

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 is 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

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:

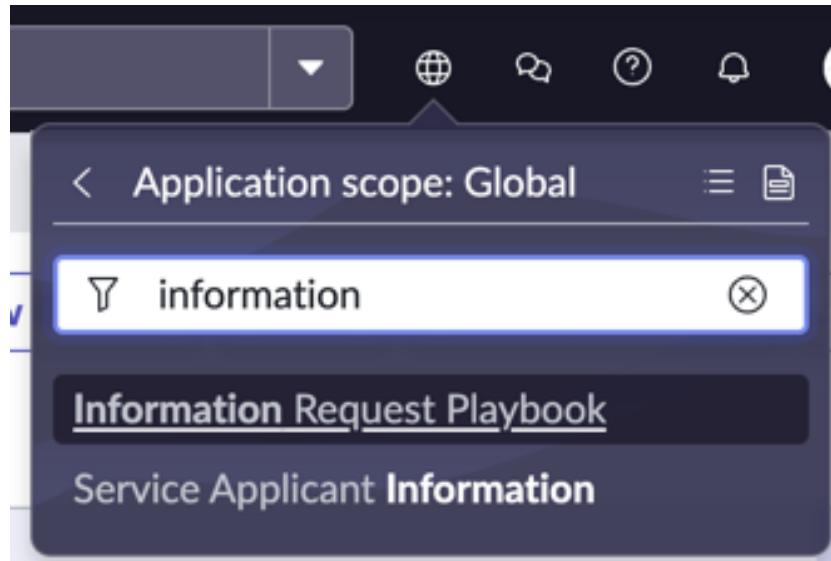
- Add a new activity step into an existing Playbook.
- Modify an existing Playbook Activity.

Lab 1, Exercise 1: Modify an existing Playbook Activity

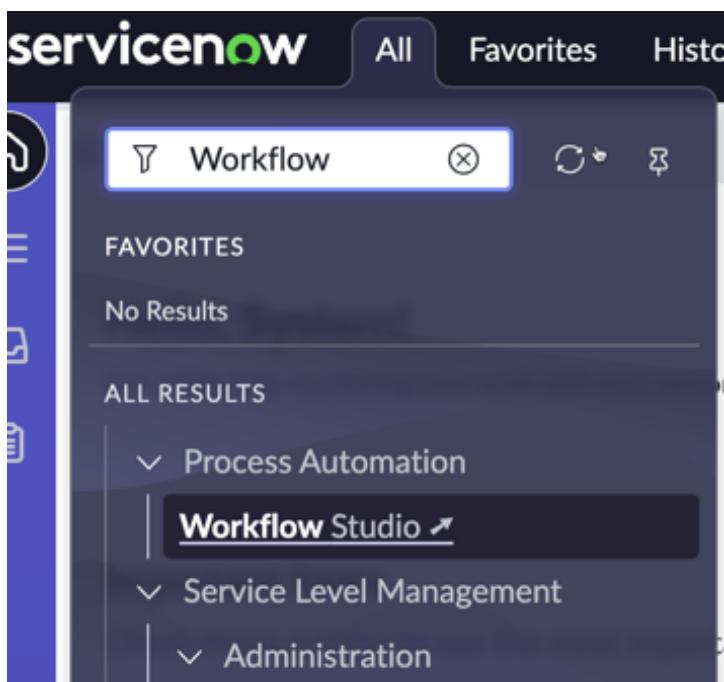
In this first exercise, you will use **Workflow Studio** to work with an existing playbook. Workflow Studio is the unified design experience for workflow automation, combining access to playbooks, decision tables, flows, actions, data streams, as well as integrations. You will work add an “**Information**” 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.

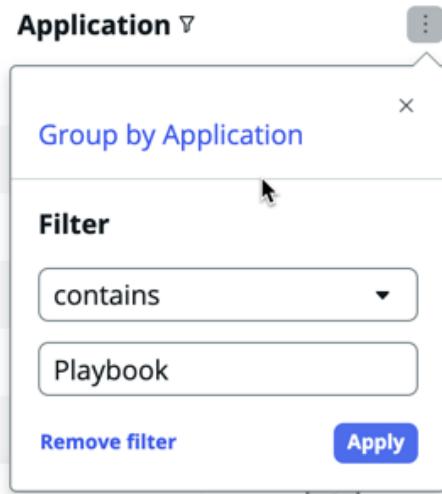


2. Navigate to **Process Automation > Workflow Studio** or use the Filter Navigator and search for **Workflow**.



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**

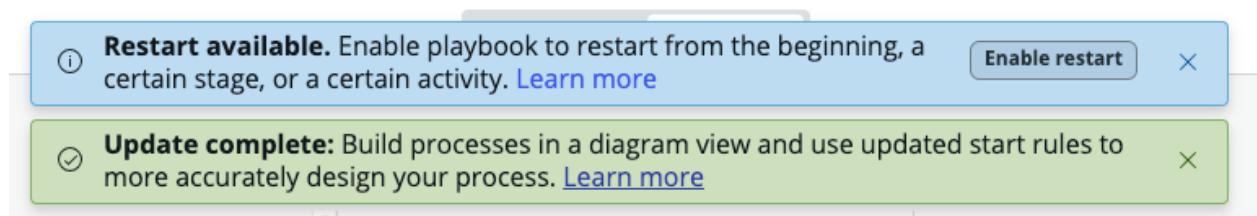
playbook but feel free to open one of the others to see the process.



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

<input type="checkbox"/>	Label	Application ▾	Status	Active	Updated ▾	Updated by
	Information Request	Information Request Playbook	Published	true	2025-01-11 23:28:23	admin
	Social Benefits Playbook	Social Benefits Playbook	Published	true	2024-10-14 00:08:13	admin
	Licenses/Permits Playbook	License and Permit Playbook	Published	true	2024-10-13 00:37:22	admin
	Complaint playbook	Case Playbook for Complaints	Published	true	2023-09-11 20:22:29	admin
	Service Request	Service Request Playbook	Published	✓ true	2023-06-07 14:58:12	admin
	Complaint playbook	Case Playbook for Complaints	Draft	true	2022-10-12 22:17:15	admin

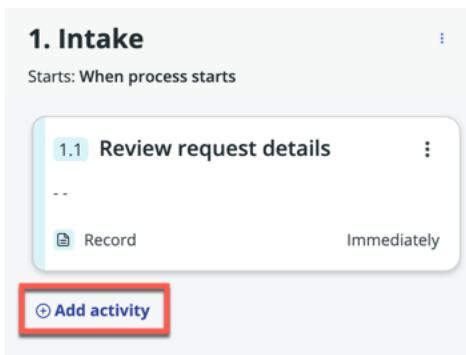
- If you receive a messages regarding enabling restart or upgrade complete, you may close these windows.



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

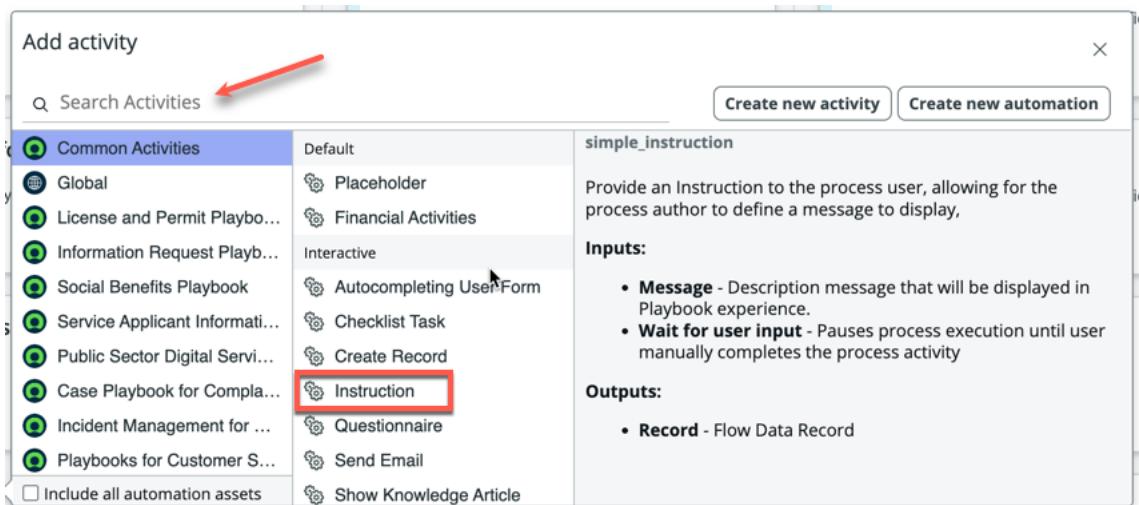
Diagram view Board view

- Under the “1. Intake” lane, click “Add activity” at the bottom. You will have to scroll down.



- 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.



- The **Instruction** activity is added to the canvas and the properties page displays. Rename the activity by modifying the Label property. Enter “I love ServiceNow”, or whatever you like.

1.2 Instruction properties Hide additional options

Details **Automation** **UI Layout**

Provide a label and brief description for your activity.

Label * I love ServiceNow

Description

Activity definition Edit

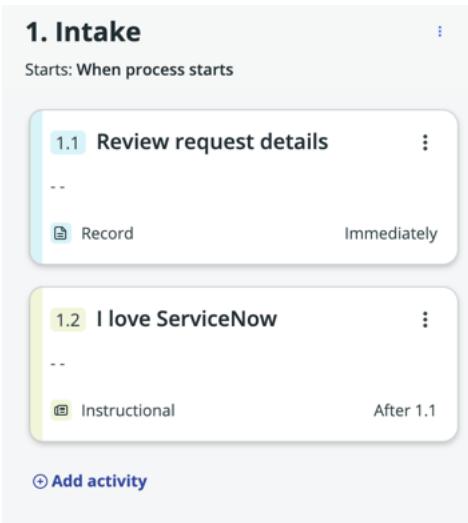
Schedule Start rule Define when the system will begin to process your activity. [Learn more](#)

When stage starts After specific activities

Starts after

Cancel Save and close

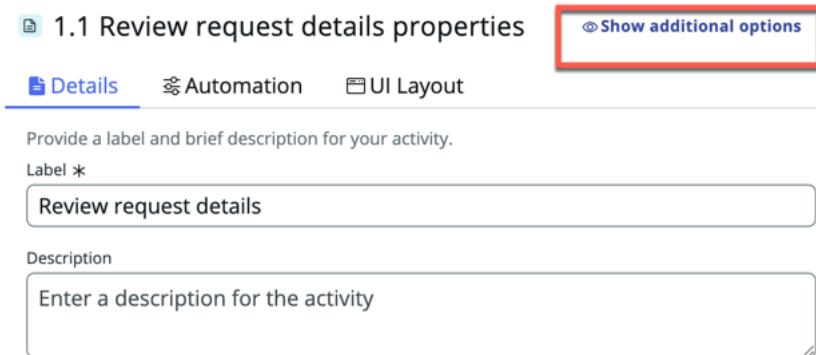
10. Then click "**Save and Close**". The Instruction step should already be the last step of the lane and should look like the image below. That said, dragging and dropping allows you to place the activity anywhere on the canvas you like.



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.

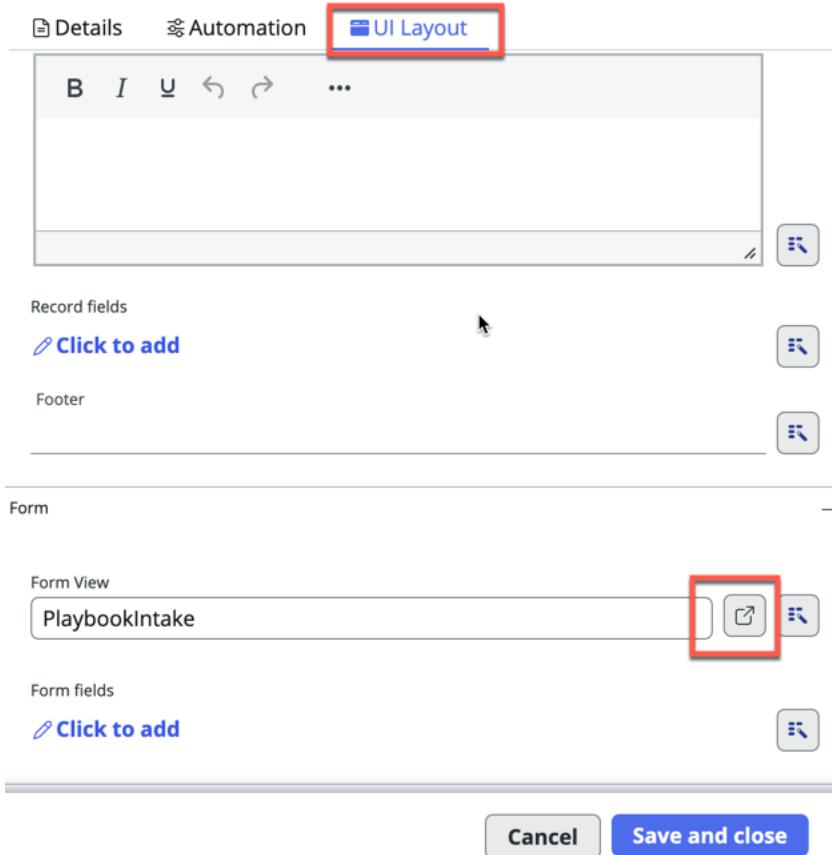
1. Next, you will modify an existing activity to add new data fields to collect. In the **Intake** stage, click the “**Review request details**” activity. Then click “**Show additional options**”.



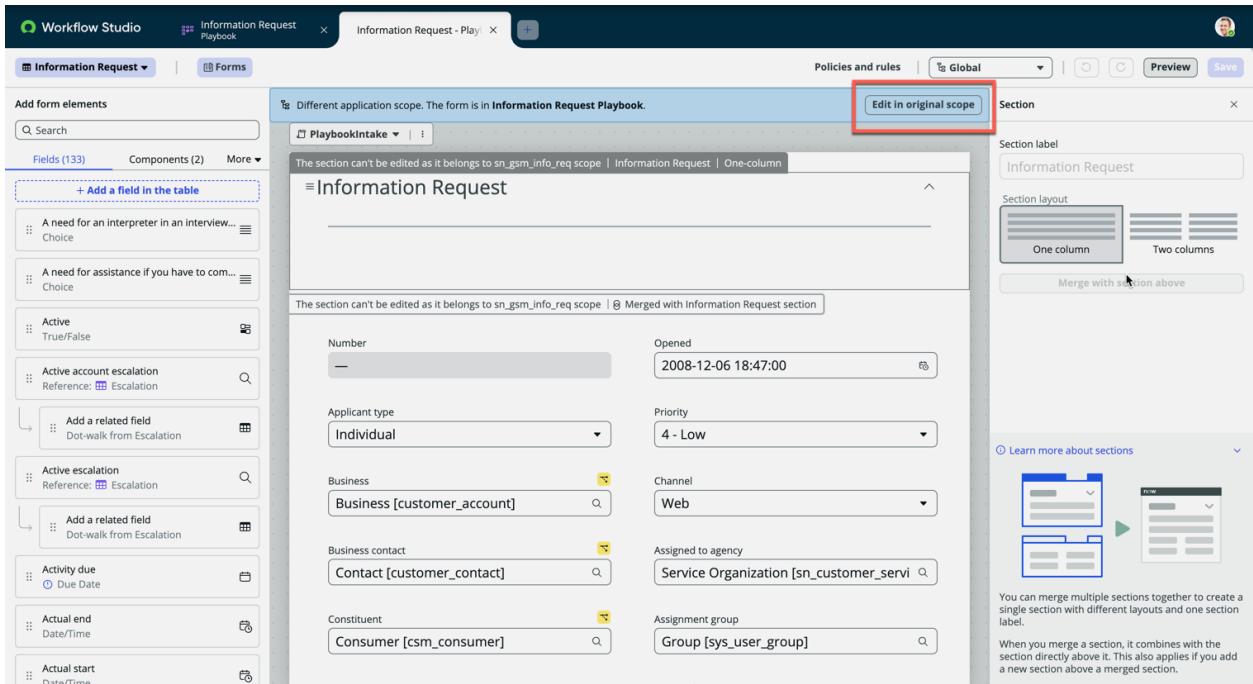
The screenshot shows the '1.1 Review request details properties' screen. At the top, there is a blue button labeled 'Show additional options' with a red box around it. Below the button are three tabs: 'Details' (which is selected), 'Automation', and 'UI Layout'. Under the 'Details' tab, there is a 'Label' field containing 'Review request details' and a 'Description' field containing 'Enter a description for the activity'.

