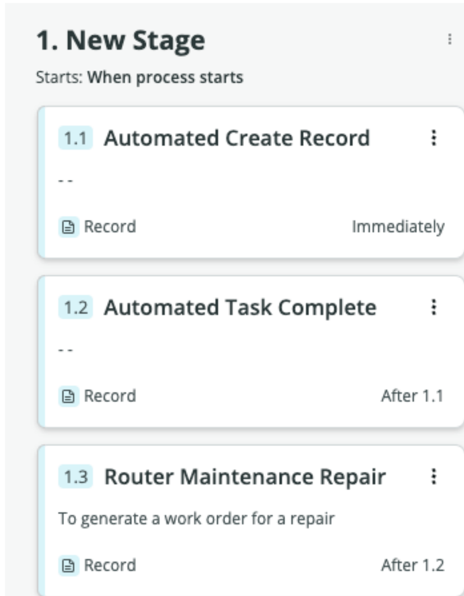


9. Select **View All Properties**.
10. Toggle the **Advanced button** in the top right within the **Modal.** More fields should appear in the Modal.
11. Remove the **values** and replace them using the pill picker for the following fields:
    - **i.** Title : **This Activity → Label**
    - **ii.** Pending State Title : **This Activity → Label**



12. Select **Done** and **Save Activity** (if not already done).

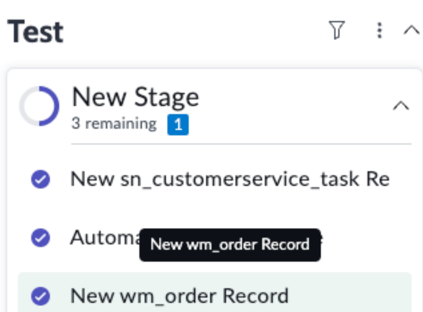
13. Your playbook activities should now look like the diagram below:



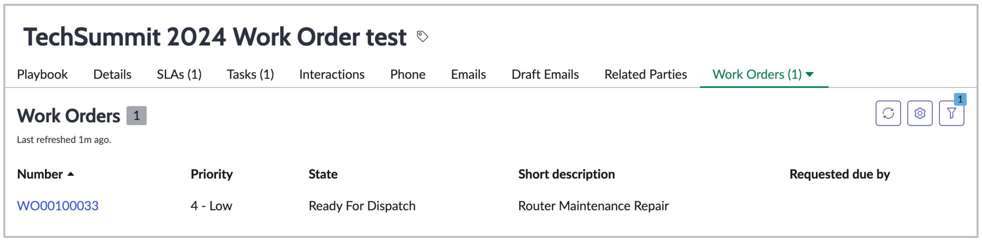
14. Select the **Activate button** to activate the playbook.
15. Time to Test the playbook is working by creating a case based on your process definition / trigger.

Lab Results

1. Create a case based on the process trigger. You should see the following outcomes:
   i. Playbook is assigned to your case.
   ii. Router Maintenance should have a tick on the activity – this means the Work order has been automatically created.



   iii. Select the **Related List tab** and find **Work Orders**. A Work Order should be created.



iv. Router Maintenance Complete activity is the next step which is waiting for the previous task to complete – i.e. when the work order is closed complete.

Congratulations, you have automatically created a Work Order from a playbook!

Lab 3, Exercise 2: Guided Decisions & Recommended Actions

Guided decision guides customer service agents through a troubleshooting process based on the context of the case they are working on. It asks them questions based on previous answers and gives guidance on the next step they to take in the resolution process.

Using Guided Decisions has the following benefits:

- Improve first contact resolution: Dynamically guide customer service agents along the optimal path to resolve complex cases.
- Shift to digital faster: Author decision trees and guide customer service agents to take the next optimal action.
- Improve customer service agent productivity: Surface contextual recommendations in the CSM workspace.

Guided decisions consist of decision trees. A decision tree is a multi-step process consisting of a series of questions, answers, and guidance.

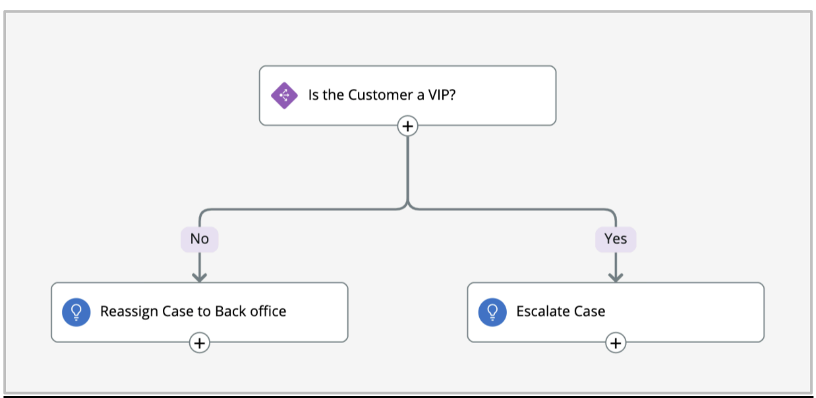
This lab will be broken down into three parts:

A. Enable Special Handling Notes for Account BOXEO EMEA.

B. Create the Decision Tree.

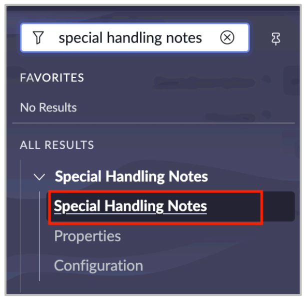
C. Link the Guided Decision Tree (decision tree & guidance) to the Playbook.

You will build the following Guided Decision:

