

Creator Studio

Stockholm Summit 2024

Creator Studio – Apps for anyone

Unlock development across the business

Introduction

Overview

ServiceNow Creator Studio offers a curated experience to build simple applications within guard rails on ServiceNow.

Goal

Get a glimpse of how Creator Studio works and be able to create a simple application with a playbook to guide a user working on a task.

Background

You support Jake, a marketing director in your organization. Jake's team is exceeding their goals, and Jake wants to reward them.

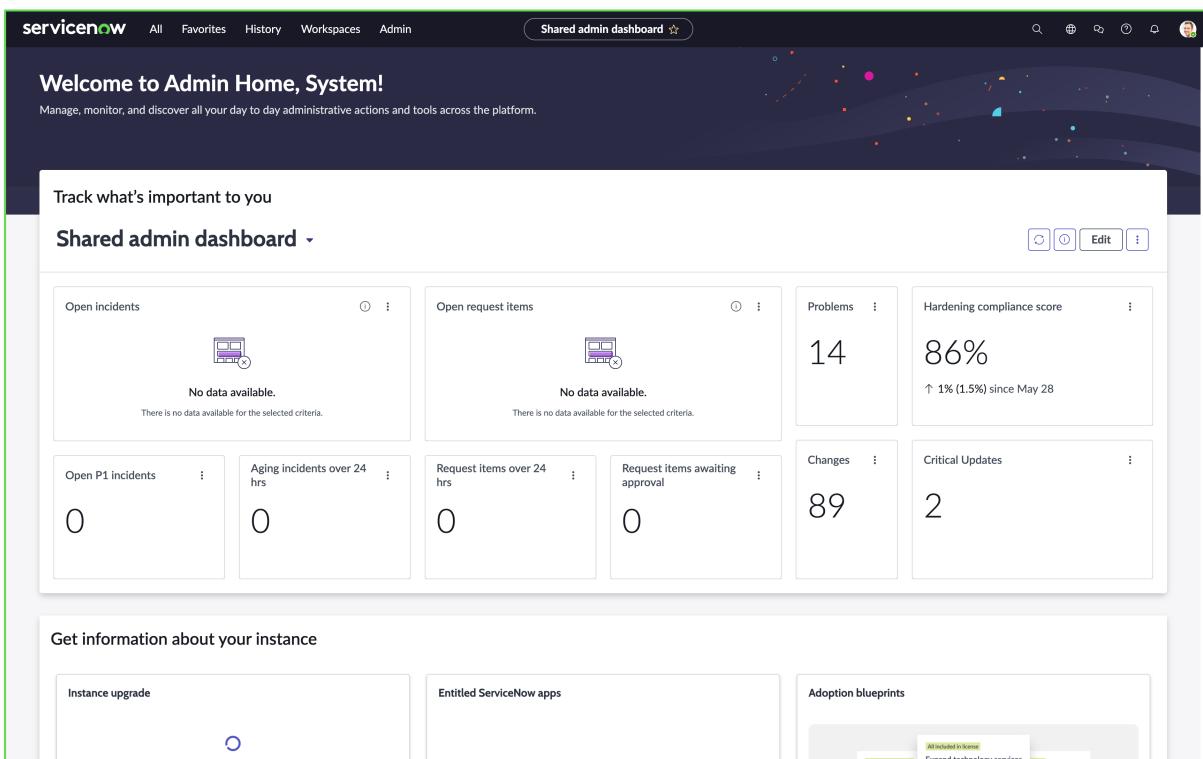
The company has a rewards process where a manager can request one of a number of different approved rewards to their team. The process however, is manual and time consuming today. Jake has asked you to recreate the process on ServiceNow using Creator Studio.

Lab

ServiceNow Instance Access

Log in to your instance using the details provided to you.

The user name is “admin” and you will be playing the role as a platform admin in this exercise. The rest of the login details are provided at your seat.