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

1.1 Review request details properties

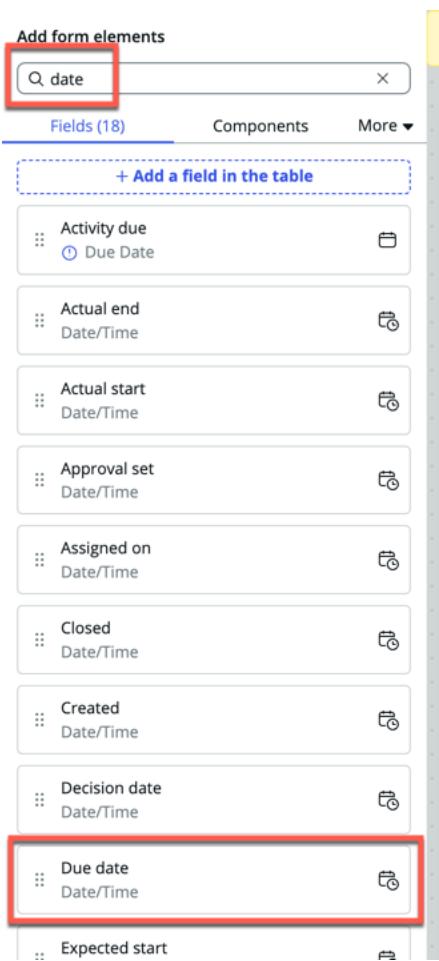


3. **Form Builder** will open allowing you to design the form for the Intake stage. If you are not already in the "Information Request Playbook" scope, click "Edit in original scope".



The screenshot shows the ServiceNow Workflow Studio interface. The top navigation bar includes 'Workflow Studio', 'Information Request Playbook', 'Information Request - Play', 'Policies and rules', 'Global', 'Preview', and 'Save'. The main workspace displays the 'Information Request' form under the 'Playbookintake' scope. A red box highlights the 'Edit in original scope' button in the top right corner of the main content area. The form fields include 'Number' (value: -), 'Opened' (value: 2008-12-06 18:47:00), 'Applicant type' (value: Individual), 'Priority' (value: 4 - Low), 'Business' (value: Business [customer_account]), 'Channel' (value: Web), 'Business contact' (value: Contact [customer_contact]), 'Assigned to agency' (value: Service Organization [sn_customer_servi]), 'Constituent' (value: Consumer [csm_consumer]), and 'Assignment group' (value: Group [sys_user_group]). To the right of the form, there's a 'Section' panel with 'Section label' (Information Request), 'Section layout' (One column, Two columns), and a 'Merge with section above' button. Below the section panel, there's a 'Learn more about sections' section with a diagram illustrating merging sections.

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”.

You are editing in the **Information Request Playbook** application scope.

PlaybookIntake

Service Organization [sn_customer_servi] | Constituent Benefits

Requesting on behalf of someone

Merged with Information Request section | One-column

On behalf of

Short description *

Description *

ⓘ

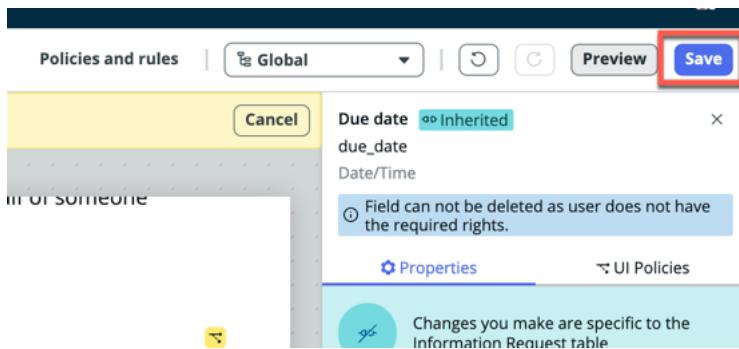
6. Use the left vertical hamburger menu on the “**Due date**” field, and drag and drop it under “**Description**”. You can also reposition the field if you prefer it in a different location.

Due date
Date/Time

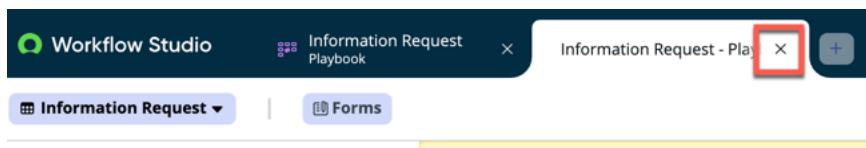
Description *

Due date
2008-12-06 18:47:00

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



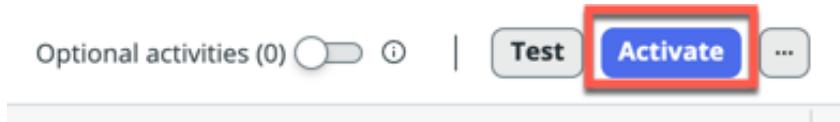
8. You can now close the **Form Builder** tab.



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**”.



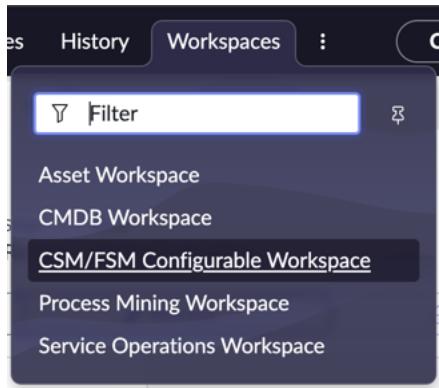
10. Click “**Activate**” in the top right.



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**”.



- Click the "List" icon in the left vertical navigation bar. Then scroll to "Information Requests" and click "All".

- In the list header, click "New".



- 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**

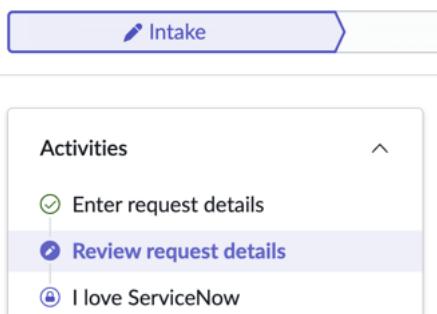
Requestor type: **Representative of the news media**

The screenshot shows the 'Create New Information Request' page in the CSM/FSM Configurable Workspace. The 'Activities' sidebar has 'Enter request details' selected. The main form includes fields for 'On behalf of', 'Short description *', 'Description *', and a 'Due date' field which is highlighted with a red border. Below these are sections for 'Contact information' and 'Preferred communication method *'. A sidebar titled 'Record Information' is visible on the right.

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

This screenshot shows the 'Expedited processing' section at the bottom of the form. It includes a checkbox for 'Expedited processing', a 'Justification' text area, and a large 'Save' button which is highlighted with a red box.

- Notice the playbook automatically advances to the next activity.



7. On the “**Review request details**” form click **Submit**.



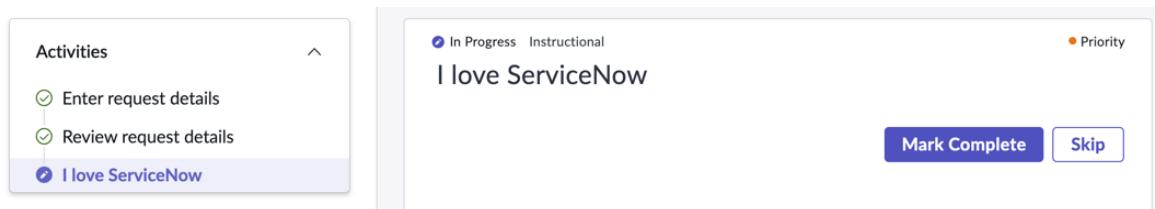
8. Then “**Assign to me**”.



9. Then “**Move to Review**”.



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



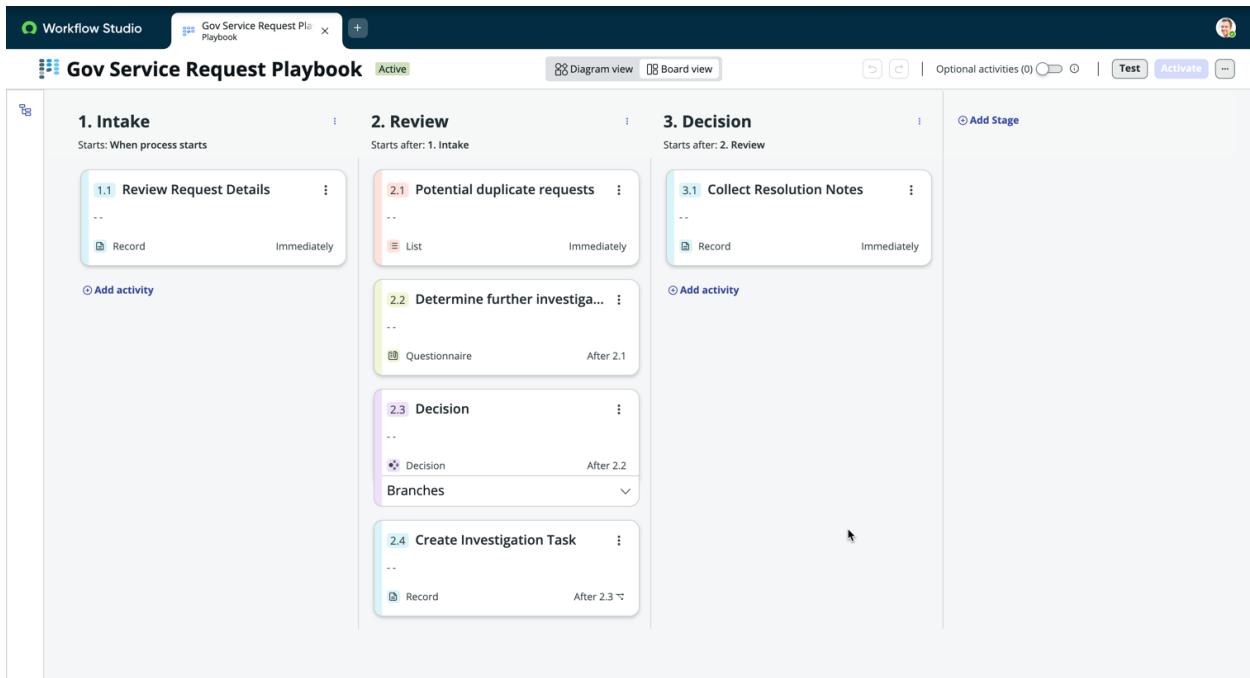
Congratulations! You have completed Lab 1.

Lab 2 – Configure a Playbook from Scratch

Background / Purpose

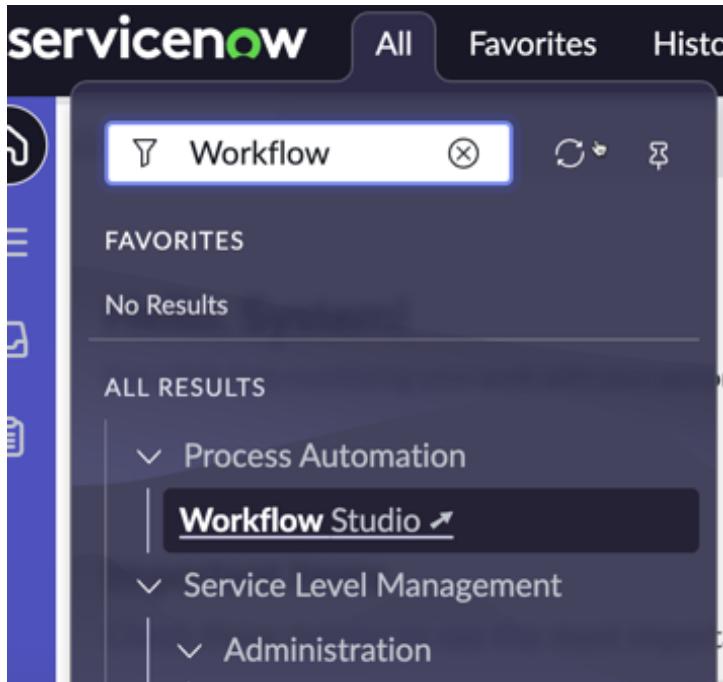
In this exercise you will create a new playbook from scratch. You have received requirements to configure a playbook for a Government Service Request. Yes, you could easily extend the out of the box Service Request Playbook, but what's the fun in that?

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**.



- On the Playbooks tab, click “New > Playbook”.

The screenshot shows the "Playbooks" list page with 41 entries. The "New" button is highlighted, and a modal window is open, showing options for creating a new Playbook, including "Flow", "Subflow", "Action", and "Decision table".

Label	Application	Status	Active	Updated
Information Request	Information Request Playbook	Published	true	2025-01-12 18:58:58
Social Benefits Playbook	Social Benefits Playbook	Published	true	2024-10-14 00:08:13

- 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**

Let's get the details for your playbook

Playbook name *

Gov Service Request Playbook

Description

Lab playbook for Fed Forum 2025

Application *

Service Request Playbook

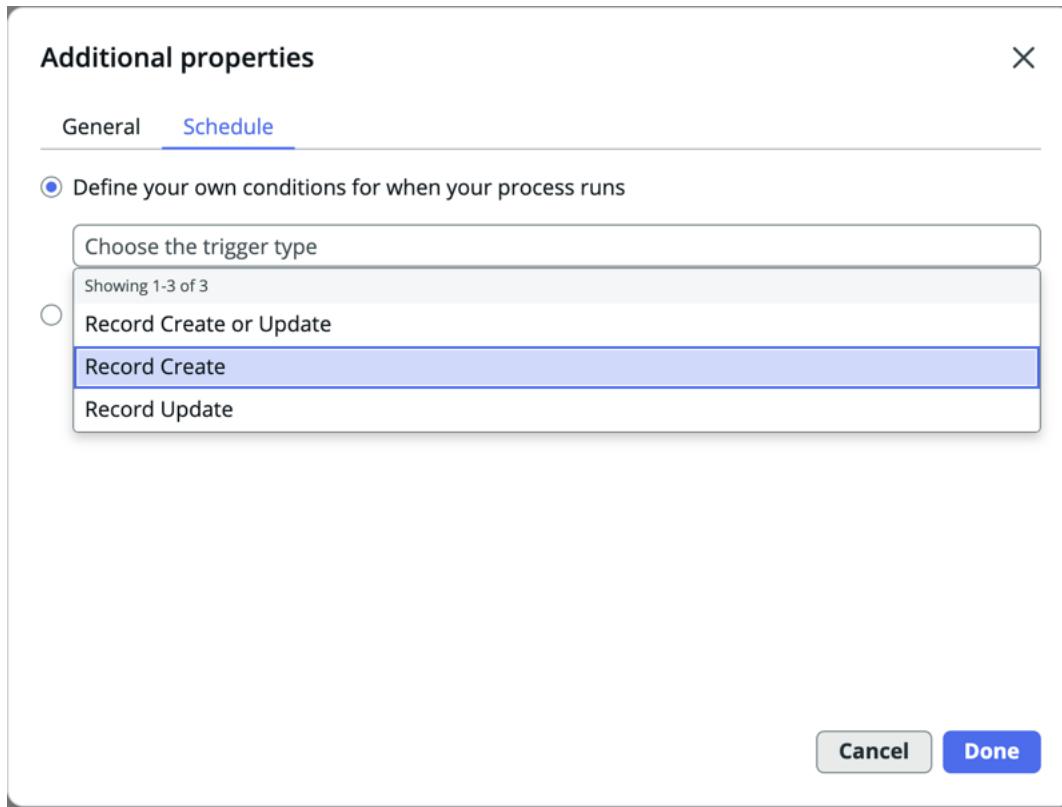
Cancel

Build playbook

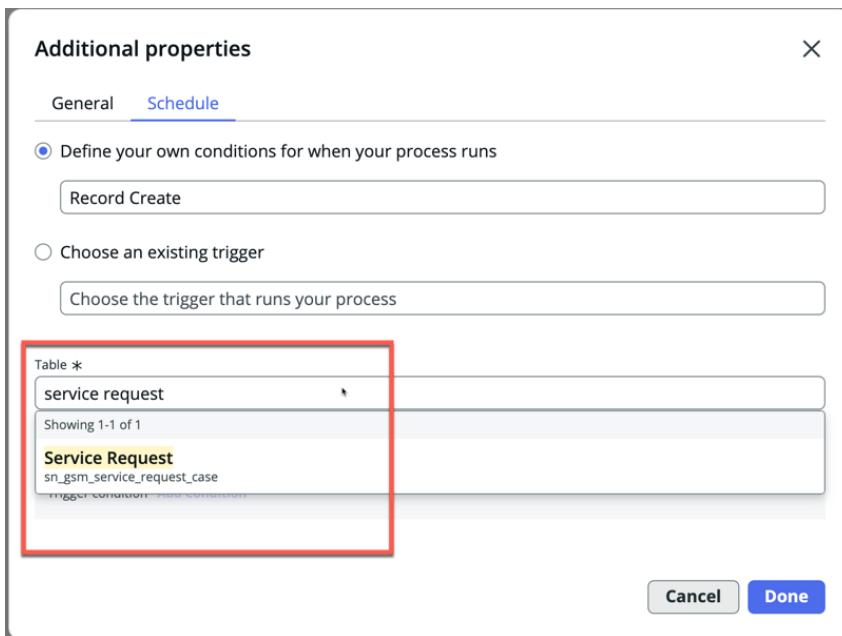
4. Click on the trigger shape.