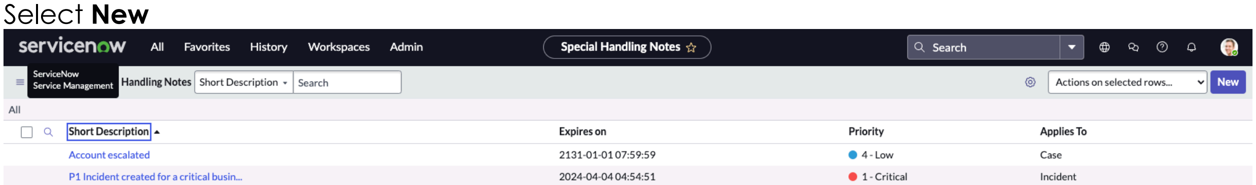


PART A – Enable Special Handling Notes

1. Navigate to **Special Handling Notes**.

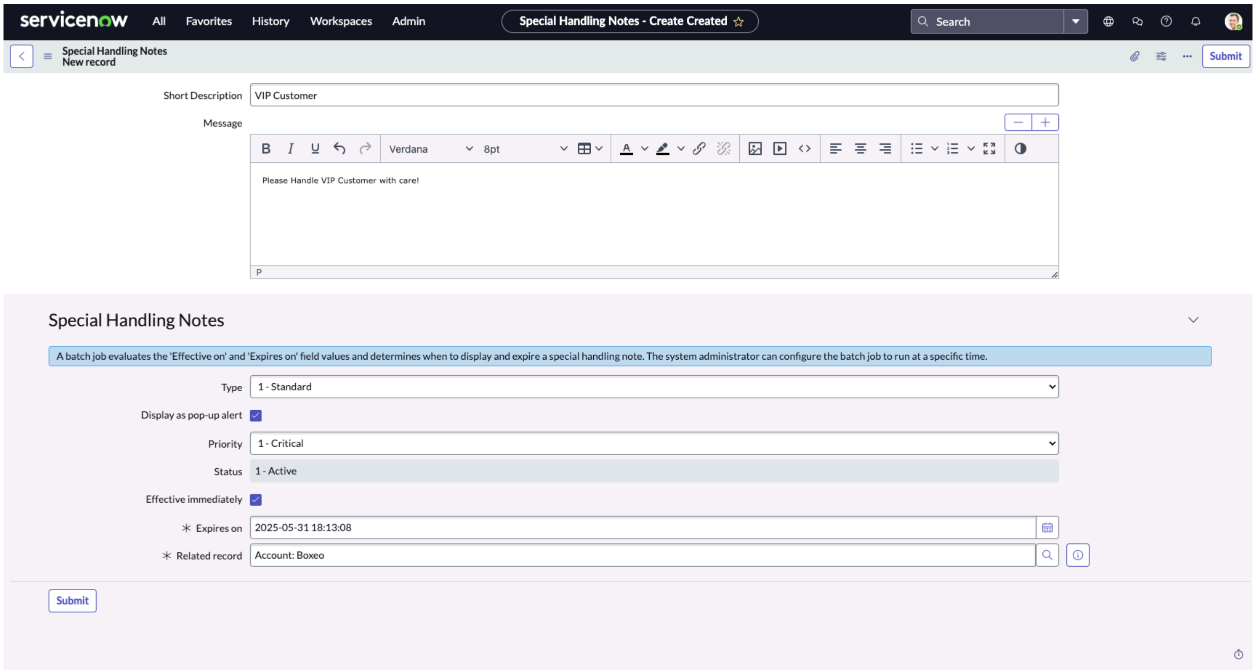


2. Select **New**



3. **Update the following fields:**
   Short **Description: VIP Customer**
   Message: **Please Handle VIP Customer with Care!**
   Display Pop Up Alert: **check the box**
   Priority: **Select 1- Critical**
   Expires On: **2025-05-3118:00:00**
   Related Record: **Account** "**BOXEO**".

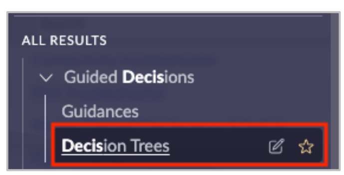
   Click Submit



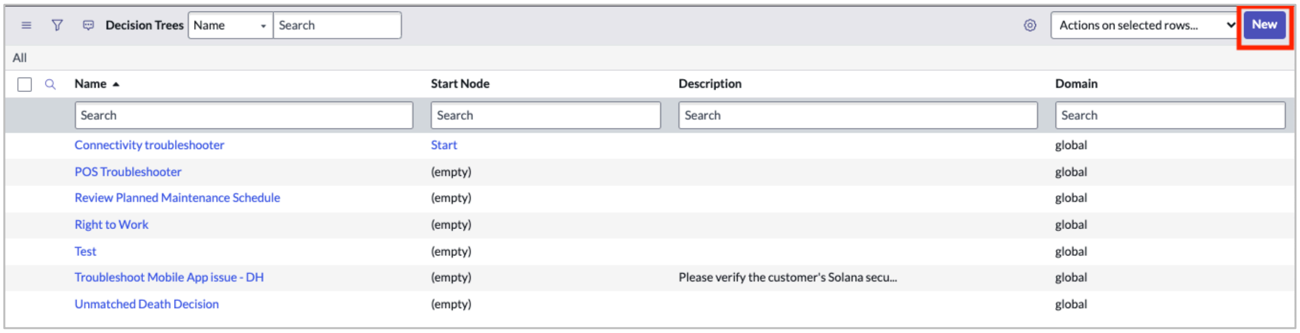
4. Special handling notes will pop during the Lab Result when creating a case for any Boxeo related customer.

PART B – Create the Decision Tree

1. Navigate to Guided Decisions → **Decision Trees**.



2. You will see a list of all the existing decision trees. Select the **New** button.



3. Create a new Decision tree record:

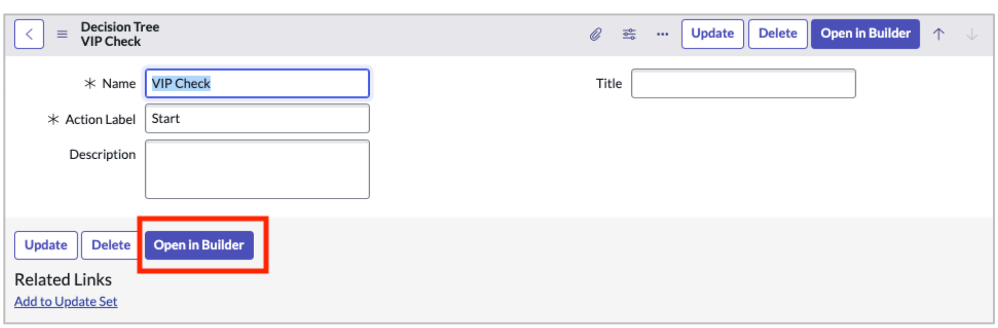
    a. Name: **VIP Check**

    b. Action Label: **Start**

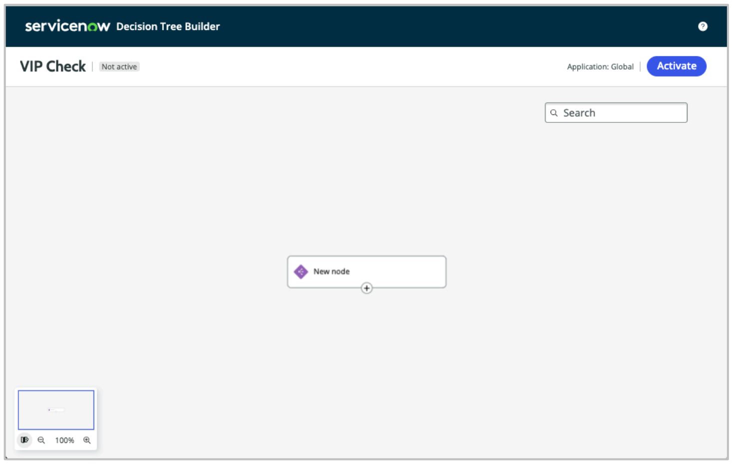
    c. Select Submit.