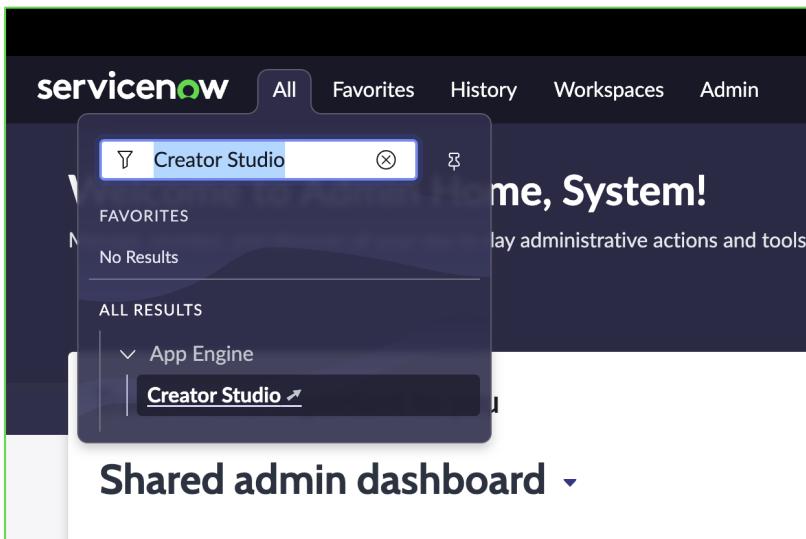


The screenshot shows the ServiceNow Shared admin dashboard. At the top, there's a header bar with the ServiceNow logo, navigation links (All, Favorites, History, Workspaces, Admin), and a search bar. Below the header is a banner titled "Welcome to Admin Home, System!" with a sub-instruction: "Manage, monitor, and discover all your day to day administrative actions and tools across the platform." A main title "Shared admin dashboard" is followed by a star icon and a gear icon. The dashboard features a section titled "Track what's important to you" with four cards: "Open incidents" (No data available), "Open request items" (No data available), "Problems" (14), and "Hardening compliance score" (86%, up 1% since May 28). Below this is another section titled "Get information about your instance" with three cards: "Instance upgrade" (with a progress bar), "Entitled ServiceNow apps" (listing various apps like HR, Finance, etc.), and "Adoption blueprints" (with a callout for "All included in license" and "Expand technology services").

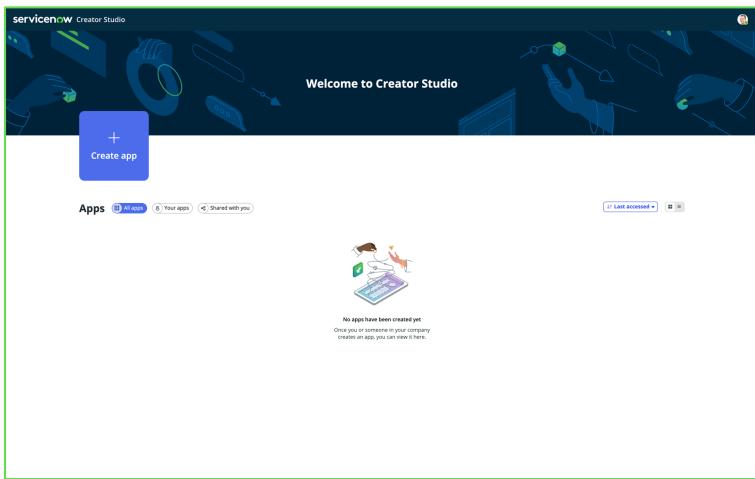
Since the instance you are using is brand new, there will be various “Welcome” and “Get Started” popups throughout – these can be closed or you can click through them.

Access Creator Studio

1. In the top left click the menu **All**
2. Type **Creator Studio**
3. Click **Creator Studio** below under App Engine



Creator Studio will open in a new tab in your browser. Keep them both open.

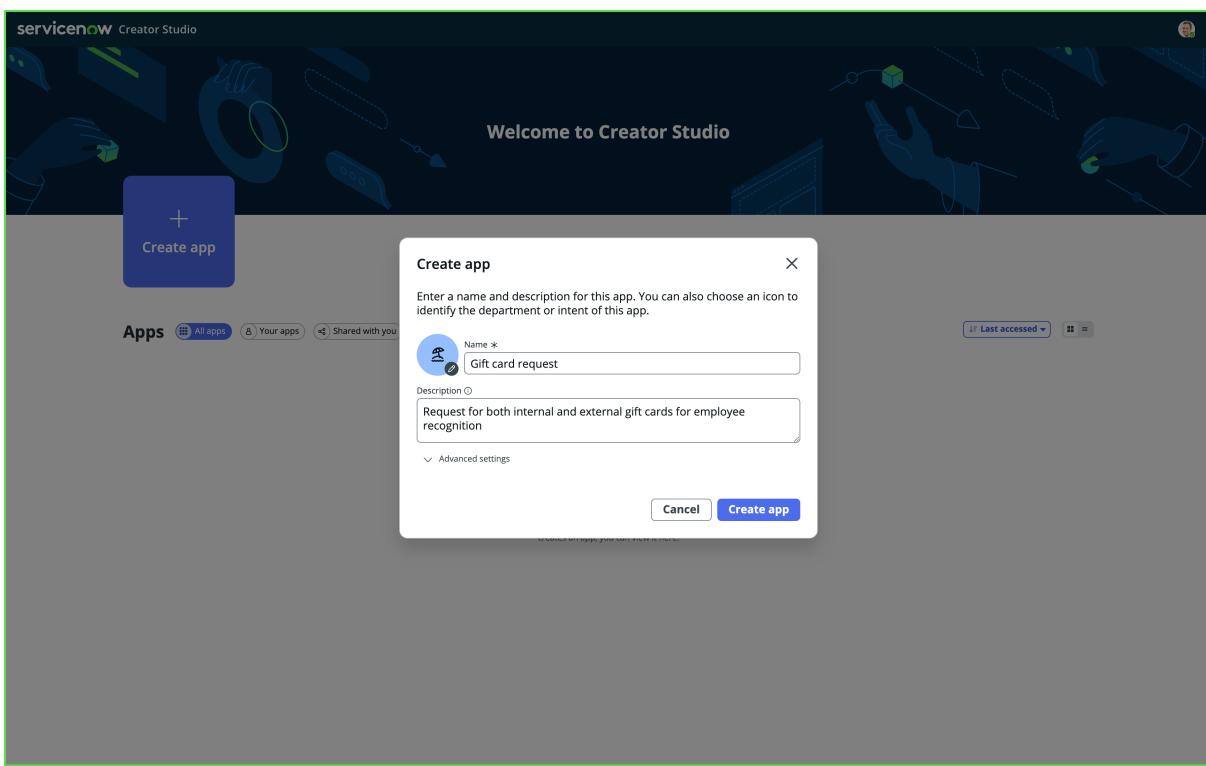


Create your first application in Creator Studio

Let's get started building an application!