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**.

Condition to run

Trigger condition

Select field ▾ Select operat... ▾ Enter value or and ×

+ New condition set

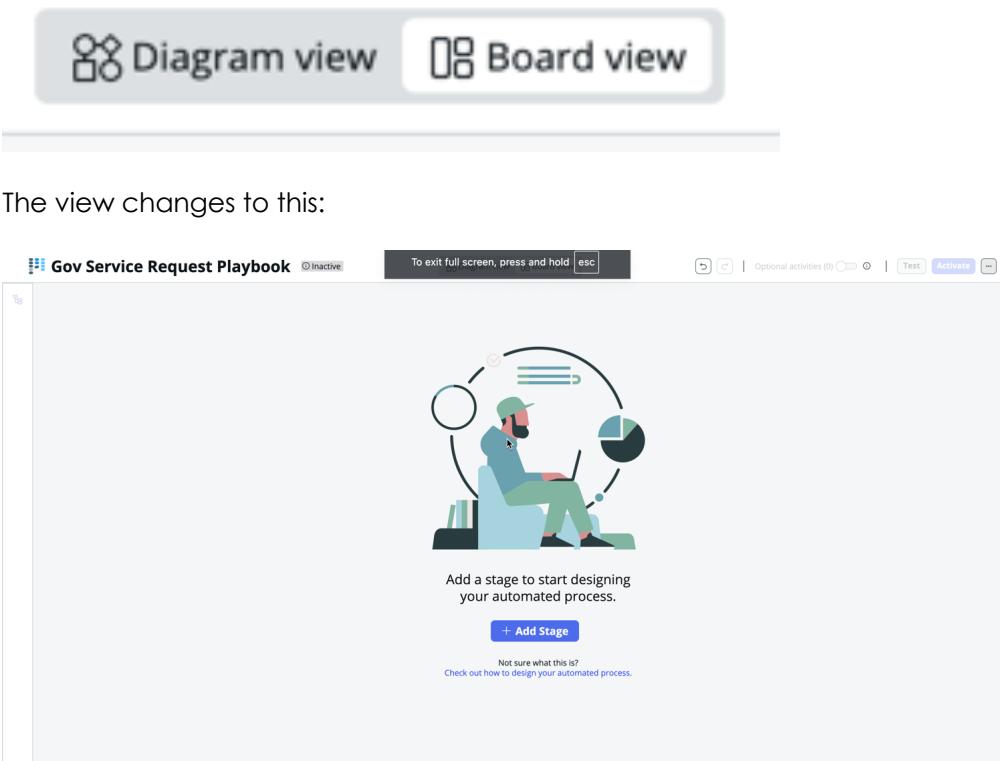
Run my trigger *

Once

Run this trigger on extended table

Cancel 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.



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**.

New Stage properties

[Show additional options](#)

Provide a label and brief description for your stage.

Label *

Intake

Description



Schedule

Start rule

Define when the system will begin to process your stage. [Learn more](#)

- When process starts
- After specific stages

Starts after

Cancel

Save and close

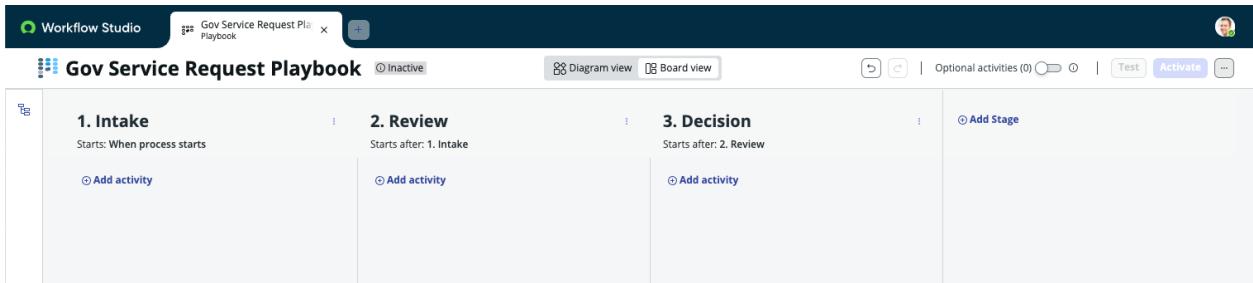
11. After selecting **Save and close**, your first stage will be defined.

The screenshot shows the ServiceNow Workflow Studio interface with the 'Gov Service Request Playbook' selected. The 'Intake' stage is listed with the following details:

- Label:** Intake
- Starts:** When process starts
- Add activity:** (button)

A red box highlights the 'Save and close' button at the bottom right of the stage card.

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.

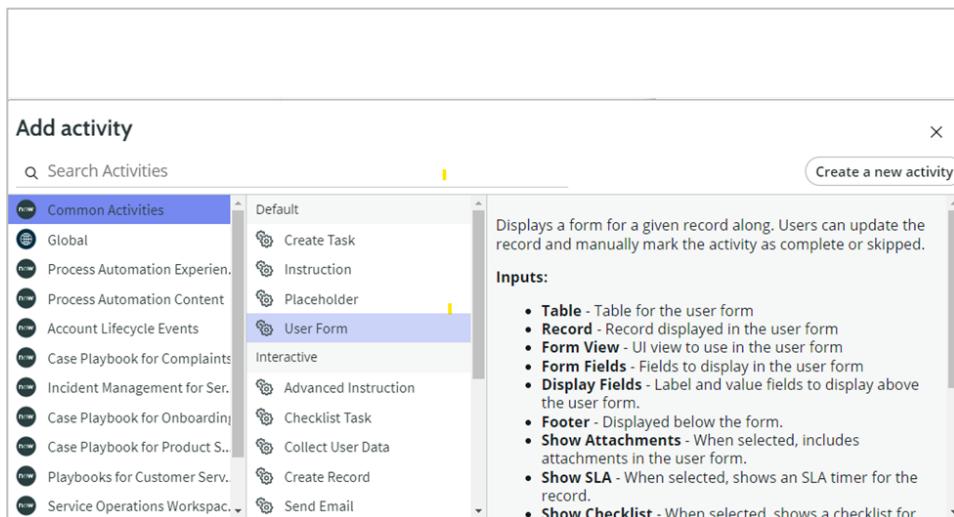


Lab 2, Exercise 2: Configure the Intake Stage

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**.

1.1 User Form properties

Show additional options

Details Automation UI Layout

Provide a label and brief description for your activity.

Label *

Review Request Details

Description

Enter a description for the activity

Activity definition

User Form

Schedule

Start rule

Define when the system will begin to process your activity. [Learn more](#)

When stage starts

After specific activities

Starts after

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.

1.1 User Form properties Show additional options

Details Automation UI Layout

Use data inherited from Flow Designer to automate your activity's actions. [Learn more](#)

Automation

Manual Activity

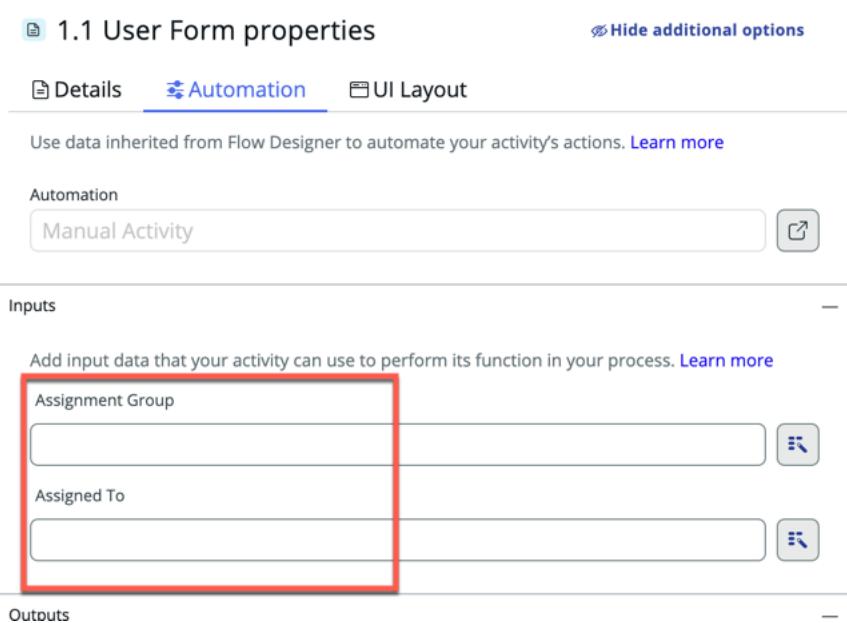
Inputs

Add input data that your activity can use to perform its function in your process. [Learn more](#)

Assignment Group

Assigned To

Outputs



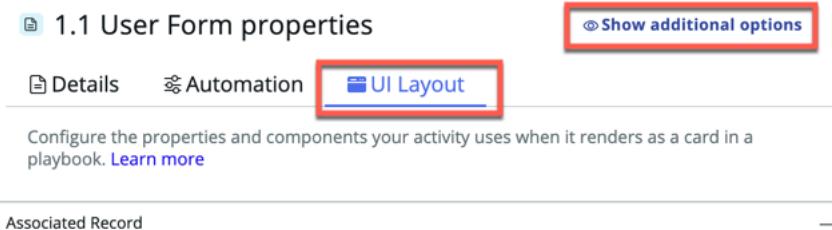
5. Click **UI Layout** and then **Show Additional Options**.

1.1 User Form properties Show additional options

Details Automation **UI Layout**

Configure the properties and components your activity uses when it renders as a card in a playbook. [Learn more](#)

Associated Record



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

1.1 User Form properties

[Show additional options](#)

[Details](#) [Automation](#) [UI Layout](#)

Configure the properties and components your activity uses when it renders as a card in a playbook. [Learn more](#)

Associated Record

Associated table

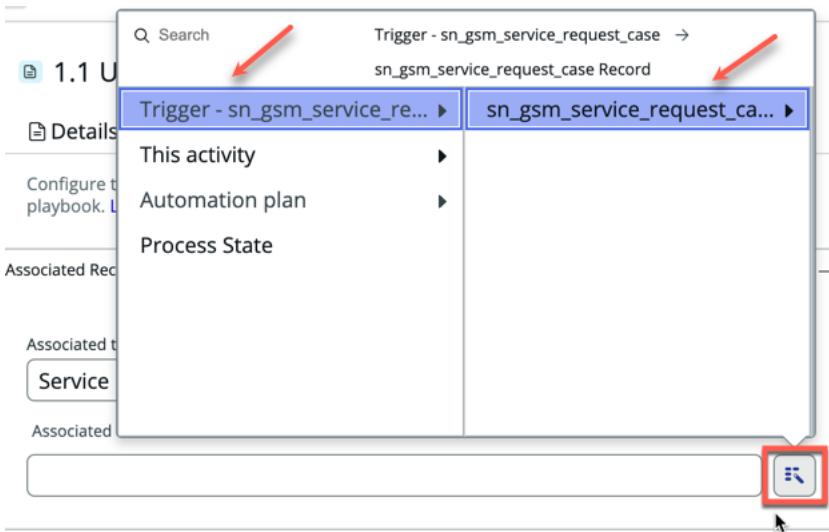
service request*

Showing 1-1 of 1

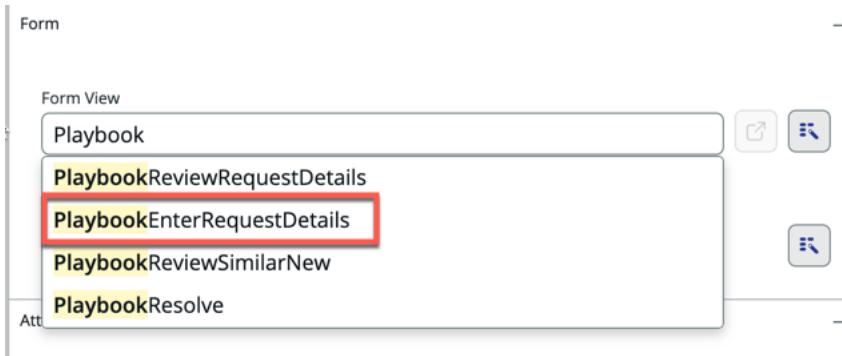
Service Request

sn_gsm_service_request_case

- 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.



- 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**.

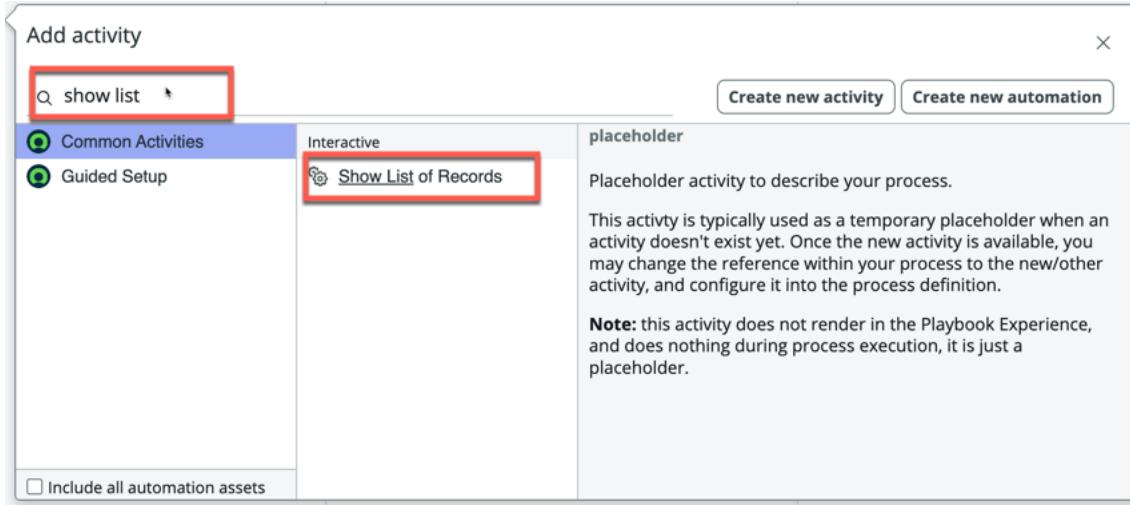


Congratulations, you configured the first stage of the playbook! When a new case is created, the playbook will present the agent with the form for them to review the current case.

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**”.

2.1 Show List of Records properties [Show additional options](#)

[Details](#) [Automation](#) [UI Layout](#)

Provide a label and brief description for your activity.

Label *

Description

Activity definition

3. Select UI Layout then Show additional options.

2.1 Show List of Records properties

[Show additional options](#)

Details Automation UI Layout

Configure the properties and components your activity uses when it renders as a card in a playbook. [Learn more](#)

Associated Record

Click *Show additional options* to see the inputs for this section

Details

Click *Show additional options* to see the inputs for this section

List Details

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

Associated Record

Associated table

Service Request



Associated record

Tri... ▶ sn_gsm_service_reques... X



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.