4. You will be returned to the list of Decision Tree records. Select the record you just created '**VIP Check**'.

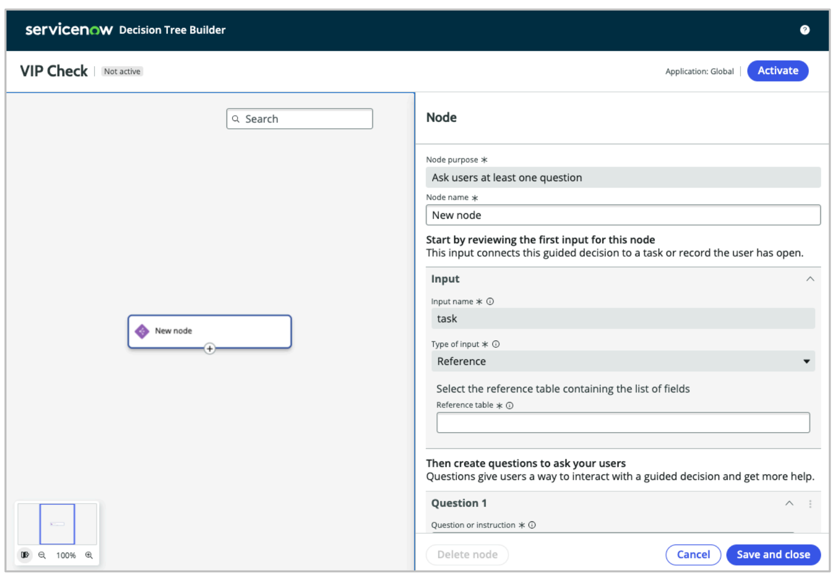
5. Now select the **Open in UI Builder** button.



6. This will open the Decision Tree Builder in a new tab.



7. Select the "**New node**" within the explorer view and the configuration settings should now appear on the right side of the screen.

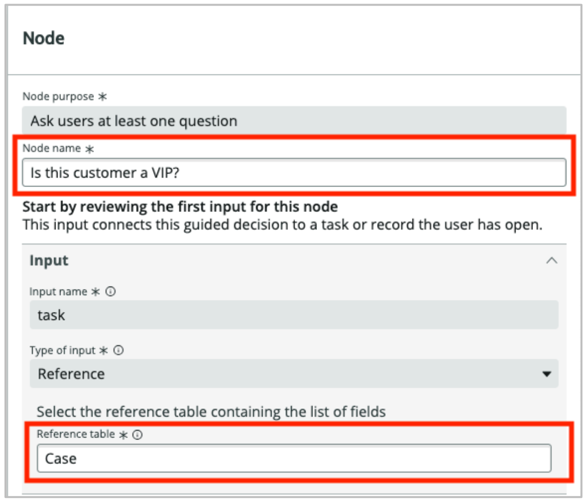


8. You are now going to create a **question node** called: "**Is this customer a VIP?"**, with two options where the answer is **Yes or No**.

9. Populate the following Node fields:

    a. Node name: **Is this customer a VIP?**

    b. Reference Table: **Case** (sn_customerservice_case)



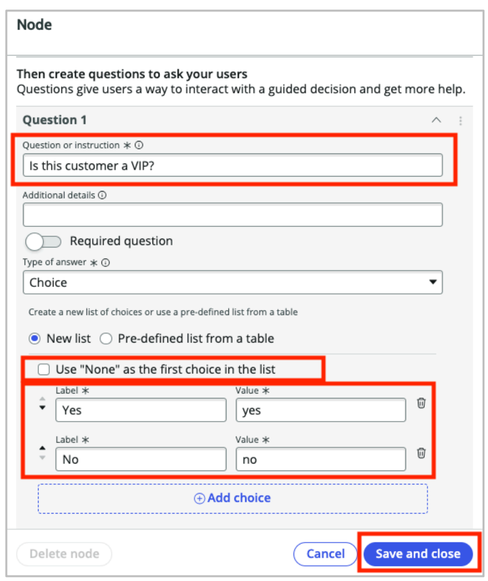
10. Scroll down and populate the following question fields:

    a. Question or instruction: **Is this customer a VIP?**

    b. Deselect the flag: Use **"None"** as the first choice in the list.

    c. 1st Label : Yes with value **"yes".**

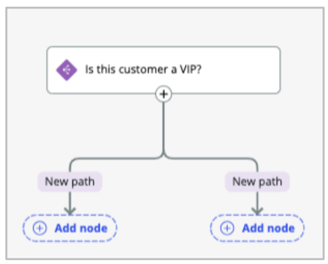
    d. 2nd Label: No with value **"no".**



11. Select the **Save and Close** button. You're Node should now look like the image below:

12. You will now create two branches for what happens when a user select Yes or No for this question. To do this, select on the **+** on the Is this customer a VIP? Node **TWICE**. See below.

13. You will now have **two new** branches created.



14. Select the 1st New Path on the left to configure the branch.

    a. Path name: **No**

    b. Path Priority: **100**

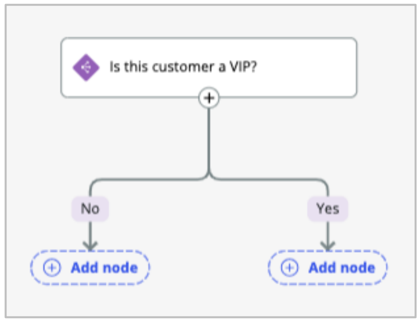
    c. Define the condition for showing the next node: Is this customer a VIP is **No**

15. Select the **Save and Close** button.

16. Repeat the same steps for the 2nd right-hand side node, but this time it needs to be configured for the answer **Yes**.

17. **Select Save** and Close button.

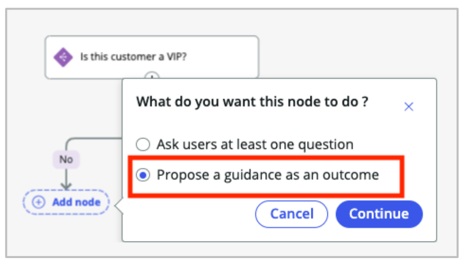
18. You have now configured the **two** branches.



19. The next step is to **add the guidance** for each of the two nodes.

20. Select "**Add Node**" for the branch "**No**".

21. Select "**Propose a guidance as an outcome**" and select the **Continue** button.



22. A Node window will appear on the right. Populate the following fields:

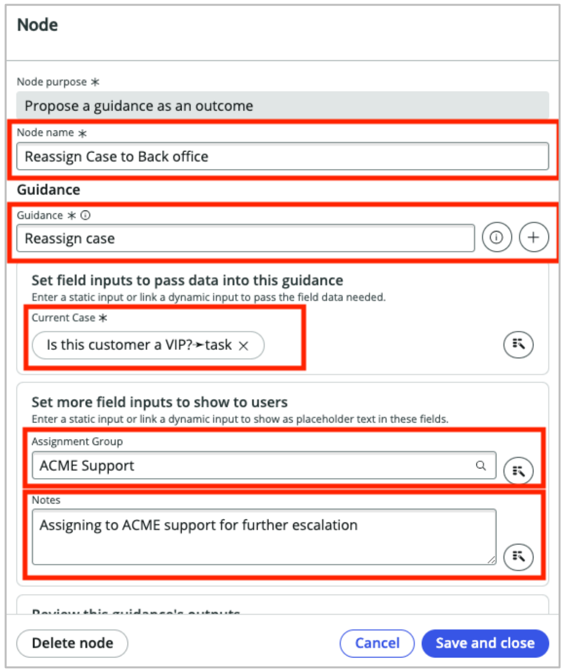
    a. Node name: **Reassign Case to Back Office**

