knowledge16

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Workflow Design Principles 201

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Workflow 201 Presenters



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Background: NOC/SOC, Security Operations, Operational Perf. Mgr., J2EE Dev

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Workflow 201 Presenters



Solution Consultant

Location: Raleigh, North Carolina

Background: Service Delivery, Service Catalog, CMDB, ITOM







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Agenda

Approval Activities

Simple Approval Workflow

Log Messages, Roll Back Approvals, Record Examination

Tasks from a Workflow

Workflow and the Service Catalog

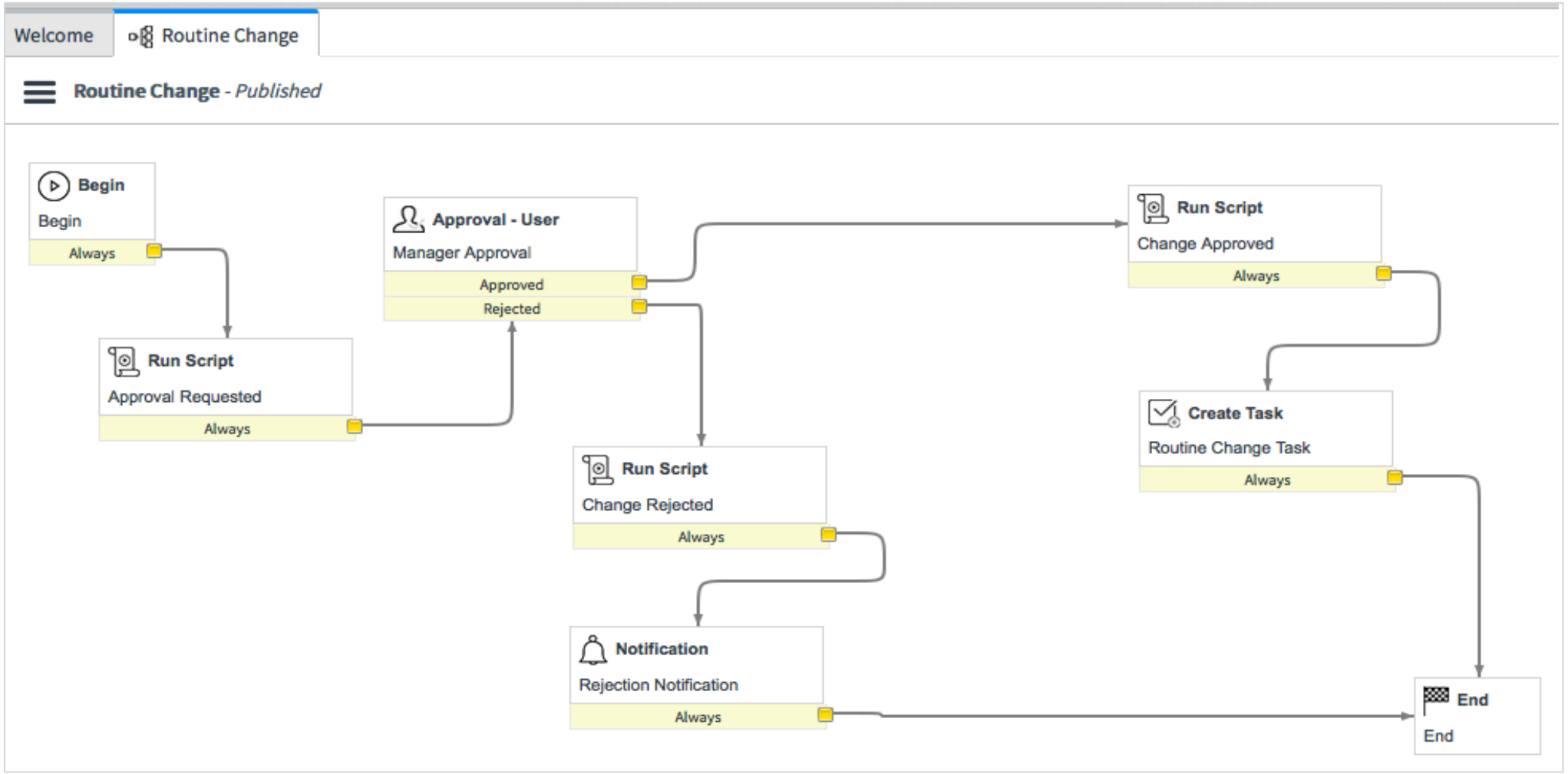
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Approval Activities & Process Automation

- Approval – User
  - Create an Approval record (one or more) for a specific user or one specified dynamically
- Approval – Group
  - Creates a Group Approval and User Approvals for each member of the group
  - Works with the Wait For When and Anyone Reject settings
- Approval Coordinator
  - Gathers Approvals into one Activity, simplifying a workflow
- Approval Action
  - Automatically marks a task as approved or rejected