List Details

List Title

Similar Cases



Table

sn_customerservice_case

Showing 1-2 of 2

Case

sn_customerservice_case



Case Report

sn_customerservice_case_report

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

Table

Case

List Query **Add Condition**

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

Add Condition

Q consumer

Consumer

Consumer Profile

Related Party Consumers

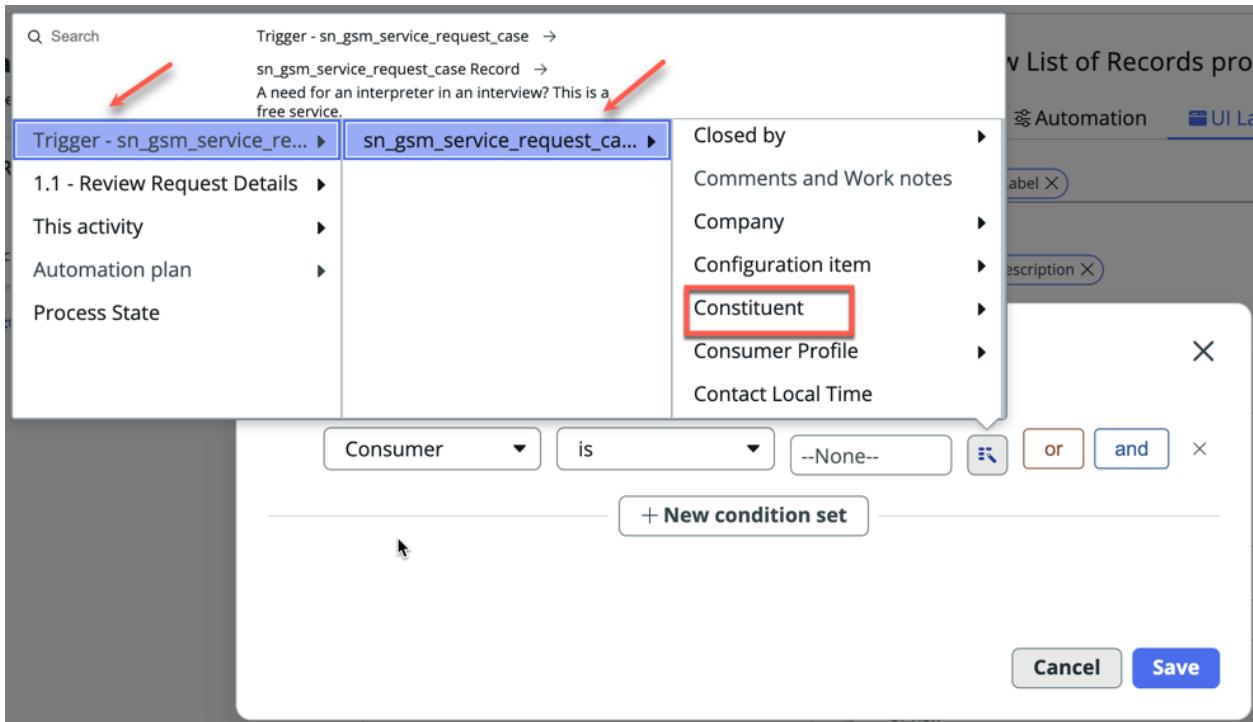
Other

Questions

or and New condition set

Cancel Save

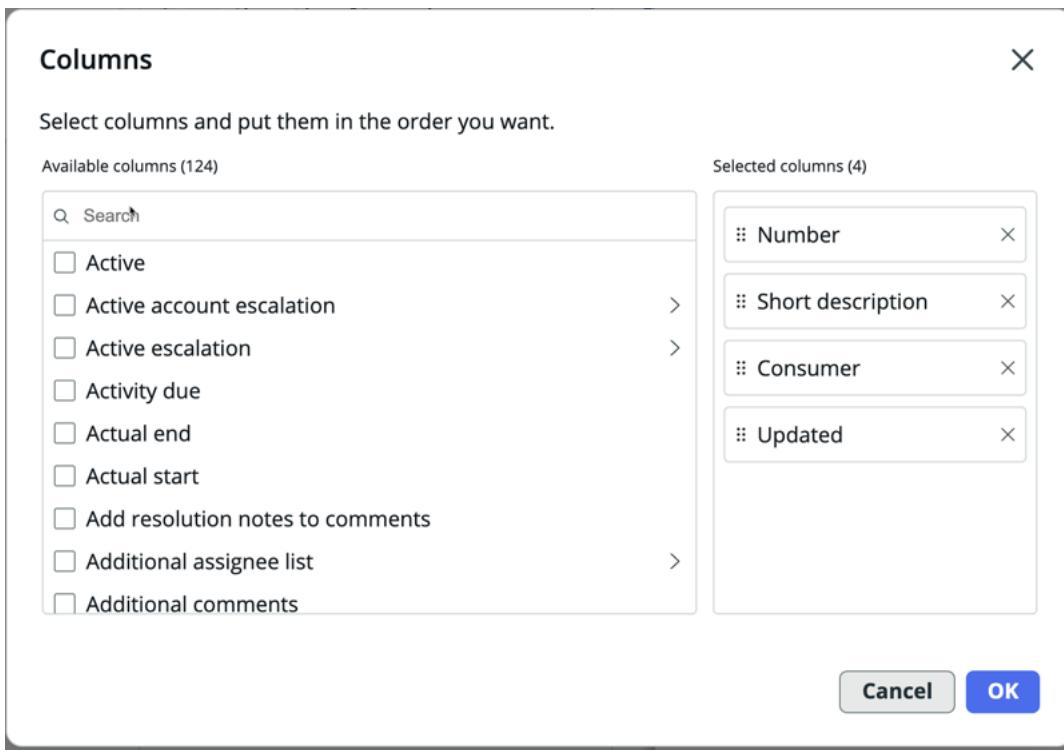
- Select "Is" for the condition, then using the data picker icon, select **Trigger-sn_gsm_service_request_case > sn_gsm_service_request_case > Constituent**. Click **Save**. Essentially, this condition builder is saying "I want to see all cases in the system, where the consumer equals the constituent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



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

Columns
/ Click to add

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



11. Then Save and close.

Cancel **Save and close**

12. As previously mentioned, quite often process require human intervention. The Questionnaire 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 **Questionnaire**.

2. Review Starts after: 1. Intake

3. Decision Starts after: 2. Review

Add activity

Add activity

Search Activities

Category	Activity	Description
Common Activities	Placeholder	decision_table_first_result_evaluation
Global	Financial Activities	Execute rules in a decision table. When this activity runs, it will immediately finish and continue the process execution. The activity returns the result of the first matching decision rule, based on the rank of the rules. To return results from all matching rules, add the decision table to a subflow.
License and Permit Playbook	Autocompleting User Form	
Information Request Playbook	Checklist Task	
Social Benefits Playbook	Create Record	
Service Applicant Information	Instruction	
Public Sector Digital Services	Questionnaire	
Case Playbook for Compliance	Send Email	
Incident Management for...	Show Knowledge Article	
Playbooks for Customer Success		
<input type="checkbox"/> Include all automation assets		

Create new activity **Create new automation**

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

2.2 Questionnaire properties [Show additional options](#)

Details **UI Layout** **Questionnaire**

Provide a label and brief description for your activity.

Label *

Determine further investigation

Description

Enter a description for the activity

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

2.2 Questionnaire properties

[Hide additional options](#)

[Details](#) [UI Layout](#) [Questionnaire](#)

Fill out one or both fields by assigning this questionnaire to a group or individual.

Assignment Group for this process step

Trigger ▶ ... ▶ Assignment group X

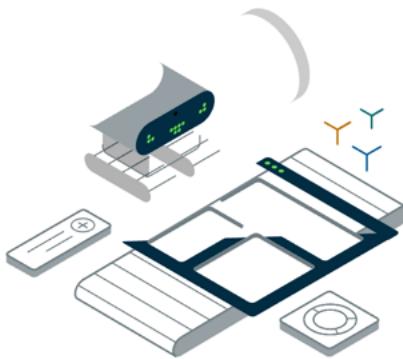


Assigned To for this process step

Trigger ▶ ... ▶ Assigned to X



Questionnaire



Begin creating your questionnaire by defining your questions!

[+ 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.

Questionnaire

Edit questionnaire



Question 1

Question *

Required question

Type of answer * ⓘ

String

Max length *

+ Add question

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

Questionnaire

Edit questionnaire



Question 1: Does any potential duplicate require further inv...

Question *

Required question

Type of answer * ⓘ

Choice

Choice list source

Create new choice list

Choices ⓘ

Add

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

Questionnaire

Edit questionnaire



Question 1: Does any potential duplicate require further investigation?

Question *

Does any potential duplicate require further investigation?

Required question

Type of answer *

Choice

Choice list source

Create new choice list

Choices

Type a choice and hit ENTER

Add

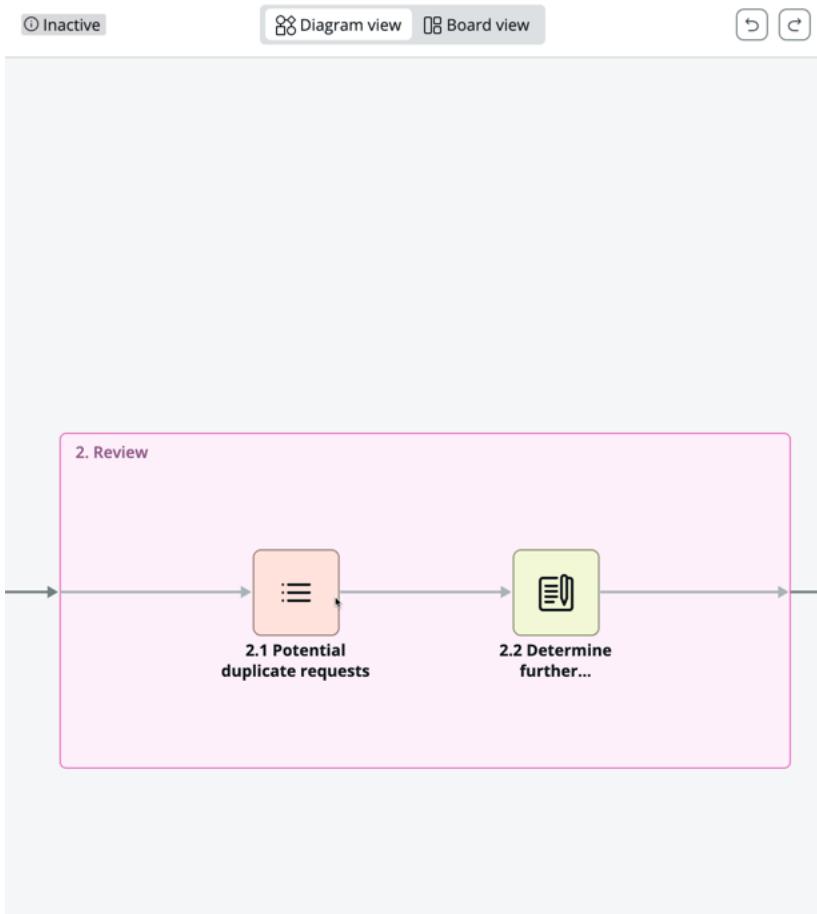
Label *	Value *
1 Yes	yes
2 No	no

+ Add question

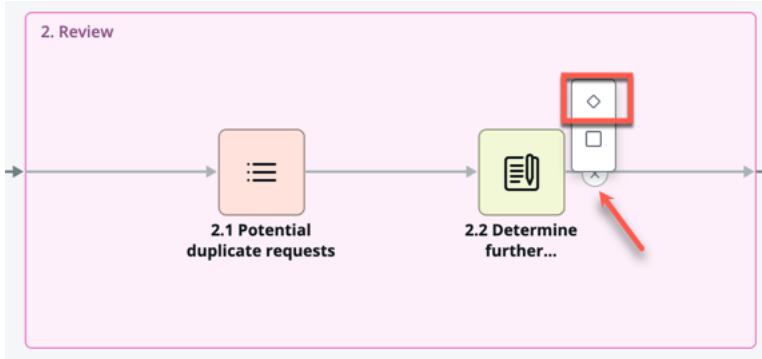
Cancel

Save and close

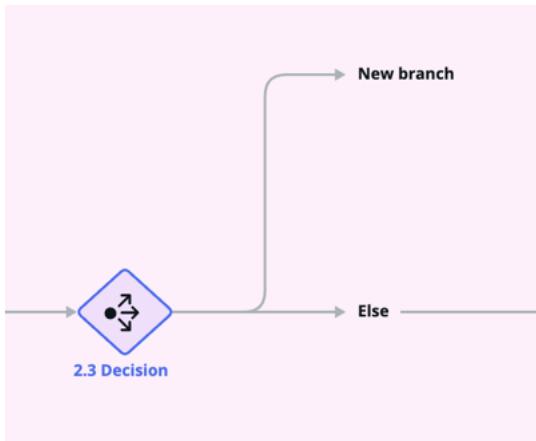
18. For this next step, you will switch to **Diagram View** to better visualize our decision branching.



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**.

2.3 Decision properties ⊕ Show additional options

⊕ Details ↗ Branches

Branches Add new branch

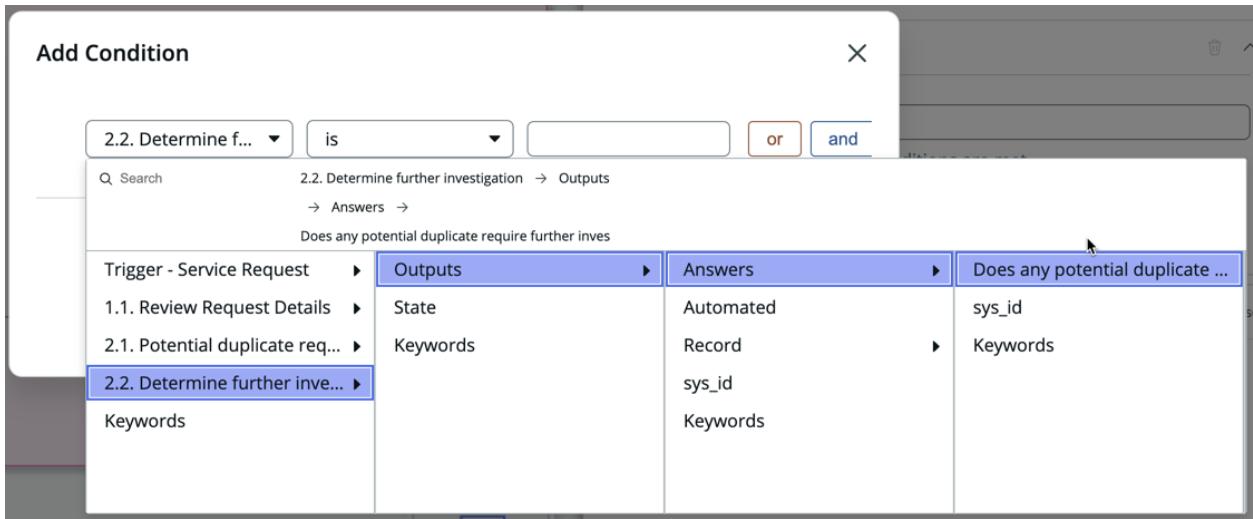
Require investigation ⊖ Branch label * Deletes ↑

This branch will execute if all conditions are met

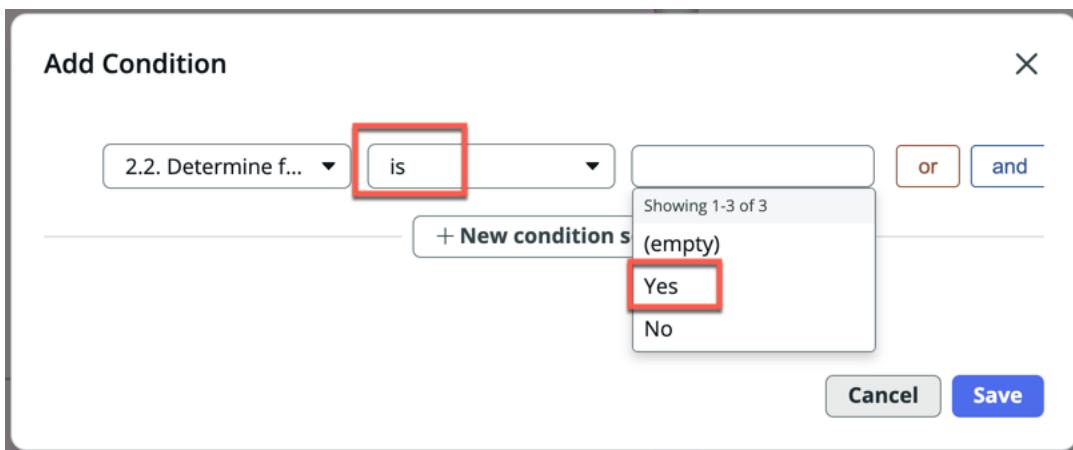
Branch condition * Add Condition

Else Runs when all other branches are false

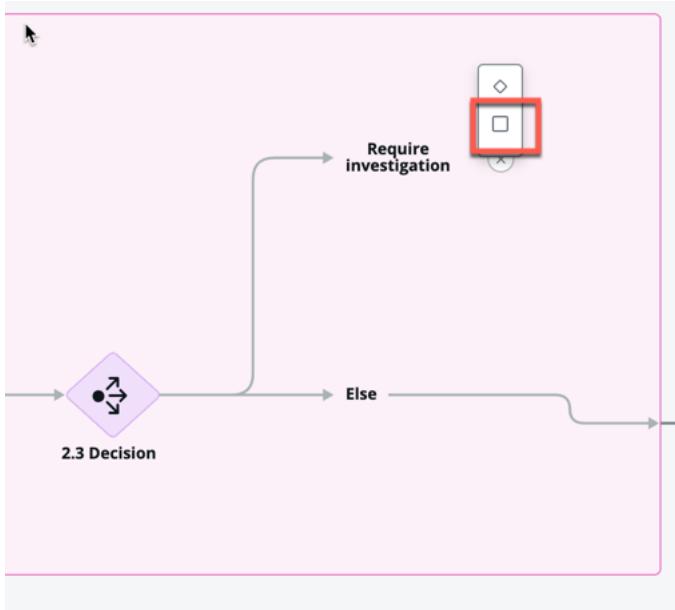
21. Select **2.2 Determine further investigation > Outputs > Answers > Does any potential duplicate require investigation.** This dynamically references the results of the question answered in the previous step.