4. Click **Create app** and enter the following:
5. Name: **Gift card request**
6. Description: **Request for both internal and external gift cards for employee recognition**
7. Click on **Create app**

Note: This will create a “scope” in ServiceNow that will house all the artifacts of your application. This also allows for easy deployment from Development to Test and then to Production when that time comes.



You can enter whatever you want in the Name and Description boxes, it will not have any functional impact on the Lab.

Choose template

Creator Studio currently comes with one template. "Creator Studio Default Template".

On the left hand you see the available templates, your instance includes two.

On the right hand side, you will see a preview of the chosen template.

8. Click and select **Creator Studio Default Template**
9. Click **Apply this template**

The screenshot shows the 'Choose a template to start' interface. On the left, there's a search bar and a list of available templates. The 'Creator Studio Default Template' is highlighted with a blue border. On the right, a preview window titled 'Untitled' shows three empty text input fields labeled 'Question 1', 'Question 2', and 'Question 3'. Below the preview is a link 'About this template'. At the bottom right of the preview window is a blue button labeled 'Apply this template'.

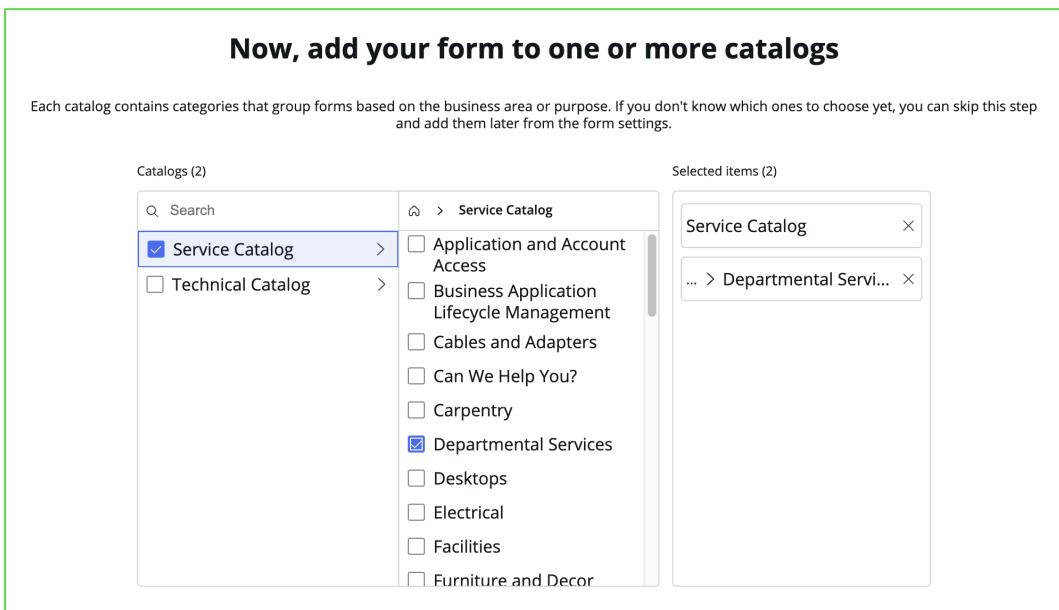
Add your request application to a Service Catalog

You can add the application, or rather, the Catalog Items for your request process, to one or more Service Catalogs and Categories.

For now, we will use “Service Catalog” and the category “Departmental services”



10. Click the arrow next to **Service Catalog** to reveal its categories
11. Check **Departmental Services**
12. Click **Save and continue**



Preview in various experiences

ServiceNow provides various ways to consume its experiences. In this view, you will be able to get a preview of how your request will look in different user interfaces.

You will be able to return to this preview at any time to see your changes.

The screenshot shows the ServiceNow Creator Studio interface. On the left, there's a sidebar titled 'Choose how to preview this experience'. It has two sections: 'As someone requesting something' (with options for Portal, Now Mobile, and Virtual Agent) and 'As someone fulfilling the request' (with options for Submissions and Record). A dropdown menu above the sidebar shows 'Request form Untitled'. On the right, the main area is titled 'Portal preview' with the sub-instruction 'Each form appears in a catalog, and admins add those catalogs to one or many portals.' Below this, there's a preview window containing three text input fields labeled 'Question 1', 'Question 2', and 'Question 3', followed by a 'Submit' button and an 'Add attachments' link. At the bottom right of the preview area, there are 'View' and 'Edit' buttons.

Feel free to explore these views – you can return here at a later point.

13. Click **Edit** to continue

Section Complete

Congratulations, you have now created an application in ServiceNow and you are ready to edit the application.