    b. Guidance: **Reassign case**

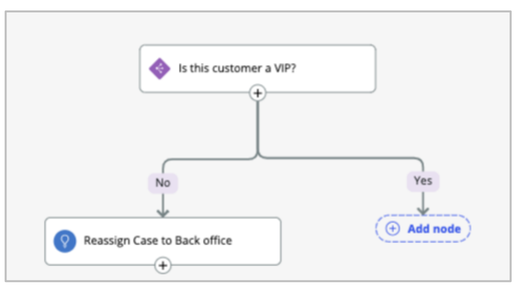
    c. Current Case: **(Is the Customer a VIP> → task)** using the pill picker

    d. Assignment Group: **ACME Support**

    e. Notes: **Assigning to ACME support for further escalation.**

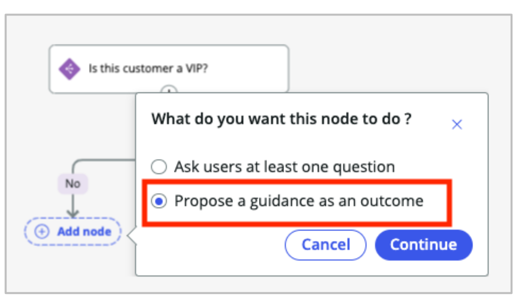


23. Select **Save and close** button. Your Decision tree should now look like the image below.



24. Select "**Add Node**" for the branch "**Yes**"

25. Select "**Propose a guidance as an outcome**" and select the **Continue** button.



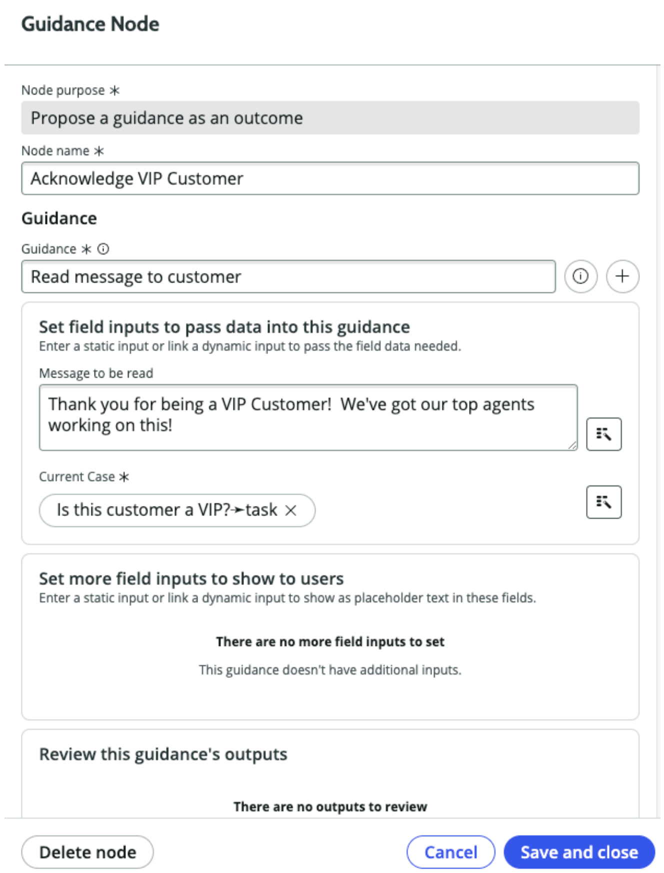
26. A **Node window** will appear on the right. Populate the following fields:

a. Node Name: **Acknowledge VIP Customer**

b. Guidance: **Read message to customer**

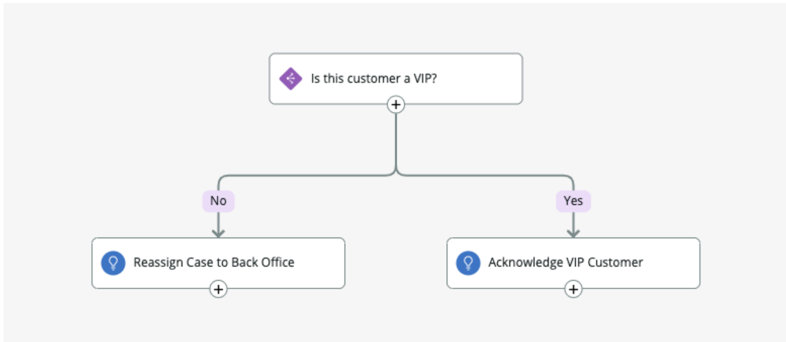
c. Message to be read: **Thank you for being a VIP Customer! We've got our top agents working on this!**

d. Use the pill picker on the **Current Case*** field to select: *Is this customer a VIP? -> task*



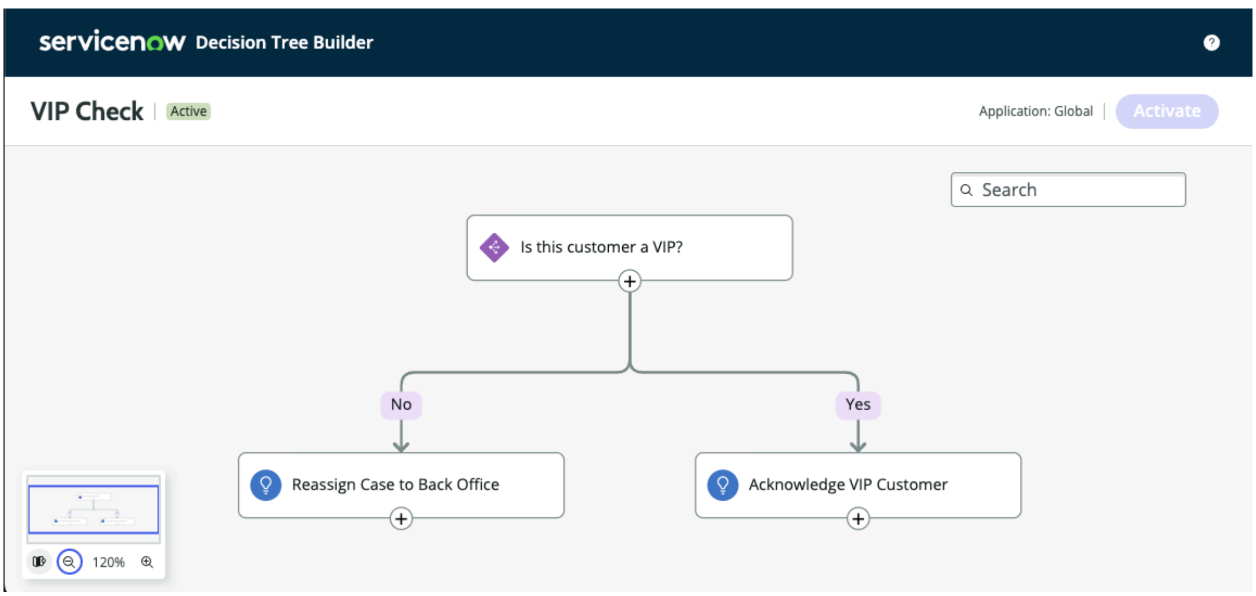
27. Select **Save and Close** button.