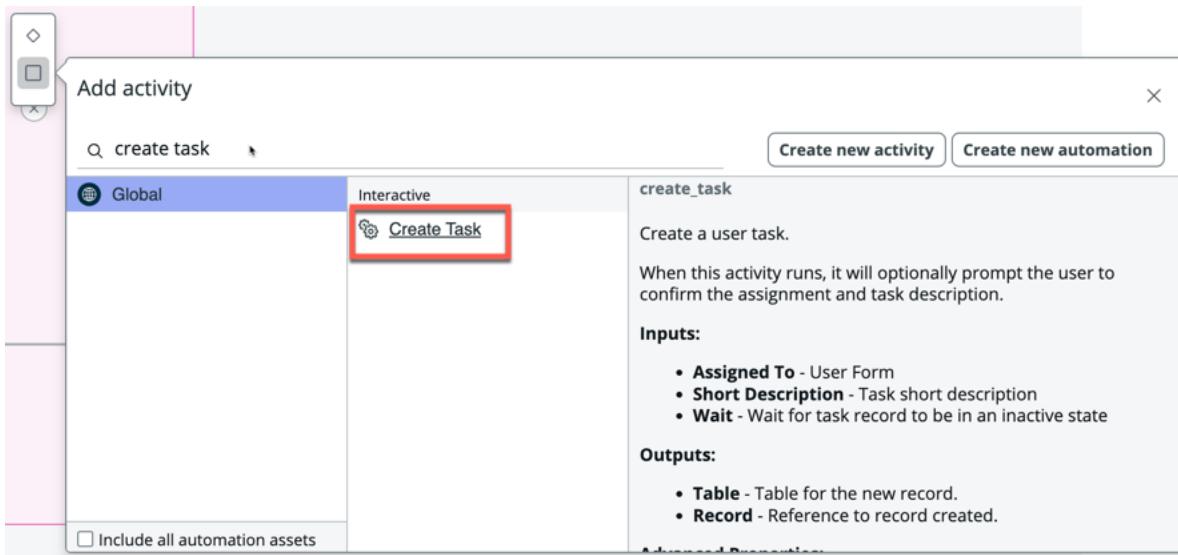
22. Set the condition to “Is”, then select **Yes**. Click **Save** then **Save and close**.



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.

2.4 Create Task properties

[Hide additional options](#)

Assigned to this Process Step

Trigger ▶ ... ▶ Assigned to X

Task Table

Task	
task_service_offering	
Task	
task	
Task	
sc_ic_task_defn_staging	
Task	
sn_customerservice_task	
Task / KB Relationship	
task_rel_kb	
Task Action Workflow	
task_action_workflow	

Wait for user input

Yes

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**.

Short Description

Review duplicate cases

27. Click **Add field**.

Add Field

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

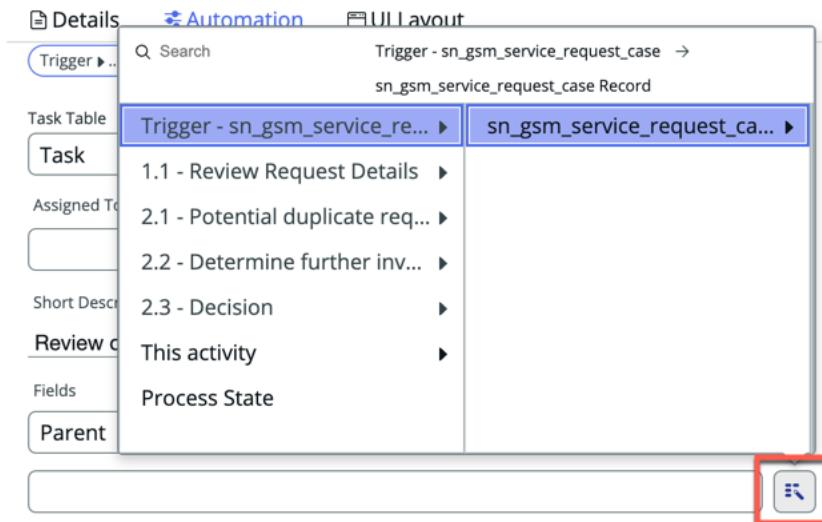
Fields

Q parent

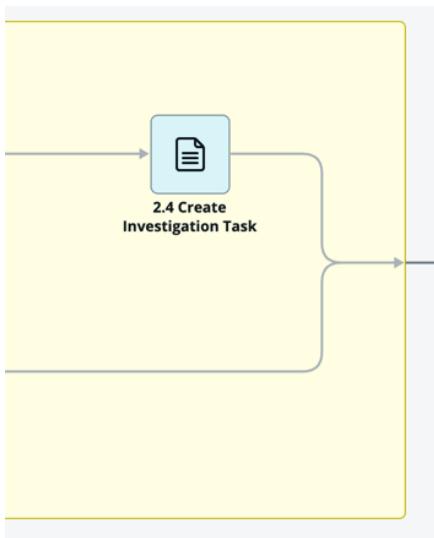
Parent

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.

2. Review

Starts after: 1. Intake

- 2.1 Potential duplicate requests
- 2.2 Determine further investiga...
- 2.3 Decision
- 2.4 Create Investigation Task

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.

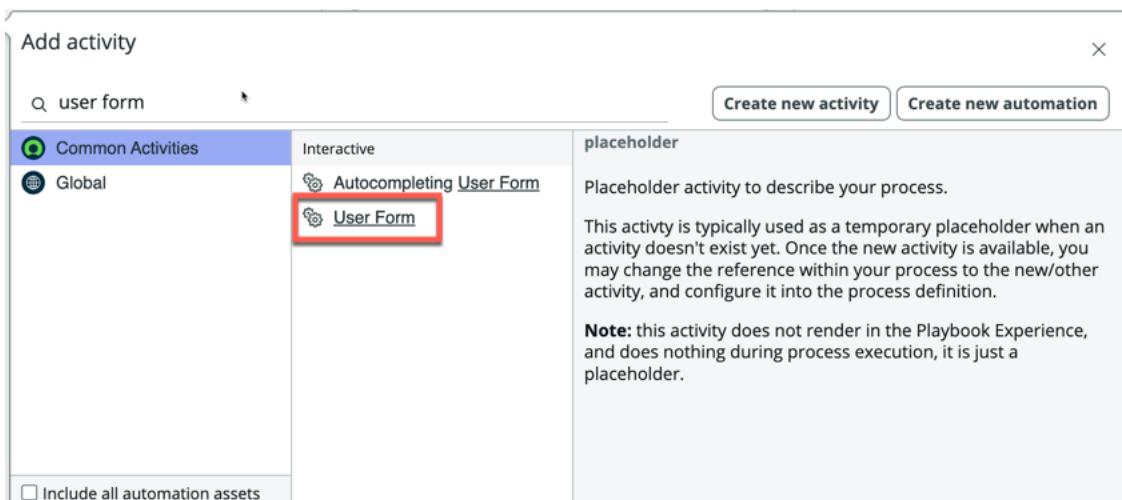
- In the **Decision** stage, click **Add activity**.

3. Decision

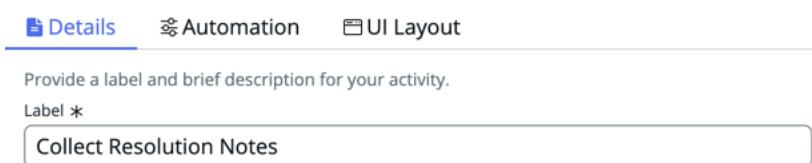
Starts after: 2. Review

[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.

3.1 User Form properties

Show additional options

Details

Automation

UI Layout

Configure the properties and components your activity uses when it renders as a card in a playbook. [Learn more](#)

Associated Record

Associated table

Service Request

Associated record

Tri... ➔ sri_gsm_service_reques... X

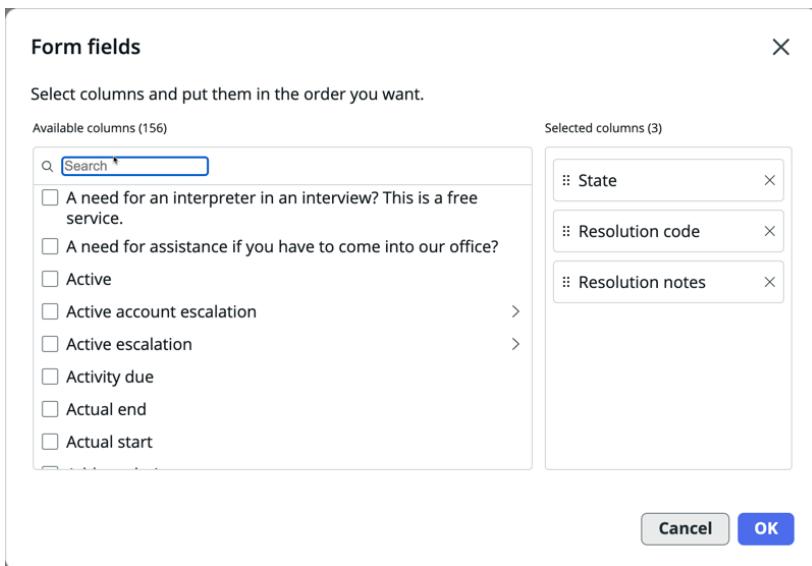
5. Since you only need a few fields, scroll down to **Form fields** and click **Click to add**.

Form

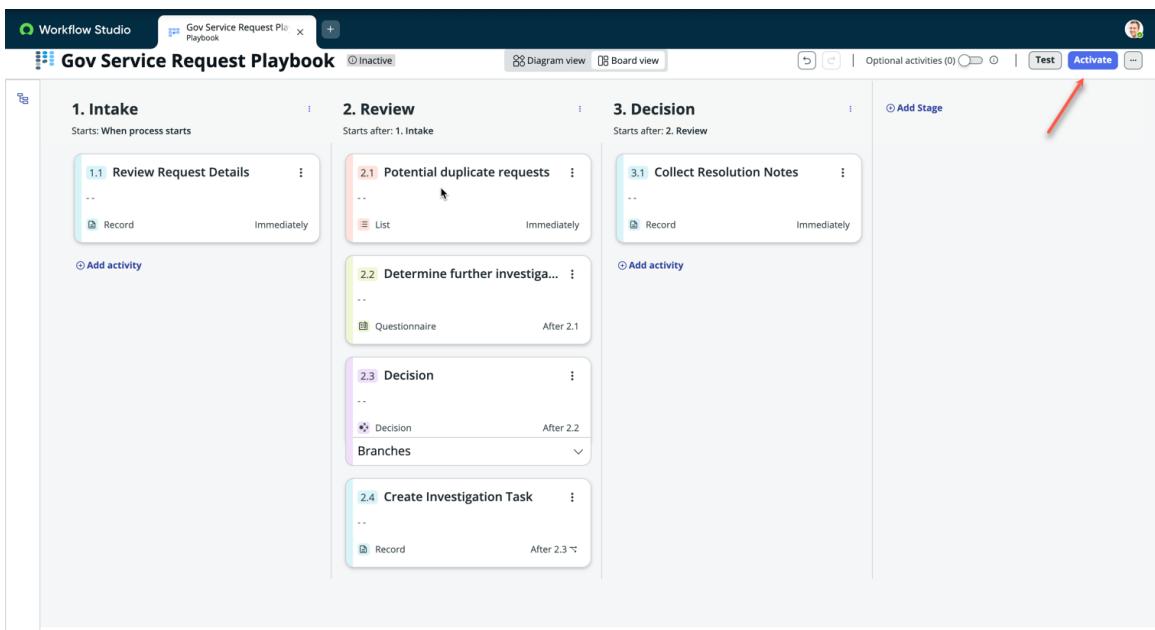
Form View

∅ Click to add

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



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



Lab 2, Exercise 5: Test your playbook

- 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.

Label	Application	Status	Active	Updated	Updated
Gov Service Request Playbook	Service Request Playbook	Published	true	2025-01-16 04:14:34	admin
Service Request	Service Request Playbook	Published	true	2025-01-13 01:17:42	admin
Information Request	Information Request Playbook	Published	true	2025-01-12 18:58:58	admin
Social Benefits Playbook	Social Benefits Playbook	Published	true	2024-10-14 00:08:13	admin

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

The playbook should then show as inactive.

- 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 referring to **sn_gsm_service_request_case** and open it.

Table	Process Definition	Create Record Activity Name	Create Record Form View
Search	Search	Search	Search
sn_gsm_information_request_case	Information Request	Enter request details	PlaybookIntake
sn_gsm_license_permit_case	Licenses/Permits Playbook	Answer eligibility questions	LicensePermitRecordGenerator
sn_complaint_case	Complaint playbook	Gather complaint details	playbook_details
sn_gsm_service_request_case	Service Request	Enter request details	PlaybookEnterRequestDetails

4. Click the link to edit the record.

This record is in the [Service Request Playbook application](#), but [Information Request Playbook](#) is the current application. To edit this record click [here](#). SN Utils] Switch to Service Request Playbook application click [here](#)

Table: Service Request [sn_gsm_service_request_case]	Application: Service Request Playbook
Process Definition: Service Request	Active: <input checked="" type="checkbox"/>
Create Record Activity Name: Enter request details	Order: 0
Create Record Form View: PlaybookEnterRequestDetails	

Template fields

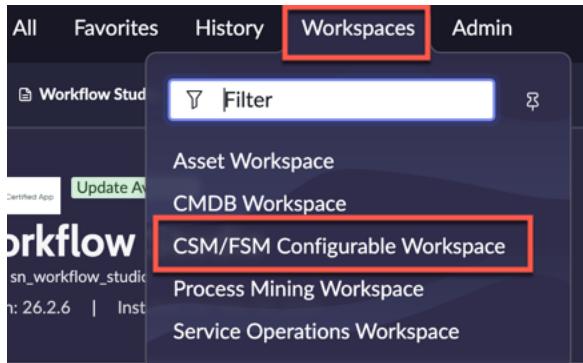
5. In the first column, change Process Definition to Gov Service Request Playbook. Then chose **Update** in the top right.

* Table: Service Request [sn_gsm_service_request_case]

* Process Definition: **Gov Service Request Playbook**

* Create Record Activity Name: Enter request details

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



- 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**.