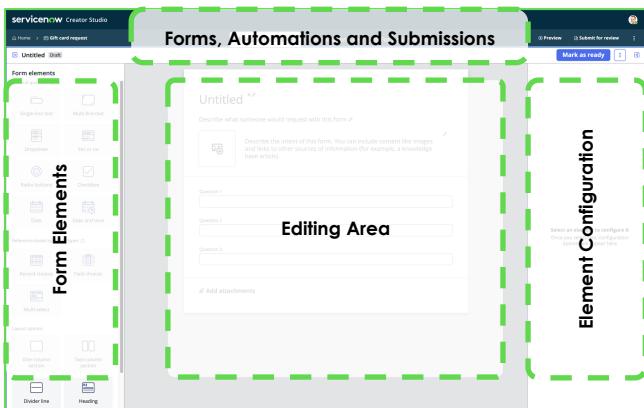
Your next step will be to design the Request Form the user will use to Submit their request in your process.

Design your request form

In this section you will design the request form.

Creator Studio – Edit view

This is the edit view of Creator Studio.



- **Forms, Automations and Submissions**

You can configure three major areas in Creator Studio

- **Forms** – These will be your catalog items, your record producers. This is what your end user will use to start the process, to submit the request.
- **Automations** – This is where you can create a Playbook to guide the process user, the fulfiller, on how to fulfill the request of the user.
- **Form submissions** – This is where you can edit and configure the view the process user will have when they work on a request in the “Request App Workspace”.

On the screen you also see:

- **Form Elements**

- These are the elements you can drag & drop on to the Editing Area. Each element has different capabilities.

- **Editing Area**

- You drag and drop Form Elements on to this area to configure Elements you use to capture information from the user.
- You also name the form (“Untitled” below), give it a description and potentially an image.

- **Element Configuration**

- Each element has different configuration options, this is where you give the elements their Label, Instructions, Type etc.

Edit your request form

Let's start by giving the form a Name and a Description. This information will be used to match what the user searches for in the Service Portal.

14. Click on **Untitled** and change it to **Gift card request**
15. Click on the line below and change it to **Request gift cards for employee recognition**.
16. Now click on the description right of the image place holder, notice you get a rich text editor here. Change the content to:
Looking for a great way to recognize your colleagues? Use this form to request a gift card to our internal company store or to a third party store of your choice! Internal gift cards under \$50 will be automatically approved, all others will go through finance approval.
17. **Optional:** You can click the image place holder and upload an image if you have one.

The screenshot shows the ServiceNow request form editor. At the top, the title "Gift card request" is displayed with a double asterisk icon. Below the title is a placeholder text "Request gift cards for employee recognition". To the left of this placeholder is a small square icon with a plus sign. To the right is a rich text editor toolbar with buttons for bold (B), italic (I), underline (U), left align (L), right align (R), font Verdana, size 10pt, and a more options menu. The main content area contains the placeholder text: "Looking for a great way to recognize your colleagues? Use this form to request a gift card to our internal company store or to a third party store of your choice! Internal gift cards under \$50 will be automatically approved, all others will go through finance approval." Below this, there are three sections labeled "Question 1", "Question 2", and "Question 3", each with a text input field. At the bottom, there is a section labeled "Add attachments" with a small camera icon.

Our next step will be to define the options for the user, and replace the placeholder questions on the bottom half.

Edit the form

18. Click to edit **Question 1** and on the right hand side change the following details

Question label: **Company store gift card?**

Content type: **Yes or no**

Click **Save and close**

19. Click to edit **Question 2** and just like above, change the following details

Question label: **Amount**

Click **Save and close**

20. Click to edit **Question 3**

Question label: **Recipient**

Content type: **Record Choices**

Source table: **User [sys_user]**

Click **Save and close**

Note: for this (20) question, we choose to reference a ServiceNow table.

This gives us the option to dynamically populate a popup with data available in the platform.

21. Add another form element to capture the **Justification**.

With the bottom form element **Recipient** selected – click the **Plus +** that shows up below the form element and choose to add a **Multi-line text** element.

Alternatively, drag and drop a **Multi-line text** element from the Form elements section on the left on to the Edit area.

Give the element a label: **Justification**.

Click **Save and close**

Section Complete

Congratulations, you have now created the form for your application.

Your next step will be to design the processes that takes care of the approval from the requesters manager and the appropriate approval group.

Create a Playbook for Automation

In this section we will create a playbook for automation and design the approval process.

We will create a playbook that runs when the user request a gift card from an external store (when user select NO for the “Company store gift card?” question you created earlier).

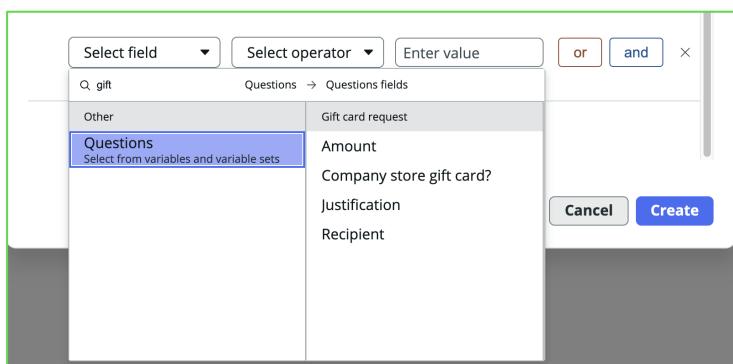
22. Click **Automations** on the top tab section.