28. Your Decision tree should now look like the image below:



29. Select the **Activate** button at the top-right corner followed by the **Activate now** button which will pop up in the modal.

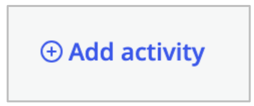
30. The activation will check for completeness, or any errors made within the decision and highlight them to you. If all is ok, you will receive a message stating "Your guided decision is now active". Select the **close** button.



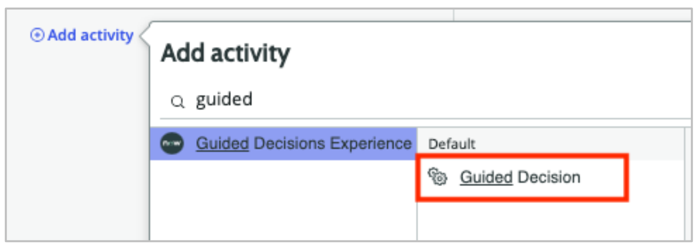
31. The decision tree configuration is now **complete**. The next step is to present the decision tree within a playbook in the next part.

PART C – Link the Guided Decision to a Playbook

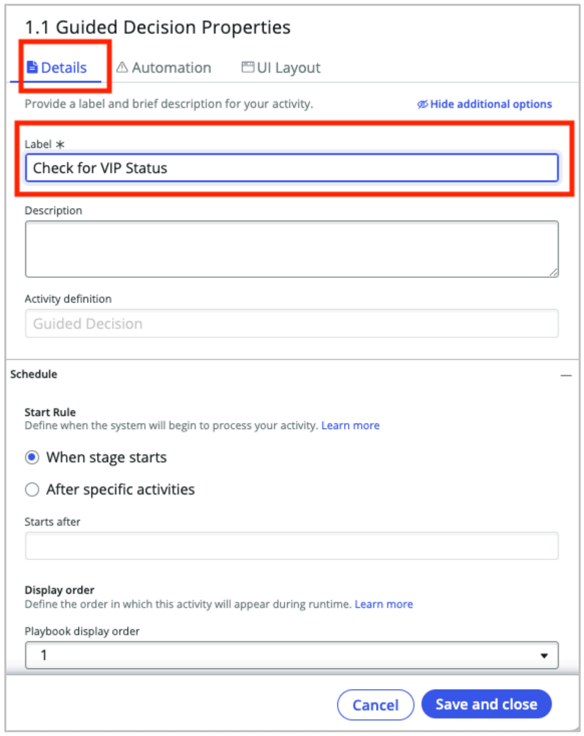
1. Navigate to **Process Automated Designer** and open an existing process you have already created.
2. In the 1st lane or whichever lane you want your automated task to created, select the "**Add Activity**" link.



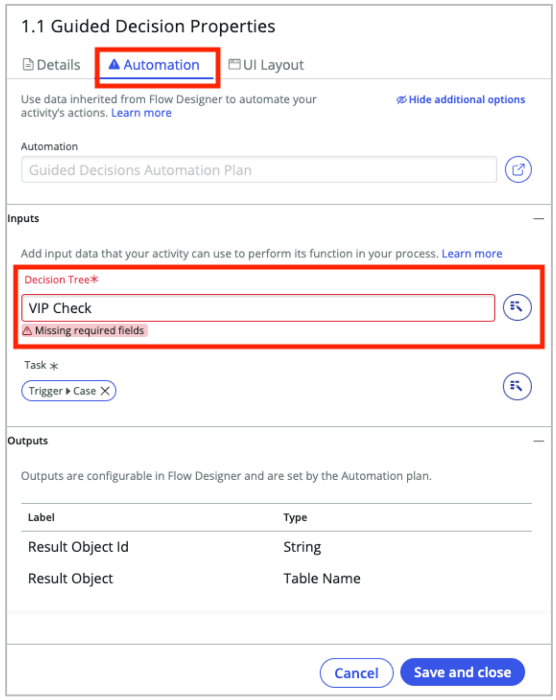
3. Search for the "**Guided Decision**" under "Common Activities" and select it.



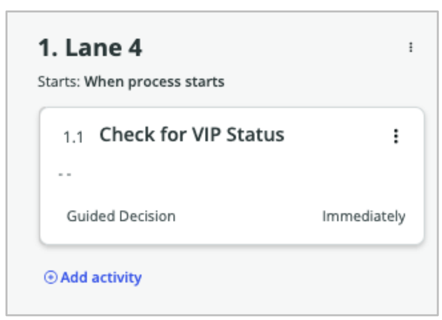
4. In the details tab Change the Label to: **Check for VIP Status.**



5. Select the **Automation Tab** and populate the Decision Tree field with the decision tree you have just created called "**VIP Check**".



6. Select **Save and close**.
7. Activate the Process by clicking on the **Activate** button.
8. You Activity should now look like the image below.



9. Time to Test the playbook is working by creating a case based on your process definition / trigger.

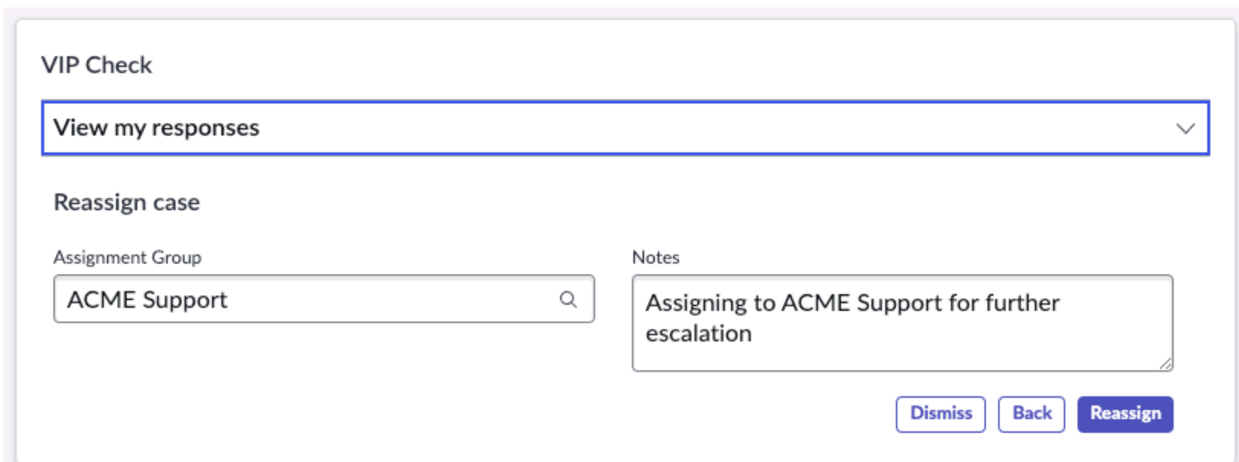
Lab Results

1. Create a case based on your process trigger and make sure the contact is Michelle Semmler. You should see the following outcomes:
    a. Playbook is assigned to your case.
    b. Special Handling Notes will pop up stating this is a VIP customer.

c. You should now have the following view with the Playbook showing your Check VIP Guided decision.

d. Select the option for **No** and click on the **Next** button.