Number	Short description	Product	Constituent	Business	Business contact	Status
SRC0000001	Need graffiti cleaned from wall	(empty)	(empty)	(empty)	(empty)	Rev
SRC0000002	Missing stop sign near business intersection	(empty)	(empty)	Darwin Travel	Maurice Berry	Rev
SRC0000003	Recycling missed last 2 weeks	(empty)	Derrick Bird	(empty)	(empty)	Inta
SRC0000004	Pothole needs to be fixed	(empty)	Rick Hanson	(empty)	(empty)	Dec
SRC0000005	Stop sign damaged - paint peeling off	(empty)	(empty)	Allied Construction	Robert Belz	Inta
SRC0000006	Hydrant leaking for last 2 days	(empty)	Rick Hanson	(empty)	(empty)	Pro
SRC0000007	Parking meter broken	(empty)	(empty)	Allied Construction	Robert Belz	Pro
SRC0000008	Vehicle left abandoned for past week	(empty)	Derrick Bird	(empty)	(empty)	Pro
SRC0000009	Recycle not picked up last week	(empty)	Shauna Tyler	(empty)	(empty)	Rev
SRC00000010	Illegal flyers outside restaurant	(empty)	(empty)	Import Cargo Group	Curtis Taylor	Pro
SRC00000011	Graffiti from school wall needs to be removed	(empty)	Rick Hanson	(empty)	(empty)	Dec
SRC00000012	Cleaning of Graffiti on school wall	(empty)	Rick Hanson	(empty)	(empty)	Dec
SRC0001006		(empty)	Sam Collins	(empty)	(empty)	Rev

Showing 1-13 of 13

- 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**

Constituent

Location type

Street *

City *

State / Province *

Zip / Postal code *

Country *

Latitude

Longitude

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**.

SRC0001006

Number SRC0001006	Stage Intake	State Draft	Street 2225 Lawson Ln
----------------------	-----------------	----------------	--------------------------

Intake Review Decision

Activities

- Enter request details
- Review Request Details

Location details

Location type

Street *

City *

State / Province *

Zip / Postal code *

Country *

Latitude

Longitude

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

In Progress List

Potential duplicate requests

Number	Short description	Consumer	Updated
SRC0001006		Sam Collins	2025-01
SRC0001003		Sam Collins	2025-01
CMPL00004	Unclean Facility with outdated equipment	Sam Collins	2025-01

Showing 1-3 of 3

Mark Complete **Skip**

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

In Progress Questionnaire

Determine further investigation

Do any potential duplicates require investigation? *

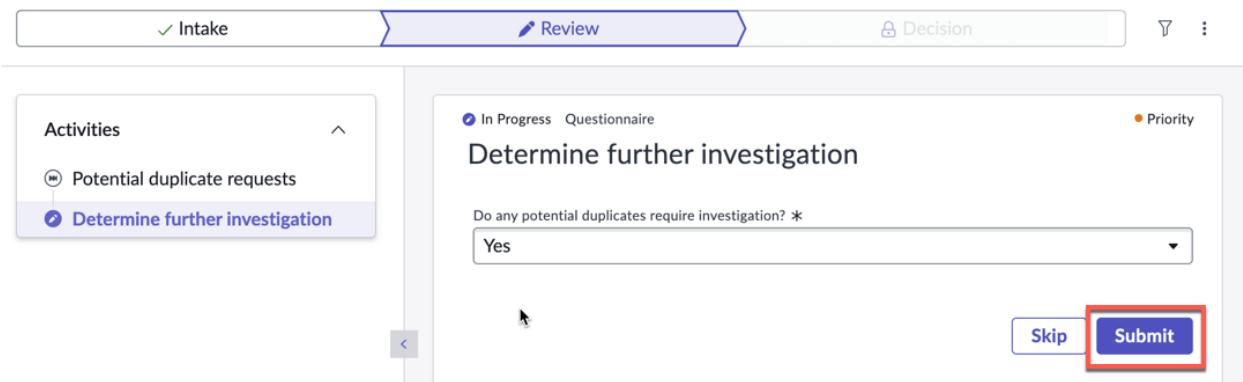
-- None --

✓ -- None --

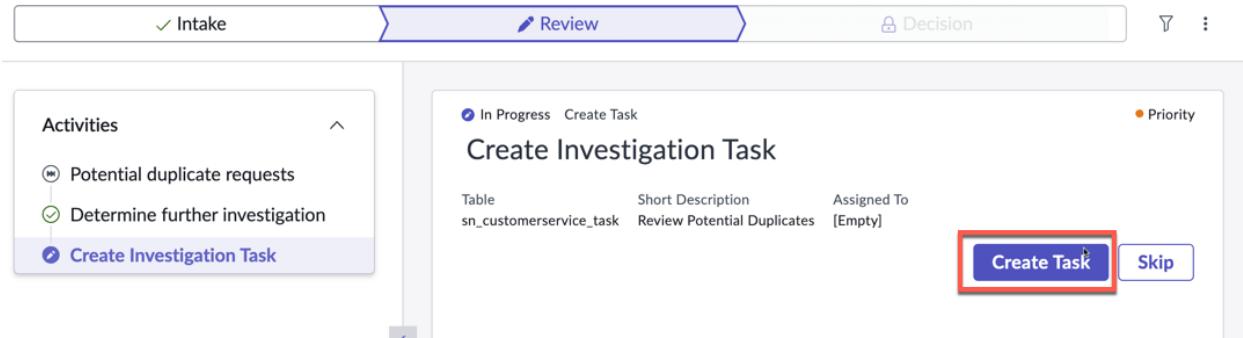
Yes

No

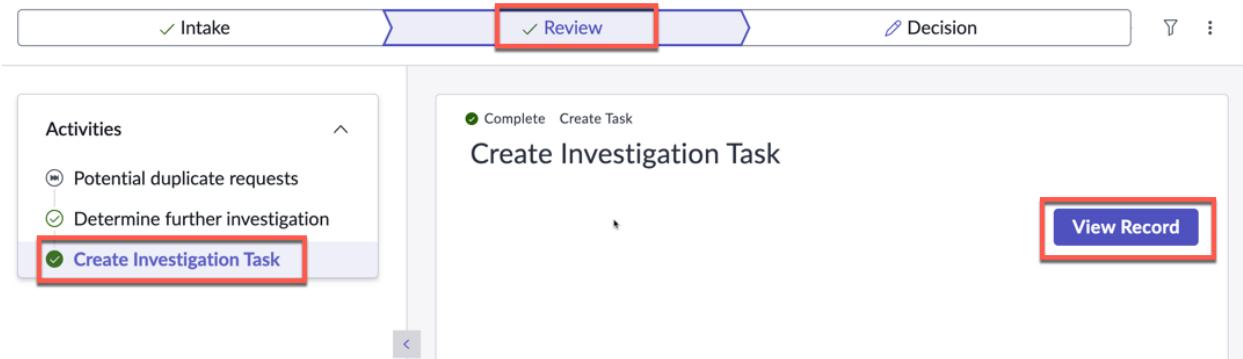
13. Chose **Submit**.



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 intended 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.

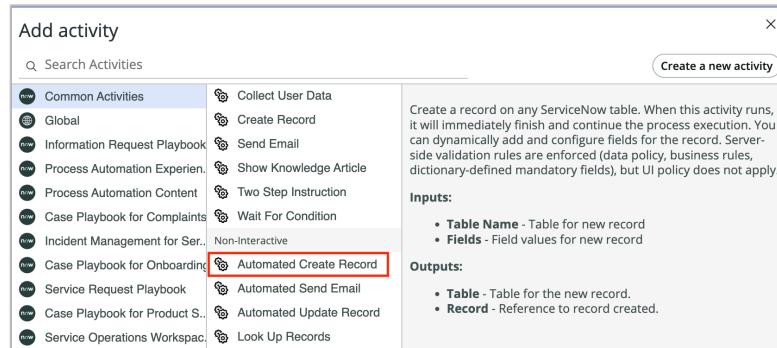
Note: the exercises below assume you are building in an existing process within Workflow Studio.

Lab 3, Exercise 1: Create an Automated Task

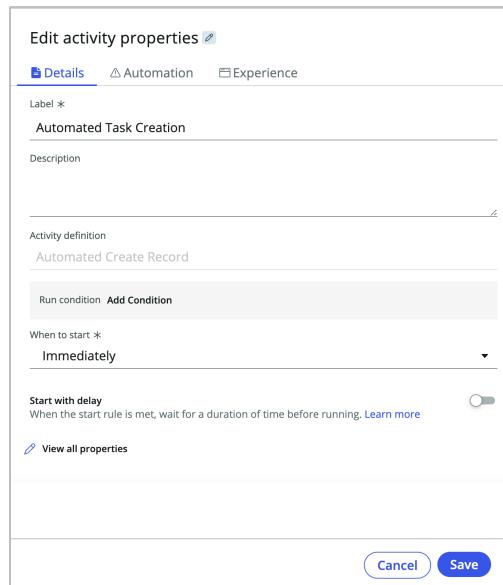
Automated tasks can be used in many ways. You will learn how to create an automated task for the following scenarios:

- 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 be created, select the “**Add Activity**” link.
- 

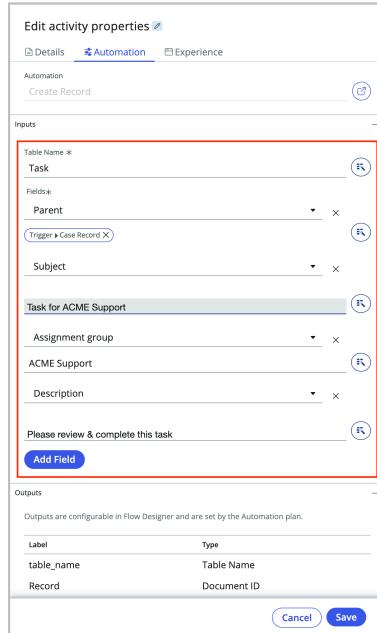
⊕ Add activity
3. Search for the “**Automated Create Record**” under “**Common Activities**” and select it.



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

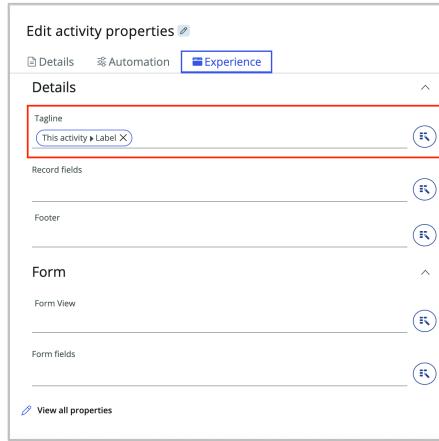


6. Select the **Automation Tab**.
 - i. Table Name : Task (sn_customerservice_task)
 - ii. Select the **Add field** Button and add the following fields:
 1. **Parent** = (Trigger -> Case Record) using the pill picker
 2. **Subject** = Task for ACME Support
 3. **Assignment Group** = ACME Support
 4.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



The screenshot shows the 'Edit activity properties' dialog for a 'Create Record' automation. The 'Automation' tab is selected. In the 'Inputs' section, the 'Table Name' field is set to 'Task'. Under 'Fields', 'Parent' is set to 'Trigger a Case Record' and 'Subject' is set to 'Task for ACME Support'. The 'Assignment group' is 'ACME Support' and the 'Description' is 'Please review & complete this task'. The 'Outputs' section shows 'table_name' as 'Table Name' and 'Record' as 'Document ID'. At the bottom are 'Cancel' and 'Save' buttons.

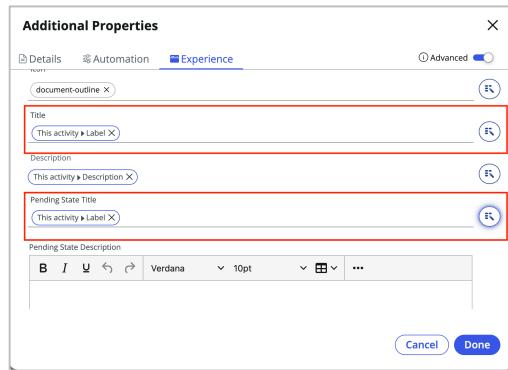
7. Select **Save**.
8. Select the **UI Layout** (image below from prior version).
9. **Delete the Tagline** and change the Tagline by using the Pill picker: This Activity -> **Label**. This will ensure the playbook view shows the label which is more meaningful rather than "Create Record".



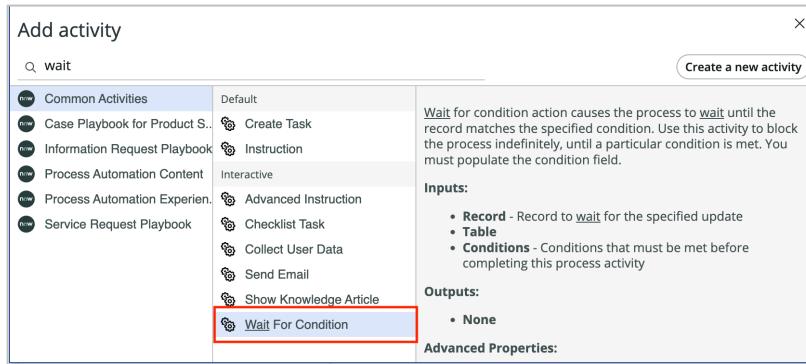
The screenshot shows the 'Edit activity properties' dialog for a 'Create Record' automation. The 'Details' section is expanded. The 'Tagline' field contains 'This activity > Label'. Below it are sections for 'Record fields', 'Footer', and 'Form'. At the bottom is a 'View all properties' link.

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:

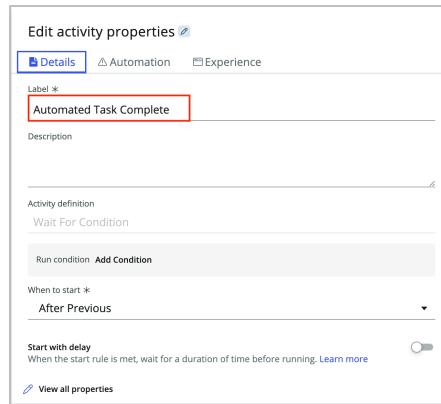
- i. Title : **This Activity → Label**
- ii. Pending State Title : **This Activity → Label**



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:

Edit activity properties 

- [Details](#)
- [Automation](#) 
- [Experience](#)

Automation

Wait For Condition 

Inputs

Record *  

Table 

Task 

Conditions [Edit condition](#)

Outputs

Outputs are configurable in Flow Designer and are set by the Automation plan.

Label	Type
State	Choice

[View all properties](#)

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”.

Edit activity properties 

- [Details](#)
- [Automation](#) 
- [Experience](#) 

Details

Tagline  

Record fields

Footer

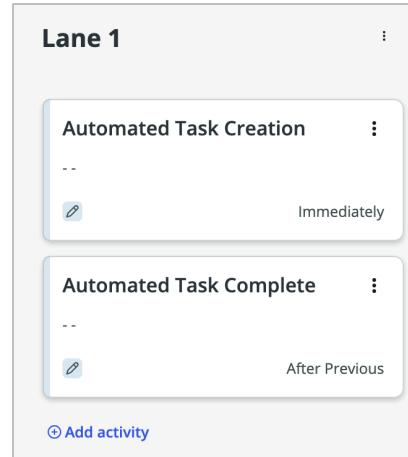
Form

Form View 

Form fields

[View all properties](#)

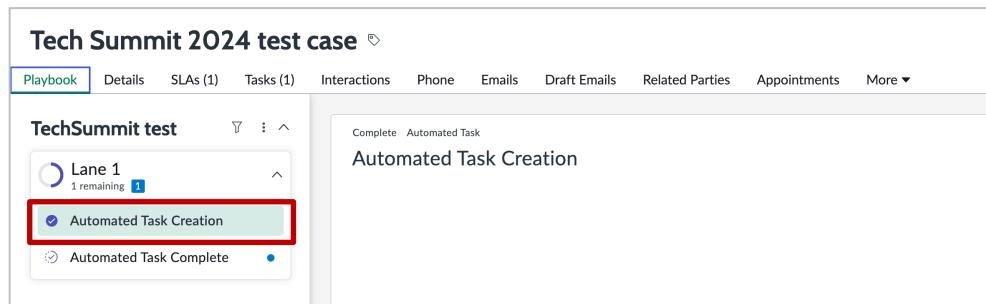
24. Your playbook activities should now look like the diagram below:



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.

The screenshot shows a ServiceNow interface for a "Tech Summit 2024 test case". The top navigation bar includes "Details" and the case ID "CSTASK0010012". Below the navigation is a title bar for "Tech Summit 2024 test case". The main content area has tabs for "Playbook", "Details", "SLAs (1)", "Tasks (1)", "Interactions", "Phone", "Emails", "Draft Emails", "Related Parties", "Appointments", and "More". The "Tasks (1)" tab is selected, showing a list titled "TechSummit test". It contains three items: "Lane 1" (status: Complete), "Automated Task Creation" (status: In Progress), and "Automated Task Complete" (status: In Progress). To the right of the tasks is a panel titled "Automated Task Creation" with the status "Complete - Automated Task".