23. Click **Create a new playbook** and name it **Approve internal gift cards**

24. In the Create playbook popup, scroll down to **Filter conditions** and click **+ Add conditions**.

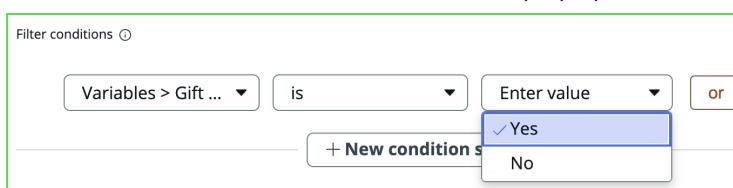
In the **Select field** popup for the filter conditions, click and scroll to the bottom to **Questions**.

You can then either type, next to the magnifying glass, what you're looking for (Hint: gift card) or scroll down to it on the right hand side.



Select **Company store gift card**

25. Next select **is** as a selector in the middle popup and **Yes** in the last (**Enter value**).



Note: Due to a UI-glitch in the Lab instances, you will not see that you selected “Yes” in the last pop up – it will show “Enter value” regardless of what you choose. Don’t worry, your selection is still made.



26. Click **Create!**

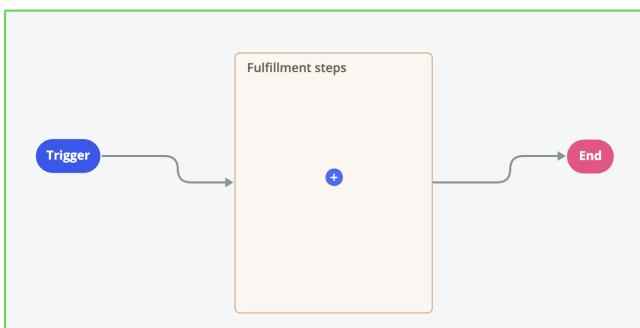
You have now created a Playbook that triggers when it's needed. Our next step is to define the actions we want. The **Fulfillment steps**.

We will now create steps to request approval from the requesters manager

The middle box **Fulfillment steps** will contain your logics.

Since Creator Studio is all about simplicity, the user is limited to one fulfillment step. More advanced playbooks can be built using **Workflow Studio** but, that's for another lab.

Note: When you open a popup in this view to add or configure steps, your work is saved as soon as you click **Save and close** in the popups shown.

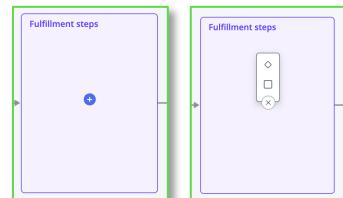


27. Click the **Blue +** to add a new step.

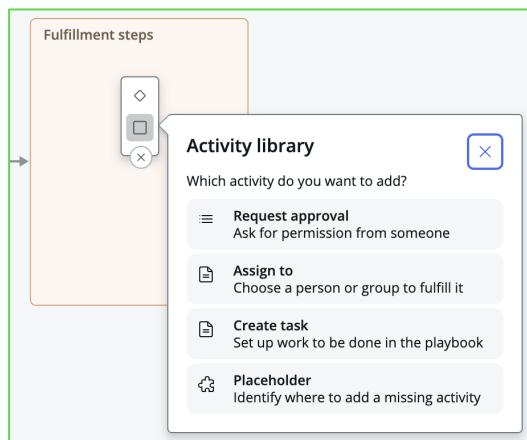
You then get two options.

The top **Romb** symbol creates a **Decision activity** (if/then)

The bottom **Square** symbol adds an activity. Click the bottom **Square** to add an activity.



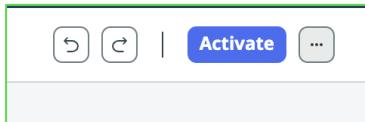
28. In the popup shown, choose to add a **Request approval** activity.



29. In the properties for the **Request approval** activity, update the Name to **Request manager approval** and select the checkbox for **Requestor's manager**.

Click **Save and close**.

30. In the top right of your screen, click **Activate** to make the new Playbook active for all new requests.



1. Request approval Properties

Activity details

Request approval

Name *

Request approval

Description

Select an approver*

Group

Specific person

Requestor's manager

⚠ This activity requires at least one approver

Approval type *

Anyone approves

All approve

Conditions

When to start: *

When playbook starts

After specific activity

Start after

+ Add conditions

Cancel Save and close

Section Complete

Congratulations, you have now created playbook automation for your request.

Next, let's review the workspace used to fulfill the requests.

Review the “Forms submissions” section

For applications created in Creator Studio, there is a common workspace called “Request app workspace”. Process users, fulfillers, use this workspace to work on the tasks created in the various applications created in Creator Studio. Access to a certain process is provided by roles created by Creator Studio.