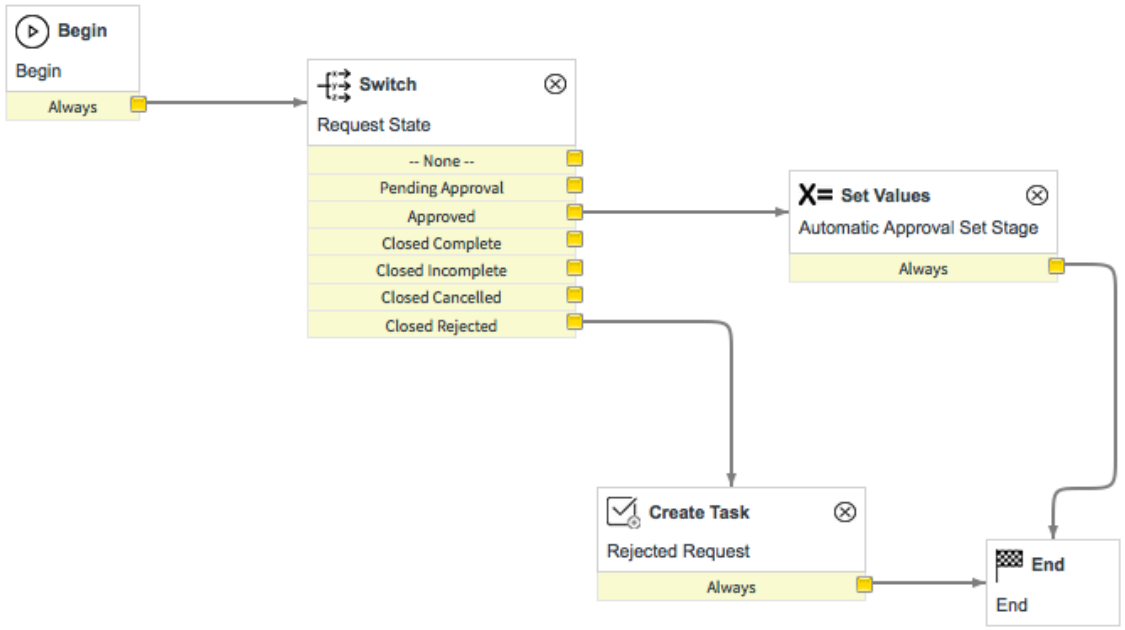
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Routine Change



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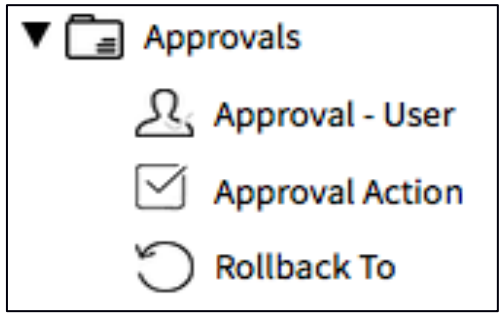
Activity Conditions



- Each Activity has default conditions
  - Yes/No, True/False, Error, Skipped
  - Custom conditions can be added
- Processing continues along transition lines
  - More than one true condition is possible so concurrent processing can start
  - There can be more than one transition for a condition
  - Transitions start from the condition node

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Lab 1 – Simple Approvals in Workflow



Global Approvals



Task-based Table

- In the Simple Knowledge Workflow, use an Approval – User Activity to set approved and rejected processing paths
-
- Play the Workflow using the Workflow Editor and watch the workflow progress
- Add Log Message Activities to verify when the approved and rejected processing paths were followed through the workflow

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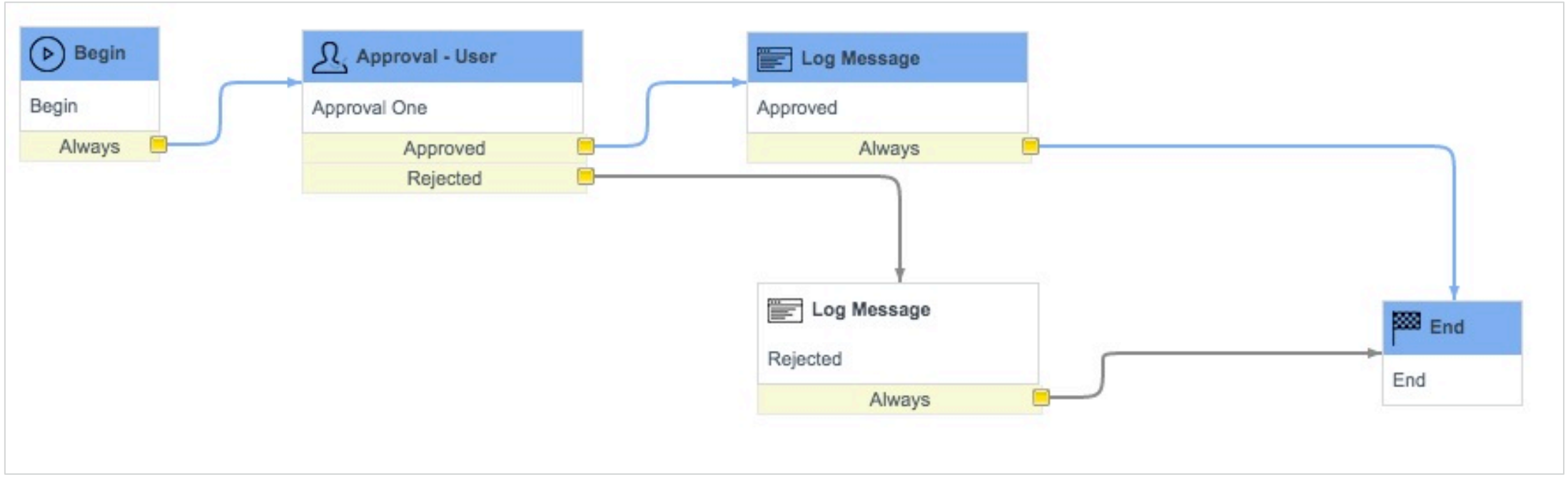
Lab One – Simple Approvals