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

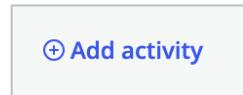
B. Create a Work Order | FSM REQUIRED

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.

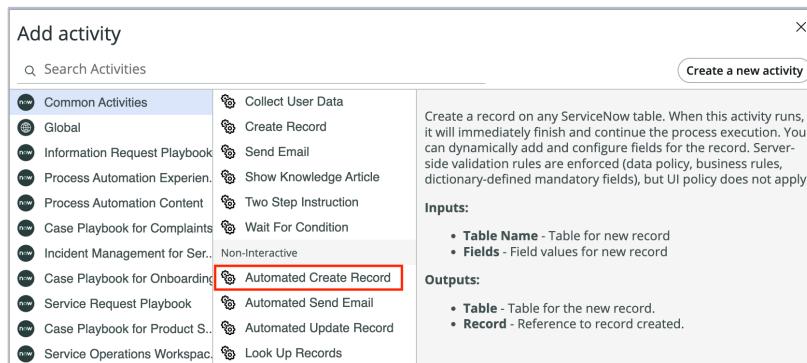
This is a great way to bring CSM, Playbooks and FSM together. Examples are:

- 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**.

Edit activity properties [Edit](#)

Details [Automation](#) [Experience](#)

Label *

Router Maintenance Repair

Description

To generate a work order for a repair

Activity definition

Automated Create Record

Run condition [Add Condition](#)

When to start *

Immediately

[View all properties](#)

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.

1.3 Router Maintenance Repair Properties

[Details](#) [Automation](#) [UI Layout](#)

Table Name *

Work Order



Fields *

Initiated from



[Trigger ▶ Case X](#)



Short description



Router Maintenance Repair



Company



Boxeo



Contact



Julie Lewis



[Add Field](#)

Outputs

Outputs are configurable in Flow Designer and are set by the Automation plan.

Label

Type

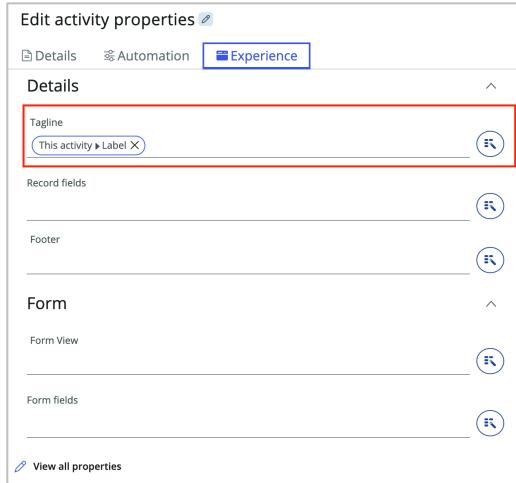
table_name

Table Name

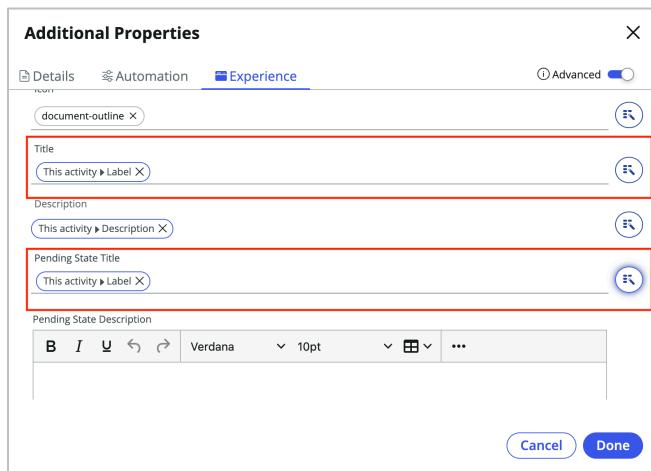
[Cancel](#)

[Save and close](#)

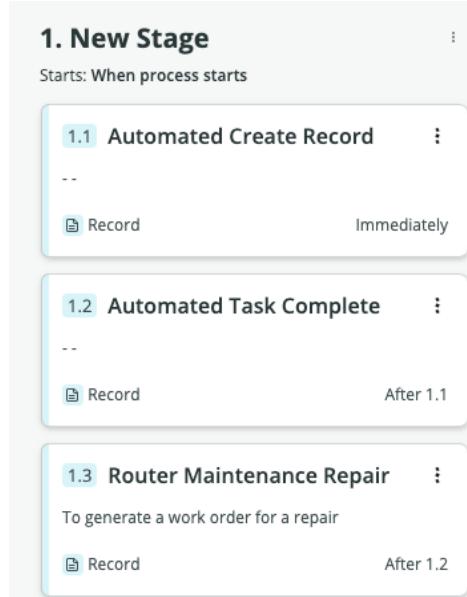
7. Select the **Experience Tab**.
8. **Delete the Tagline** & change the Tagline by using the Pill picker: This Activity -> **Label**. This will ensure the playbook view shows the label which is more meaningful rather than "Create Record".



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**



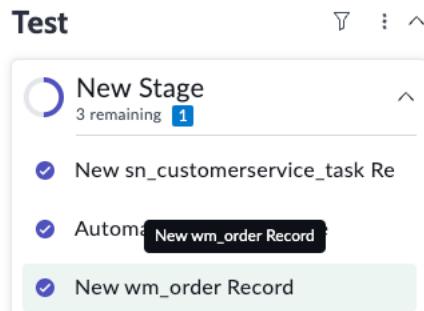
12. Select **Done** and **Save Activity** (if not already done).
13. Your playbook activities should now look like the diagram below:



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.

The screenshot shows a ServiceNow interface for managing work orders. The title bar reads "TechSummit 2024 Work Order test". Below it is a navigation bar with links: Playbook, Details, SLAs (1), Tasks (1), Interactions, Phone, Emails, Draft Emails, Related Parties, and Work Orders (1). The "Work Orders" link is underlined, indicating it is the active page. The main content area is titled "Work Orders" with a count of 1. It includes a sub-header "Last refreshed 1m ago." and a table with the following data:

Number	Priority	State	Short description	Requested due by
WO00100033	4 - Low	Ready For Dispatch	Router Maintenance Repair	

On the right side of the table, there are three small icons: a blue square with a white circle, a blue square with a gear, and a blue square with a 'Y'.

- 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:

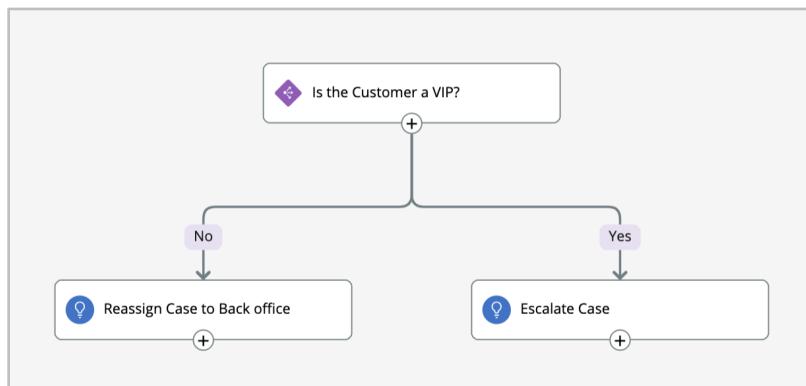
- Improve first contact resolution: Dynamically guide customer service agents along the optimal path to resolve complex cases.
- Shift to digital faster: Author decision trees and guide customer service agents to take the next optimal action.
- Improve customer service agent productivity: Surface contextual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

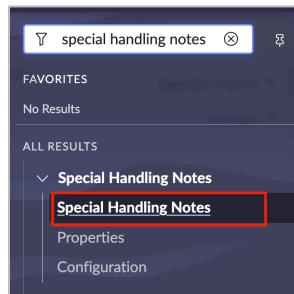
- A. Enable Special Handling Notes for Account BOXEO EMEA.
- B. Create the Decision Tree.
- C. Link the Guided Decision Tree (decision tree & guidance) to the Playbook.

You will build the following Guided Decision:



PART A – Enable Special Handling Notes

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



2. Select **New**

Short Description	Expires on	Priority	Applies To
Account escalated	2131-01-01 07:59:59	● 4 - Low	Case
P1 Incident created for a critical busin...	2024-04-04 04:54:51	● 1 - Critical	Incident

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: 2025-05-31 18:00:00

Related Record: Account "BOXEO".

Click Submit

Special Handling Notes

A batch job evaluates the 'Effective on' and 'Expires on' field values and determines when to display and expire a special handling note. The system administrator can configure the batch job to run at a specific time.

Type: 1 - Standard

Display as pop-up alert:

Priority: 1 - Critical

Status: 1 - Active

Effective immediately:

* Expires on: 2025-05-31 18:13:08

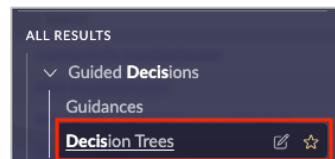
* Related record: Account: Boxeo

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.

Decision Trees				Name	Search	Actions on selected rows...	New
All	Name	Start Node	Description	Domain			
	Search	Search	Search	Search	global	global	global
	Connectivity troubleshooter	Start			global	global	global
	POS Troubleshooter	(empty)			global	global	global
	Review Planned Maintenance Schedule	(empty)			global	global	global
	Right to Work	(empty)			global	global	global
	Test	(empty)			global	global	global
	Troubleshoot Mobile App issue - DH	(empty)	Please verify the customer's Solana secu...		global	global	global
	Unmatched Death Decision	(empty)			global	global	global

3. Create a new Decision tree record:

- a. Name: **VIP Check**
- b. Action Label: **Start**
- c. Select Submit.

* Name Title

* Action Label Description

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.

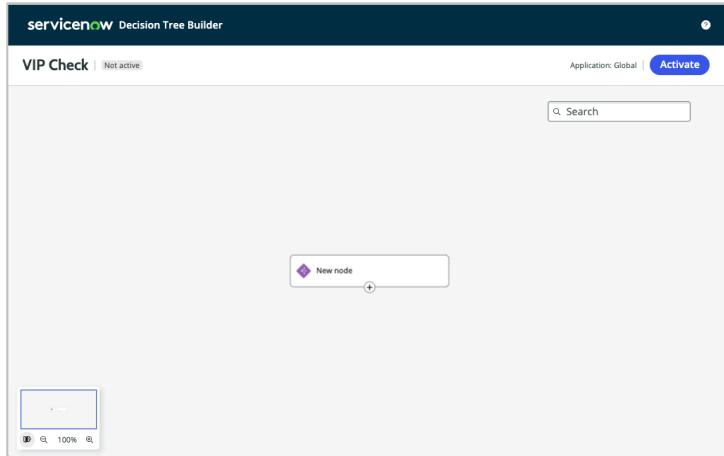
* Name Title

* Action Label Description

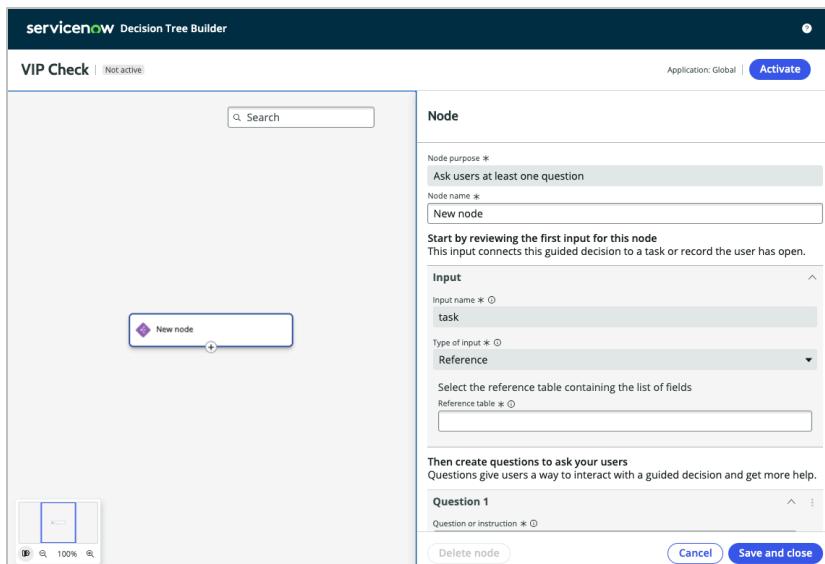
Update **Delete** **Open in Builder**

Related Links [Add to Update Set](#)

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)

Node

Node purpose *

Ask users at least one question

Node name *

Is this customer a VIP?

Start by reviewing the first input for this node
This input connects this guided decision to a task or record the user has open.

Input

Input name * task

Type of input * Reference

Select the reference table containing the list of fields

Reference table * 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**”.

Node

Then create questions to ask your users
Questions give users a way to interact with a guided decision and get more help.

Question 1

Question or instruction * Is this customer a VIP?

Additional details

Required question

Type of answer * Choice

Create a new list of choices or use a pre-defined list from a table

New list Pre-defined list from a table

Use "None" as the first choice in the list

Label *	Value *
Yes	yes
No	no

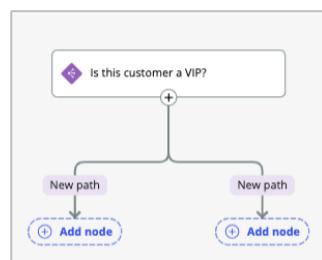
11. Select the **Save and Close** button. Your Node should now look like the image below:



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.

- Path name: **No**
- Path Priority: **100**
- Define the condition for showing the next node: Is this customer a VIP is **No**

Path

Label the path

Path name * ⓘ
No

Path priority * ⓘ
100

Define the condition(s) for showing the next node
A condition is a statement like "Is_the_device_on is true." Define each part next.

Is this... ▾ is ▾ No or and X
+ New condition set

Delete path **Cancel** **Save and close**

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**.

Path

Label the path

Path name * ⓘ
Yes

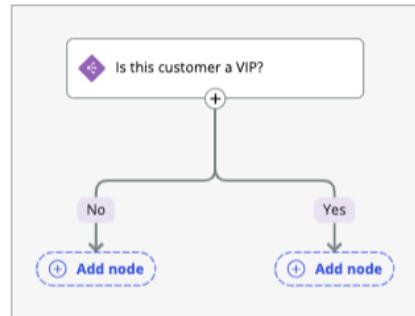
Path priority * ⓘ
200

Define the condition(s) for showing the next node
A condition is a statement like "Is_the_device_on is true." Define each part next.

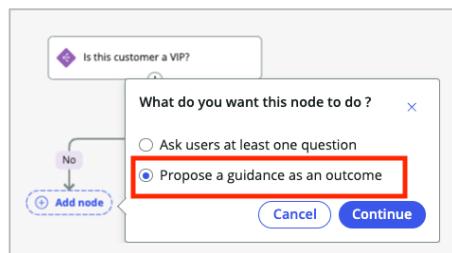
Is this... ▾ is ▾ Yes or and X
+ New condition set

Delete path **Cancel** **Save and close**

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.**

Node

Node purpose *

Propose a guidance as an outcome

Node name *

Reassign Case to Back office

Guidance

Guidance * ⓘ

Reassign case

Set field inputs to pass data into this guidance

Enter a static input or link a dynamic input to pass the field data needed.

Current Case *

Is this customer a VIP? + task X

Set more field inputs to show to users

Enter a static input or link a dynamic input to show as placeholder text in these fields.

Assignment Group

ACME Support

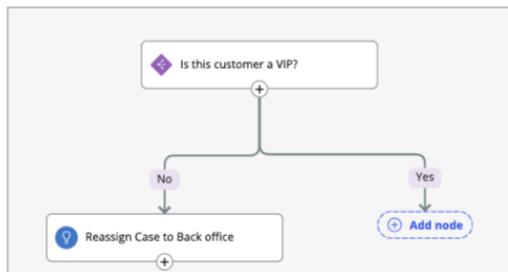
Notes

Assigning to ACME support for further escalation

Review this guidance node

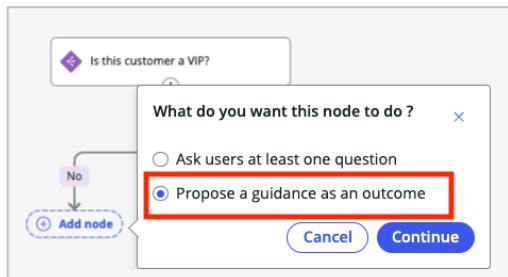
Delete node Cancel Save and close

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*

Guidance Node

Node purpose *

Node name *

Guidance

Guidance * ⓘ

 ⓘ
 +

Set field inputs to pass data into this guidance
Enter a static input or link a dynamic input to pass the field data needed.