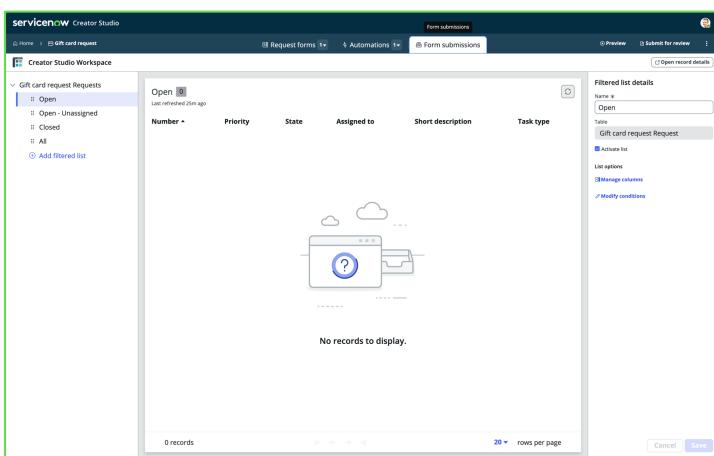
The last part to review and configure is the section for your process in the common Request app workspace.

31. Click **Form submissions** in the top center of Creator Studio.

This view allows you to configure the view your process users will use to work on individual records.

The left hand column provides a few pre-configured list filters for the records and table created for your process. Clicking “Add filtered list” you can add more options for your users.

The center previews the list view and on the right hand side you configure both the selected list from the left column and the shown table columns previewed in the center view.



We will not make any changes to this view in this lab.

Section Complete

Congratulations, you have now reviewed the Workspace for your process.

Now, let's give it a quick try.

Test your application

To test the application and process, we need to view the Catalog Item we created and we will need to test the Workspace.

Test the Catalog Item – Publish it

Go to the “main interface” in ServiceNow – that’s the URL you first entered when you were logging in, the one on the supplied paper.

32. In the **All** menu, type **Catalog Builder** and click in the menu to open it.

This will open a capability in ServiceNow that allows for easy building of catalog items. In here, one can also review catalog items and publish them.

In a “real” scenario, we would actually publish this application and all its components using App Engine Management Center – for complete control of the whole process from Development, via Test to Production.

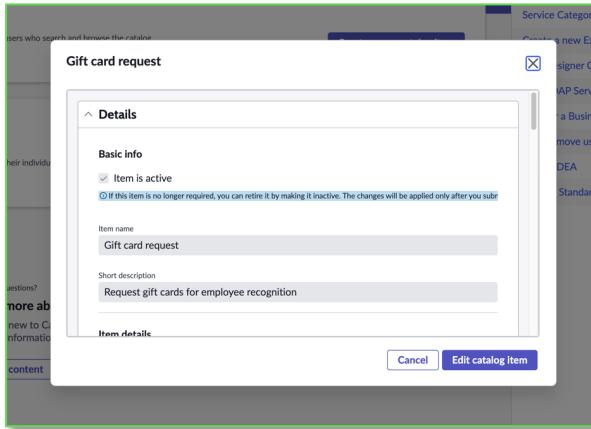
In this lab, we will take a shortcut using **Catalog Builder**.

The screenshot shows the ServiceNow Catalog Builder interface. At the top, there's a navigation bar with links for All, Favorites, History, Workspaces, Admin, and Catalog Builder. Below the navigation is a search bar and a toolbar with various icons. The main area is divided into sections:

- Welcome Area:** Displays a message "Hi System, Welcome to Catalog Builder!" and two buttons: "Start creating your new catalog item" and "Create a new catalog item template".
- Recently Updated Items:** A table listing recently updated catalog items with columns for Name, State, and Updated date. The items listed are: Finance issue (Draft, 2024-06-03 15:54:47), Gift card request (Draft, 2024-06-03 15:42:28), Service Category Request (Published, 2024-05-14 22:29:47), Create a new Export Set (Published, 2024-05-14 22:29:47), Item Designer Category Request (Published, 2024-05-14 22:29:46), New LDAP Server (Published, 2024-05-14 22:29:45), Register a Business Application (Published, 2024-05-14 22:29:36), Add/Remove users from group (Published, 2022-12-05 18:17:33), IntelU IDEA (Published, 2022-12-05 09:50:22), and Retire a Standard Change Template (Published, 2022-11-21 04:46:33).
- Help and Resources:** Includes a "View all" link, a cartoon illustration of a dog, and a "Go to content" button.

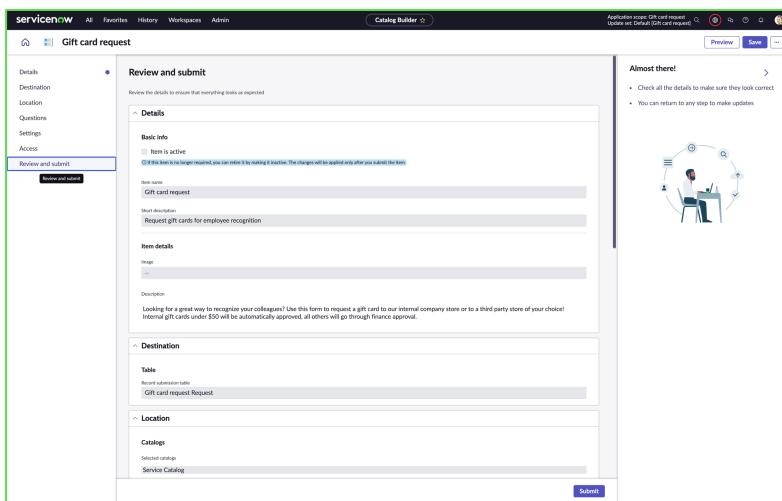
33. On the right hand side under **Recently updated items** find the **Gift card request** catalog item we created and click to open it.