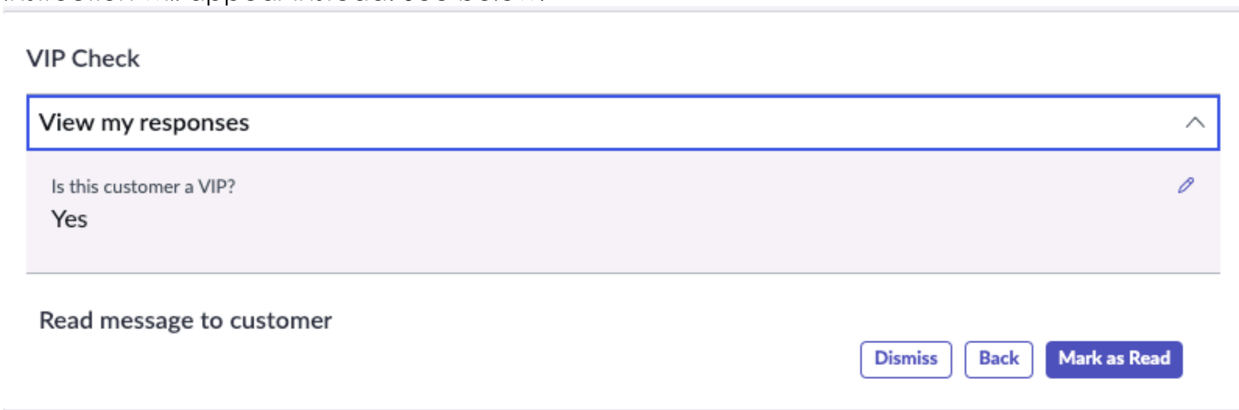
e. The Guided decision then asks you to reassign the case.



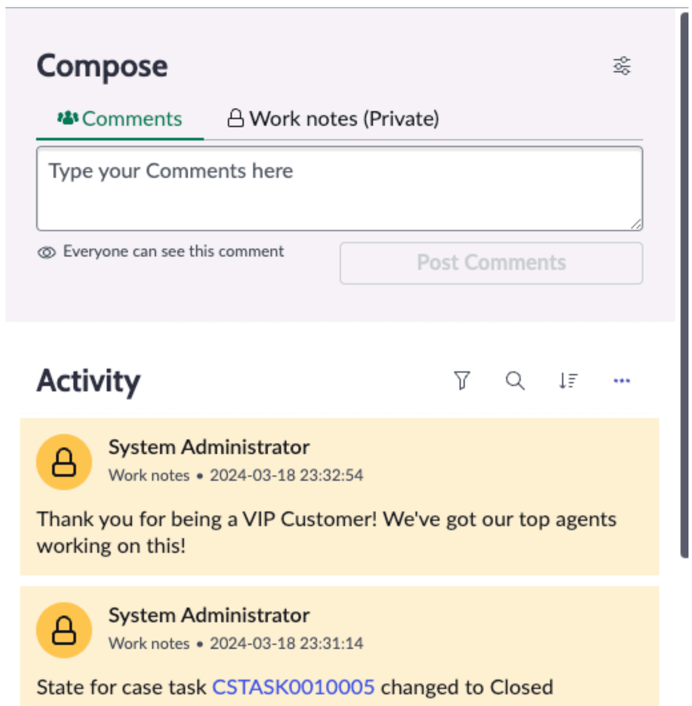
f. At this point you can click the **Reassign** button or **change the Assignment group** to another group and amend the notes.

g. This completes one branch of the Lab result.

2. Repeat the above steps an create another test case, but this time select **Yes** and an Instruction will appear instead. See below.



3. Click the **Mark As Read** button
4. Now navigate to the **Details** tab to see the message in the Activity Stream of the case.

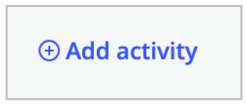


Congratulations, you have created a guided decision as part of a playbook!

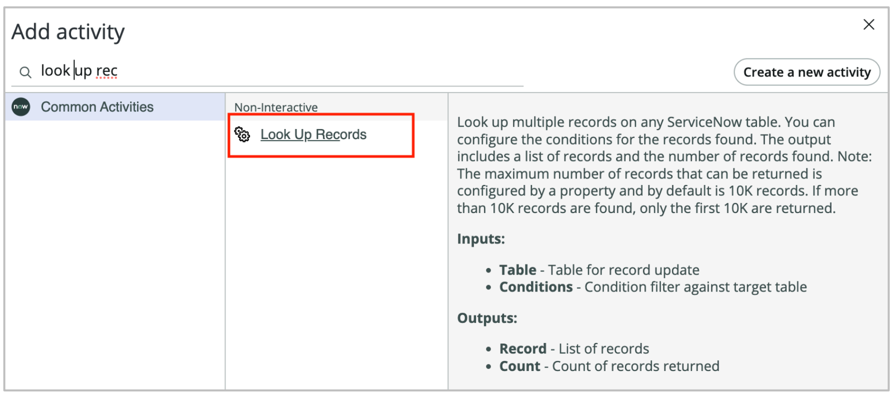
Lab 3, Exercise 3: Table List View

Table list views can be used to show many different types of data, however in this lab you're going to see a list of approvers required.

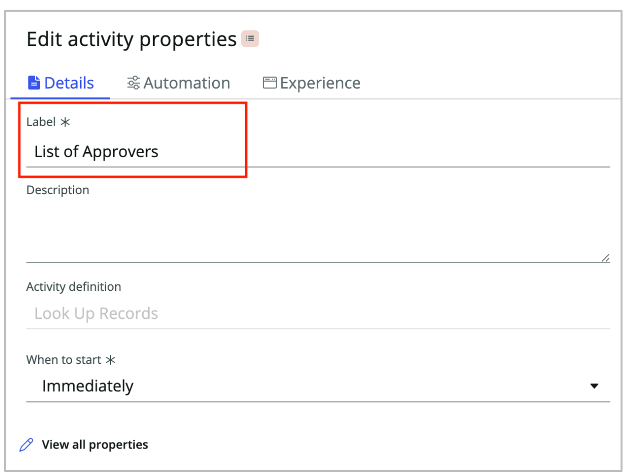
1. Navigate to Process Automated Designer & open an existing process you have already created.
2. In the 1st lane or whichever lane you want your automated task to created, click on the "Add Activity" link.



3. Search for the "**Lookup Records**" under "Common Activities" and select it.



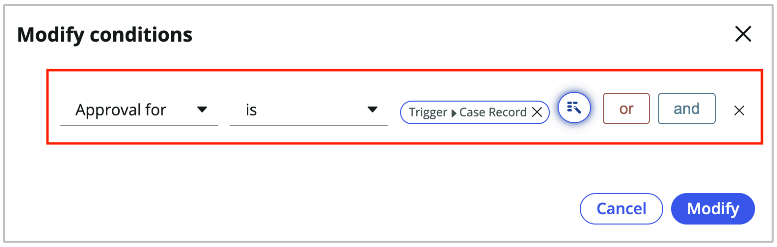
4. Change the Label: **List of Approvers**.