Message to be read

ⓘ
 ✎

Current Case *

ⓘ
 ✎

Set more field inputs to show to users
Enter a static input or link a dynamic input to show as placeholder text in these fields.

There are no more field inputs to set
This guidance doesn't have additional inputs.

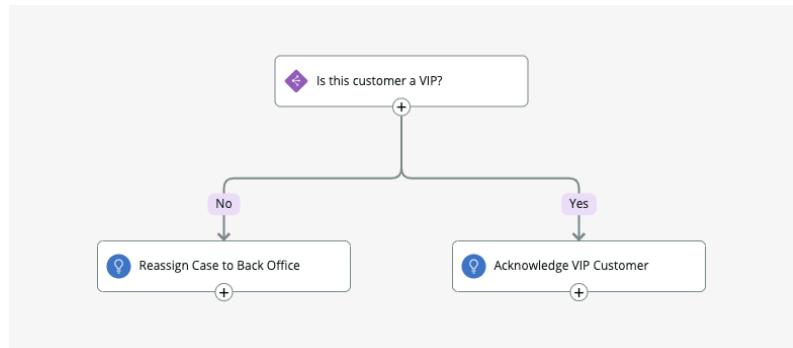
Review this guidance's outputs

There are no outputs to review

[Delete node](#)
[Cancel](#)
Save and close

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

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



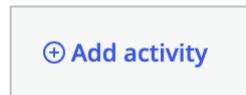
29. Select the **Activate** button at the top-right corner followed by the **Activate now** button which will pop up in the modal.
30. The activation will check for completeness, or any errors made within the decision and highlight them to you. If all is ok, you will receive a message stating “Your guided decision is now active”. Select the **close** button.

The screenshot shows the ServiceNow Decision Tree Builder interface. At the top, it says "servicenow Decision Tree Builder". Below that, it shows "VIP Check | Active". On the right, there's a "Search" bar and an "Activate" button. The main area displays the decision tree with its nodes and branches. The tree starts with the question "Is this customer a VIP?", leading to "Reassign Case to Back Office" if No and "Acknowledge VIP Customer" if Yes. The "Reassign Case to Back Office" node has a small icon of a computer monitor and a progress bar indicating 120% completion.

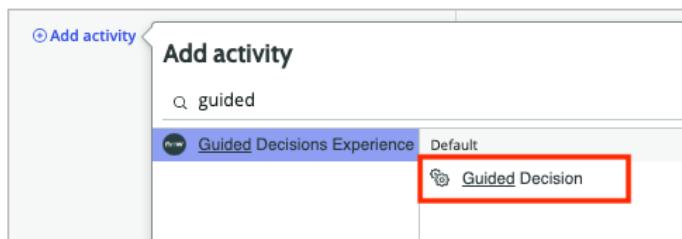
31. The decision tree configuration is now **complete**. The next step is to present the decision tree within a playbook in the next part.

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**.

1.1 Guided Decision Properties

Details Automation UI Layout

Provide a label and brief description for your activity. [Hide additional options](#)

Label *

Check for VIP Status

Description

Activity definition

Guided Decision

Schedule

Start Rule

Define when the system will begin to process your activity. [Learn more](#)

When stage starts

After specific activities

Starts after

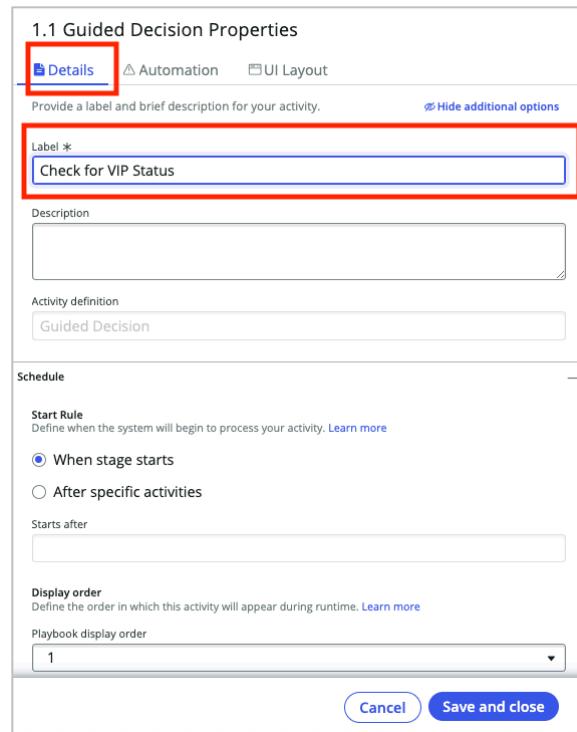
Display order

Define the order in which this activity will appear during runtime. [Learn more](#)

Playbook display order

1

Cancel Save and close

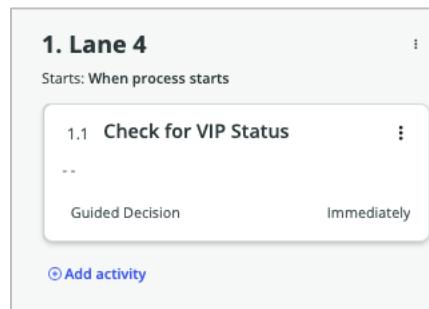


5. Select the **Automation Tab** and populate the Decision Tree field with the decision tree you have just created called "**VIP Check**".

1.1 Guided Decision Properties

<input type="button" value="Details"/>	<input checked="" type="button" value="Automation"/> Automation	<input type="button" value="UI Layout"/>						
Use data inherited from Flow Designer to automate your activity's actions. Learn more Hide additional options								
Automation <input type="text" value="Guided Decisions Automation Plan"/> 								
Inputs Add input data that your activity can use to perform its function in your process. Learn more								
Decision Tree* <input type="text" value="VIP Check"/> ⚠ Missing required fields								
Task * <input type="button" value="Trigger"/> <input type="button" value="Case X"/> 								
Outputs Outputs are configurable in Flow Designer and are set by the Automation plan.								
<table border="1"> <thead> <tr> <th>Label</th> <th>Type</th> </tr> </thead> <tbody> <tr> <td>Result Object Id</td> <td>String</td> </tr> <tr> <td>Result Object</td> <td>Table Name</td> </tr> </tbody> </table>			Label	Type	Result Object Id	String	Result Object	Table Name
Label	Type							
Result Object Id	String							
Result Object	Table Name							
<input type="button" value="Cancel"/> <input type="button" value="Save and close"/>								

6. Select **Save and close**.
7. Activate the Process by clicking on the **Activate** button.
8. Your 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.

The screenshot shows a guided decision titled "VIP Check". The question "Is this customer a VIP?" has two options: "Yes" and "No". The "Yes" option is selected and highlighted with a blue border. Below the options are "Dismiss" and "Next" buttons. The "Next" button is highlighted with a blue background.

- d. Select the option for **No** and click on the **Next** button.
e. The Guided decision then asks you to reassign the case.

The screenshot shows a guided decision titled "VIP Check". A dropdown menu labeled "View my responses" is open. Below it, the section "Reassign case" contains fields for "Assignment Group" (set to "ACME Support") and "Notes" (containing the text "Assigning to ACME Support for further escalation"). At the bottom are "Dismiss", "Back", and "Reassign" buttons, with "Reassign" being highlighted.

- 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 and create another test case, but this time select **Yes** and an Instruction will appear instead. See below.

VIP Check

View my responses

Is this customer a VIP?

Yes

Read message to customer

Dismiss Back Mark as Read

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.

Compose

Comments Work notes (Private)

Type your Comments here

Everyone can see this comment Post Comments

Activity

System Administrator Work notes • 2024-03-18 23:32:54

Thank you for being a VIP Customer! We've got our top agents working on this!

System Administrator Work notes • 2024-03-18 23:31:14

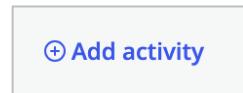
State for case task [CSTASK0010005](#) changed to Closed

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.

Add activity		
<input type="text" value="look up rec"/> Create a new activity		
<input checked="" type="radio"/> Common Activities	<input type="radio"/> Non-interactive Look Up Records	Look up multiple records on any ServiceNow table. You can configure the conditions for the records found. The output includes a list of records and the number of records found. Note: The maximum number of records that can be returned is configured by a property and by default is 10K records. If more than 10K records are found, only the first 10K are returned. Inputs: <ul style="list-style-type: none"> Table - Table for record update Conditions - Condition filter against target table Outputs: <ul style="list-style-type: none"> Record - List of records Count - Count of records returned

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

Edit activity properties

Details Automation Experience

Label *
List of Approvers

Description

Activity definition
Look Up Records

When to start *
Immediately

[View all properties](#)

5. Move to the **Automation tab** and populate the following fields:

- a. Table = **Approval** (sysapproval_approver)

6. Select **Add Condition** and enter the following:

- Approval For = [Trigger → Case Record] using the pill picker.
- Select **Modify** button.



- Select Save.
- Activate** your playbook with the changes just made.
- Now setup an **approval rule**. From the Filter navigator type Approval (System Policy→ Rules → Approval)
- Click **New**
- Populate the following fields:
 - Name: **2024 Approvers**
 - Table: **Case** [`sn_customerservice_case`]
 - Group: **CAB Approval** (This group should have 6 members – just check)
 - Condition: You would normally have conditions set when this approval rule is triggered, but it's not necessary for this exercise.

The screenshot shows the 'Approval Rules - New record' form. The 'Name' field contains 'TechSummit 2024 Approvers'. The 'Table' dropdown is set to 'Case [sn_customerservice_case]'. The 'Group' dropdown is set to 'Application Manager'. The 'Submit' button is visible at the bottom left.

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

Approval Rules - TechSummit 2024 Approvers

Name: TechSummit 2024 Approvers

Table: Case [sn_customerservice_case]

Match conditions: All

Active:

Run rule before:

Conditions: Add Filter Condition, Add "OR" Clause

Script:

14. Select the “Configure Approval Engines”.

15. Find the Table for Case [sn_customerservice_case]

Table	Approval Rules
Request	Turn engines off ✓ Workflows are managing approvals on this table.
Catalog Task	Process Guides ✓
Scan Task	Turn engines off ✓
Service Process Task	Turn engines off ✓
Service Task	Turn engines off ✓ Workflows are managing approvals on this table.
Service Order	Turn engines off ✓ Workflows are managing approvals on this table.
Service Order Task	Turn engines off ✓
Improvement Initiative	Turn engines off ✓
CIM Task	Turn engines off ✓
IP Address Management Task	Turn engines off ✓
Coaching Assessment	Turn engines off ✓
Developer Collaboration Task	Turn engines off ✓
Moderation Task	Turn engines off ✓
Complaint Case	Turn engines off ✓
Case Action Summary	Turn engines off ✓
Post Case Review	Turn engines off ✓
Case Digest	Turn engines off ✓
Claim	Turn engines off ✓
RMA	Turn engines off ✓
Order Task	Turn engines off ✓
Case	Approval Rules ✓
Escalation	Turn engines off ✓
Task	Turn engines off ✓
Deployment Request	Turn engines off ✓
Certificate task(Manual Flow)	Turn engines off ✓
New certificate task	Turn engines off ✓
Renew certificate task	Turn engines off ✓
Revoke certificate task	Turn engines off ✓
Certificate task(Automated Flow)	Turn engines off ✓
Firewall Audit Request	Turn engines off ✓
Firewall Audit Task	Turn engines off ✓
Firewall Rule Task	Turn engines off ✓
Document Task	Turn engines off ✓
Government Service Case	Turn engines off ✓
Information Request	Turn engines off ✓
Agency & Business Service Requests	Turn engines off ✓
Service Request	Turn engines off ✓
HR Case	Turn engines off ✓ Workflows are managing approvals on this table.
HR Benefits Case	Turn engines off ✓
HR Compensation Case	Turn engines off ✓
HR Corporate Communications Cases	Turn engines off ✓
HR Global Mobility Case	Turn engines off ✓
HRIT Operations Case	Turn engines off ✓

16. Select the drop down 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.

The screenshot shows the ServiceNow interface for a case titled "Techsummit 2024 Check Approval". The top navigation bar includes links for Playbook, Details, SLAs (1), Tasks (1), Interactions, Phone, Emails, Draft Emails, Related Parties, Appointments, and More. The main content area displays a "TechSummit test" playbook with three lanes: Lane 1 (Automated Task Creation, 1 remaining), Lane 2 (Automated Task Complete, 1 remaining), and Lane 3 (Complete). A "List of Approvers" card is open, showing a table with three rows for "sysapproval_approvers". The columns are State, Approver, Comments, and Approval for. The rows are: Not Yet Requested (Barbara Hindley, CS0020008), Not Yet Requested (Barton Friesner, CS0020008), and Not Yet Requested (Bart Hachey, CS0020008). There are refresh and settings icons at the top right of the list card.

State	Approver	Comments	Approval for
Not Yet Requested	Barbara Hindley		CS0020008
Not Yet Requested	Barton Friesner		CS0020008
Not Yet Requested	Bart Hachey		CS0020008

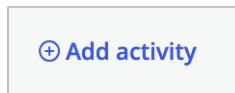
Congratulations, you have configured an approval and displayed it within a playbook!

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.

The screenshot shows a search interface for adding activities. On the left, there's a sidebar with categories like 'Common Activities', 'Global', etc. The main area has a search bar and a 'Create a new activity' button. Below the search bar, a table lists activities. The 'Checklist Task' row is highlighted with a red box. To the right of the table, there's a detailed description of what the Checklist Task does and its inputs and advanced properties.

Add activity															
<input type="text"/> Search Activities Create a new activity															
<table border="1"><thead><tr><th>Category</th><th>Type</th><th>Description</th></tr></thead><tbody><tr><td rowspan="5">Common Activities</td><td>Default</td><td><input type="checkbox"/> Create Task <input type="checkbox"/> Instruction <input type="checkbox"/> Placeholder <input type="checkbox"/> User Form</td></tr><tr><td>Interactive</td><td><input type="checkbox"/> Advanced Instruction <input checked="" type="checkbox"/> Checklist Task <input type="checkbox"/> Collect User Data <input type="checkbox"/> Create Record <input type="checkbox"/> Send Email</td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr><tr><td></td><td></td></tr></tbody></table>		Category	Type	Description	Common Activities	Default	<input type="checkbox"/> Create Task <input type="checkbox"/> Instruction <input type="checkbox"/> Placeholder <input type="checkbox"/> User Form	Interactive	<input type="checkbox"/> Advanced Instruction <input checked="" type="checkbox"/> Checklist Task <input type="checkbox"/> Collect User Data <input type="checkbox"/> Create Record <input type="checkbox"/> Send Email						
Category	Type	Description													
Common Activities	Default	<input type="checkbox"/> Create Task <input type="checkbox"/> Instruction <input type="checkbox"/> Placeholder <input type="checkbox"/> User Form													
	Interactive	<input type="checkbox"/> Advanced Instruction <input checked="" type="checkbox"/> Checklist Task <input type="checkbox"/> Collect User Data <input type="checkbox"/> Create Record <input type="checkbox"/> Send Email													

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**

Checklist Template:>

Document Checklist - Individual Customer



6. Select **Save**.

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.

The screenshot shows the ServiceNow interface within the CSM/FSM Configurable Workspace. A case titled "Unhelpful staff which unable to answer any questions" is open. On the left, a sidebar lists the playbook's steps: Intake, Triage, Research, Respond, Resolve, and Close. The "Checklist Task" step is currently active, displaying a checklist titled "Complete PTSK0001004". The checklist contains five items, all of which are checked: "Social Security number or employer identification number (EIN)", "Personal identification, such as a passport or driver's license", "Proof of Address, such as utilities bill or home lease/loan papers", and "Proof of Income". To the right of the checklist is the "Record Information" panel, which provides details about the case, including its priority (Moderate), state (Open), location (3260 Jay Street, Santa Clara, CA), and consumer (Dee Sam). The consumer panel also shows mobile and business phone numbers and an email address (dee.sam@example.com). A timeline at the bottom of the panel indicates the case was created in 2022.

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