34. Review the item in the dialog box shown.



35. Click **Edit catalog item** to open the item up so that we can review and publish it.

36. Click through the various sections on the left hand side – then click the **Review and submit** section. If you as an admin are happy with the catalog item, click **Submit** in the bottom right.



37. Click **Return to dashboard**.

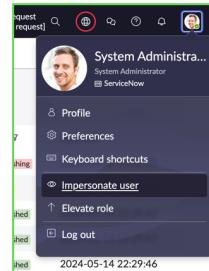
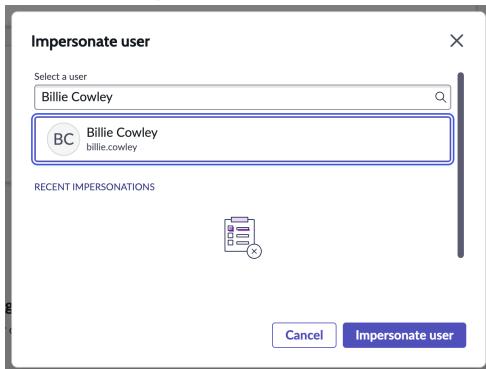
You will now see your catalog item in the stage **Publishing**.

It will soon move to **Published**.

Recently updated items		
Name	State	Updated
Gift card request	Publishing	2024-06-03 16:02:05
Finance issue	Draft	2024-06-03 15:54:47

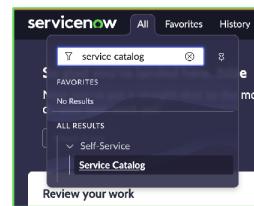
We will now **impersonate** another user, remember we have built this using an admin persona.

38. Click the user profile top right of the screen and choose **Impersonate user**.
39. In the **Impersonate user** box, type and choose to impersonate the user **Billie Cowley** – when selected, click the **Impersonate user** button.

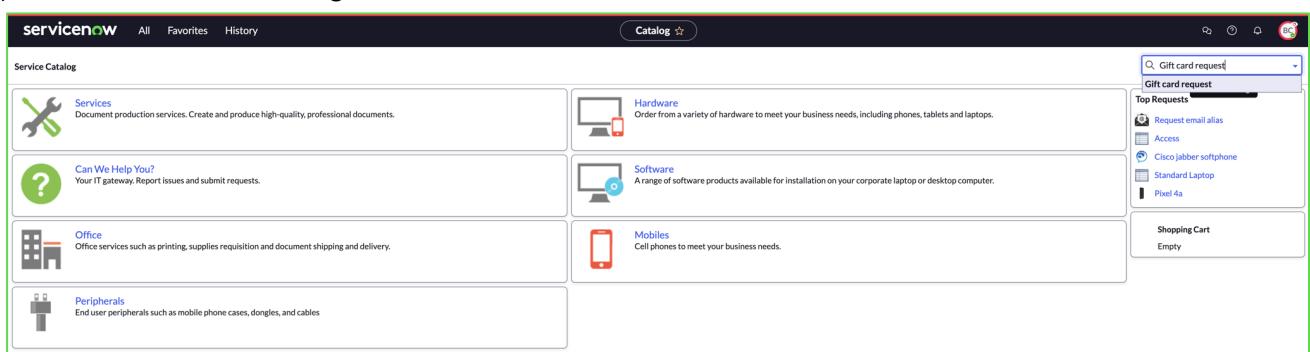


Note: Everything you do from now on will be “as” Billie Cowley.

40. Now, as Billie Cowley – In the **All** menu, type and click to open **Service Catalog** (the quickest way for us to find our catalog item and test it “live”).



41. Once in the service catalog, search for **Gift card request** in the top right part of the service catalog view. Press **Enter** to search.



42. Click the **Gift card request** in the search result.
This will give you the ability to submit a test request, as Billie Cowley.
43. Fill out the form:
* Company store gift card: **Yes**
* Amount: **100**
* Recipient: **Joe Employee**
* Justification: **Well done job!**

The screenshot shows a ServiceNow interface for a 'Gift card request'. The top navigation bar includes 'servicenow', 'All', 'Favorites', 'History', and a search bar labeled 'Gift card request'. Below the search bar, the breadcrumb trail shows 'Service Catalog > Departmental Services > Gift card request'. The main content area is titled 'Request gift cards for employee recognition' with a sub-instruction: 'Looking for a great way to recognize your colleagues? Use this form to request a gift card to our internal company store or to a third party store of your choice! Internal gift cards under \$50 will be automatically approved, all others will go through finance approval.' The form contains several input fields: a dropdown for 'Company store gift card' set to 'Yes', a text input for 'Amount' set to '100', a text input for 'Recipient' set to 'Joe Employee', and a large text area for 'Justification' containing 'Well done job!'. At the bottom right of the form is a blue 'Submit' button.