5. Move to the **Automation tab** and populate the following fields:
    a. Table = **Approval** (sysapproval_approver)
6. Select **Add Condition** and enter the following:

a. Approval For = **[Trigger → Case Record]** using the pill picker.

b. Select **Modify** button.



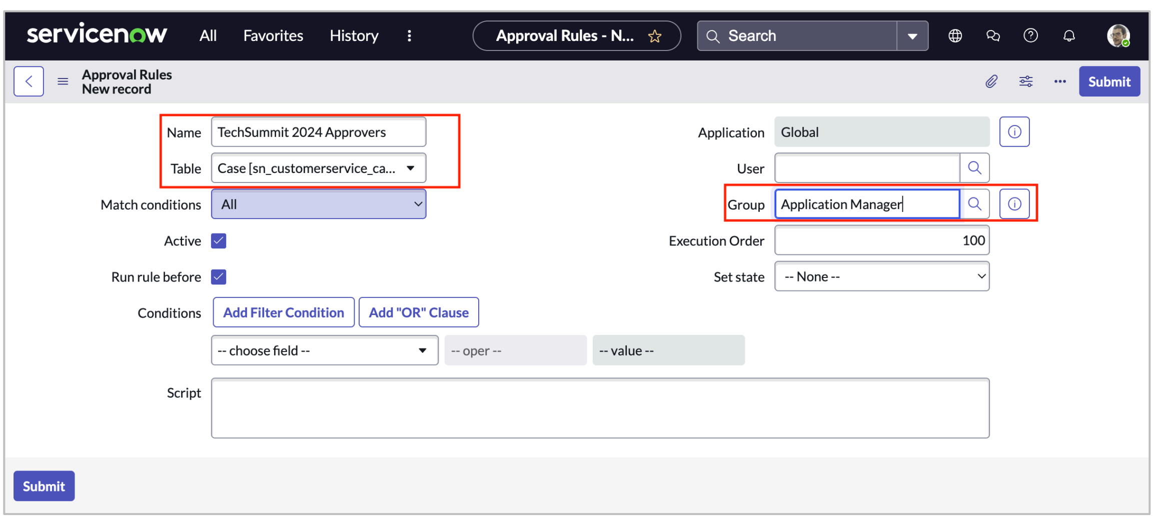
7. Select Save.
8. **Activate** your playbook with the changes just made.
9. Now setup an **approval rule**. From the Filter navigator type Approval (System Policy→ Rules → Approval)
10. Click **New**
11. Populate the following fields:

a. Name: **2024 Approvers**

b. Table: **Case** [sn_customerservice_case]

c. Group: **CAB Approval** (This group should have 6 members – just check)

d. Condition: You would normally have conditions set when this approval rule is triggered, but it's not necessary for this exercise.



12. Select the **Submit** button
13. You may get the following info message where the Approval Engine is not configured for the Case Table.

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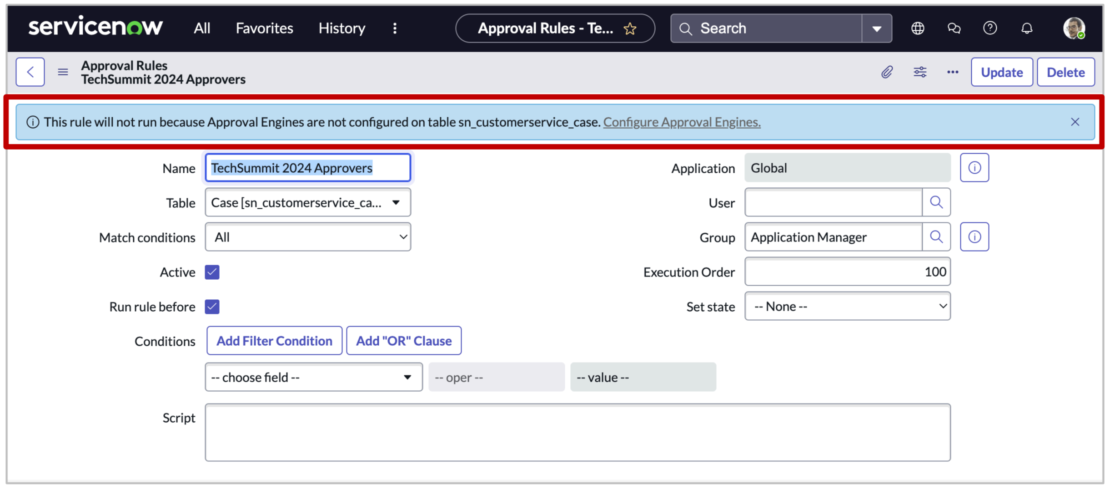
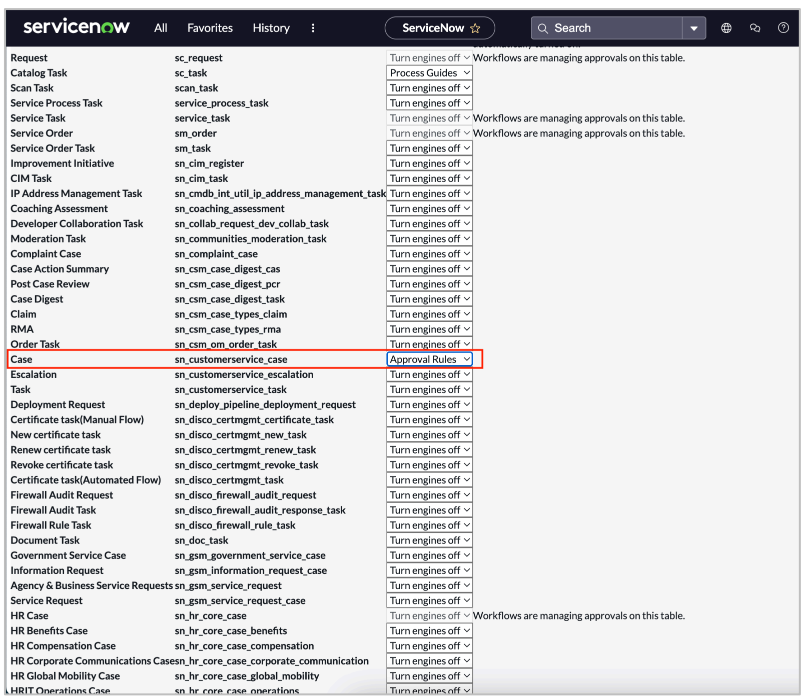