44. Click **Submit**
45. In the top right user menu, click **BC** (for Billie Cowley) and choose **End impersonation** to go back to your admin persona.

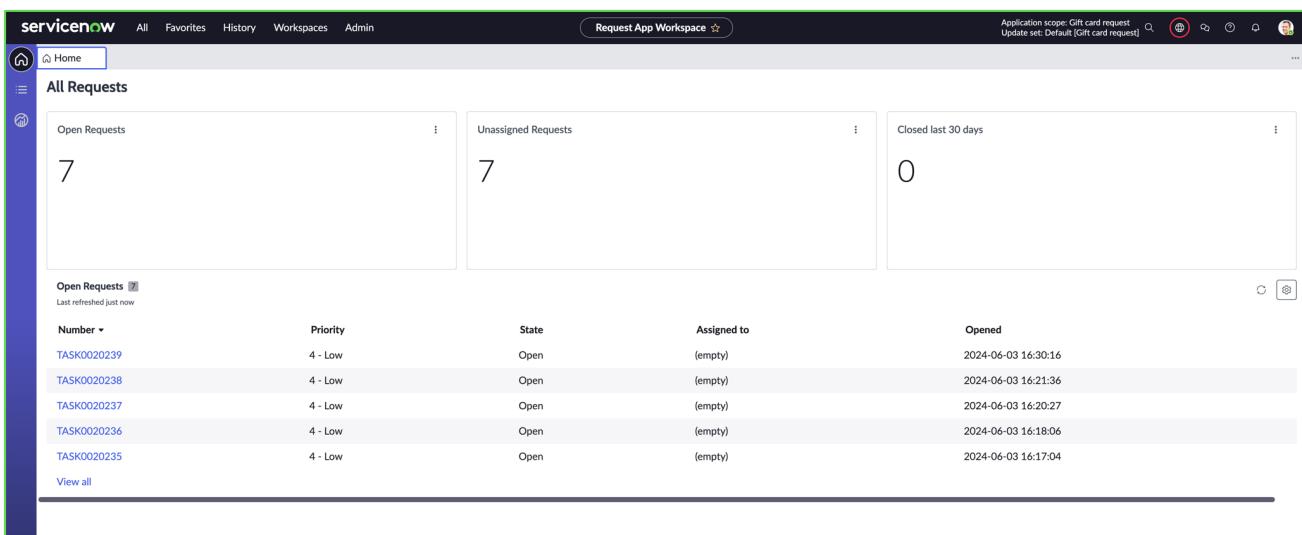
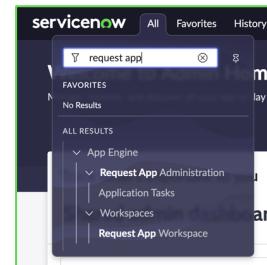
Test the “Request app workspace”

Now back as admin

46. In the All menu, type and click **Request app workspace**

The workspace opens up.

This workspace is a common workspace for all applications built using **Creator Studio**. Access to individual processes built is governed by the roles defined when the application and workflows are created in **Creator Studio**.



Number	Priority	State	Assigned to	Opened
TASK0020239	4 - Low	Open	(empty)	2024-06-03 16:30:16
TASK0020238	4 - Low	Open	(empty)	2024-06-03 16:21:36
TASK0020237	4 - Low	Open	(empty)	2024-06-03 16:20:27
TASK0020236	4 - Low	Open	(empty)	2024-06-03 16:18:06
TASK0020235	4 - Low	Open	(empty)	2024-06-03 16:17:04

As you see, my workspace has a few tasks, yours will likely have only one.

47. Click to view the task Billie Cawley just submitted, in my case it's **TASK0020239** (your number will be different – but check the time stamp and you will see it's the correct one for you).

Field	Value
Priority	4 - Low
State	Open
Comments	Billie Cowley Field changes + 2024-06-03 16:30:16 Impact 3 - Low Priority 4 - Low Opened by Billie Cowley State Open

In here, we can see that Billie created the request (opened by), we can see the various data points she entered before submitting.

We can also see that the approval state of the request is **Requested**.

48. Click the **Approvers** related list near the top of the record and then also the **Automations** related list.

Approver	Comments	Created
Krystle Stika		2024-06-03 16:30:17

Observe that **Krystle Stika** has been assigned an approval of this request. She is the manager of Billie.

The **Automations** related list shows any automation step you build out in the Playbook. Steps here can also be for the process user – the playbook guides the user what to do.

Conclusion

You have now in about 50 minutes created an application in ServiceNow using the new **Creator Studio**.

Your application contains a table to hold your request data, a catalog item for your users to submit their request, an automation to manage approvals and potentially other important steps for the process. Lastly, a workspace for the process users to have an overview of the processes assigned to them.

This completes the Lab

Thank you for your participation!

/Your ServiceNow team

You can read more on all our solutions at
<https://www.servicenow.com/workflows/creator-workflows.html>