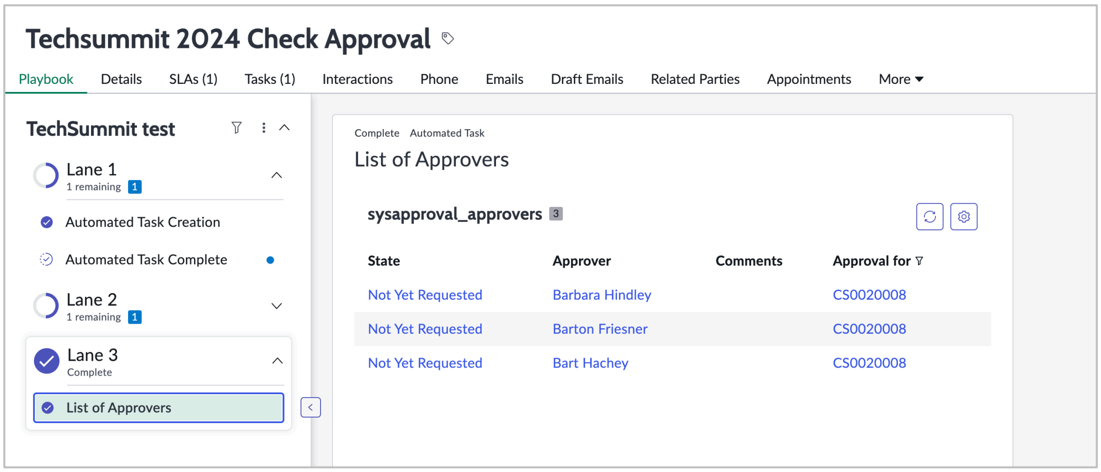
14. Select the "**Configure Approval Engines**".
15. Find the **Table for Case** [sn_customerservice_case]



16. Select the drop drown and change Tun Engines Off → Approval Rules
17. Scroll to the bottom and select **Save (May take up to 60secs or more to save).**
18. This will now turn the Approval Engine on for the Case Table.

Lab Results

1. Create a case based on the process trigger. You should see the following outcomes:
    a. Playbook is assigned to your case.
    b. When you navigate to the playbook at look at your approval activity, it should display a list of approvers from the Application Manager group.



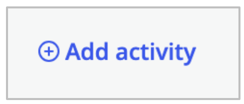
Congratulations, you have configured an approval and displayed it within a playbook!

Lab 3, Exercise 4: Create a Checklist

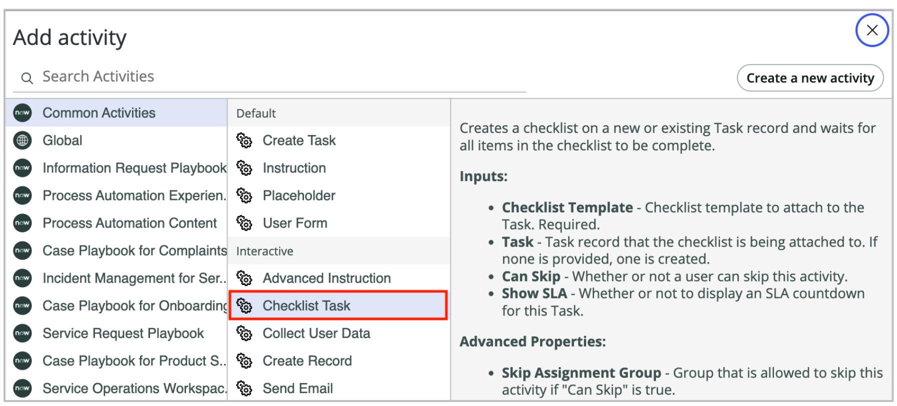
Checklist's can be used to show a list of tick box activities as part of a playbook. For this exercise, you may use an existing template called Example Checklist or create your own.

For this exercise, you're going to use Example Checklist; however, if you want to create your own checklist template in the Filter Navigator type "**checklist_template.list**". A list of templates are available. You will need to understand the syntax of how the list have been created and follow the same structure.

1. Navigate to Process **Automated Designer** and open an existing process you have already created.
2. In the 1st lane or whichever lane you want your automated task to created, select the "**Add Activity**" link.



3. Search for the "**Checklist Task**" under "Common Activities" and select it.



4. Change the Label if you like, but for this exercise it can stay the same.
5. Move to the Automation tab and populate the following fields:
   a. Checklist Template: **Document Checklist – Individual Customer (or the one you created if you opted for that)**
   b. Task: [Trigger → Case Record] **using the pill picker**

6. Select **Save.**

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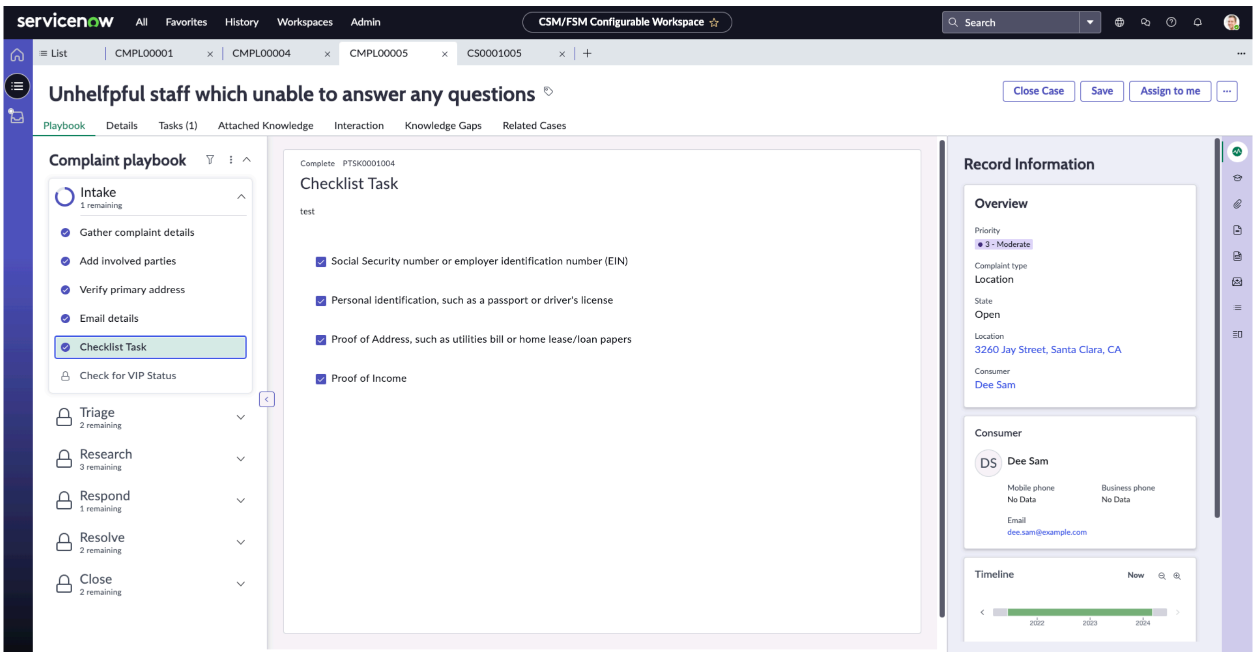
7. **Activate** your playbook with the changes just made.

Lab Results

1. Create a case based on the process trigger. You should see the following outcomes:
   a. Playbook is assigned to your case.
   b. When you navigate to the playbook and look at your Checklist activity, it should display a list of checkboxes based on the Checklist template you selected and/or created.



Congratulations, you have configured a Checklist and displayed it within a playbook!