Questions?

Raise hand to get Guru help

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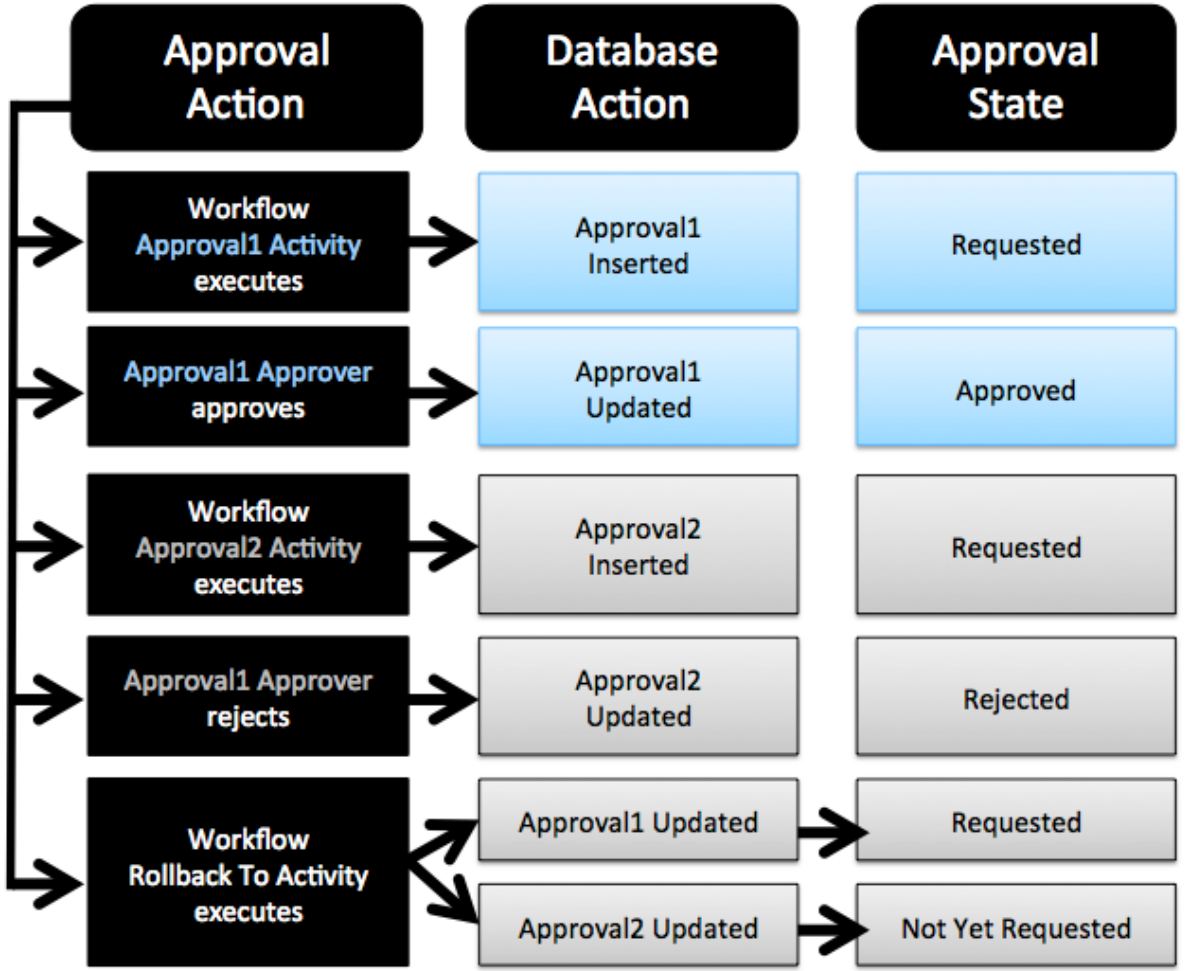
Review Lab 1



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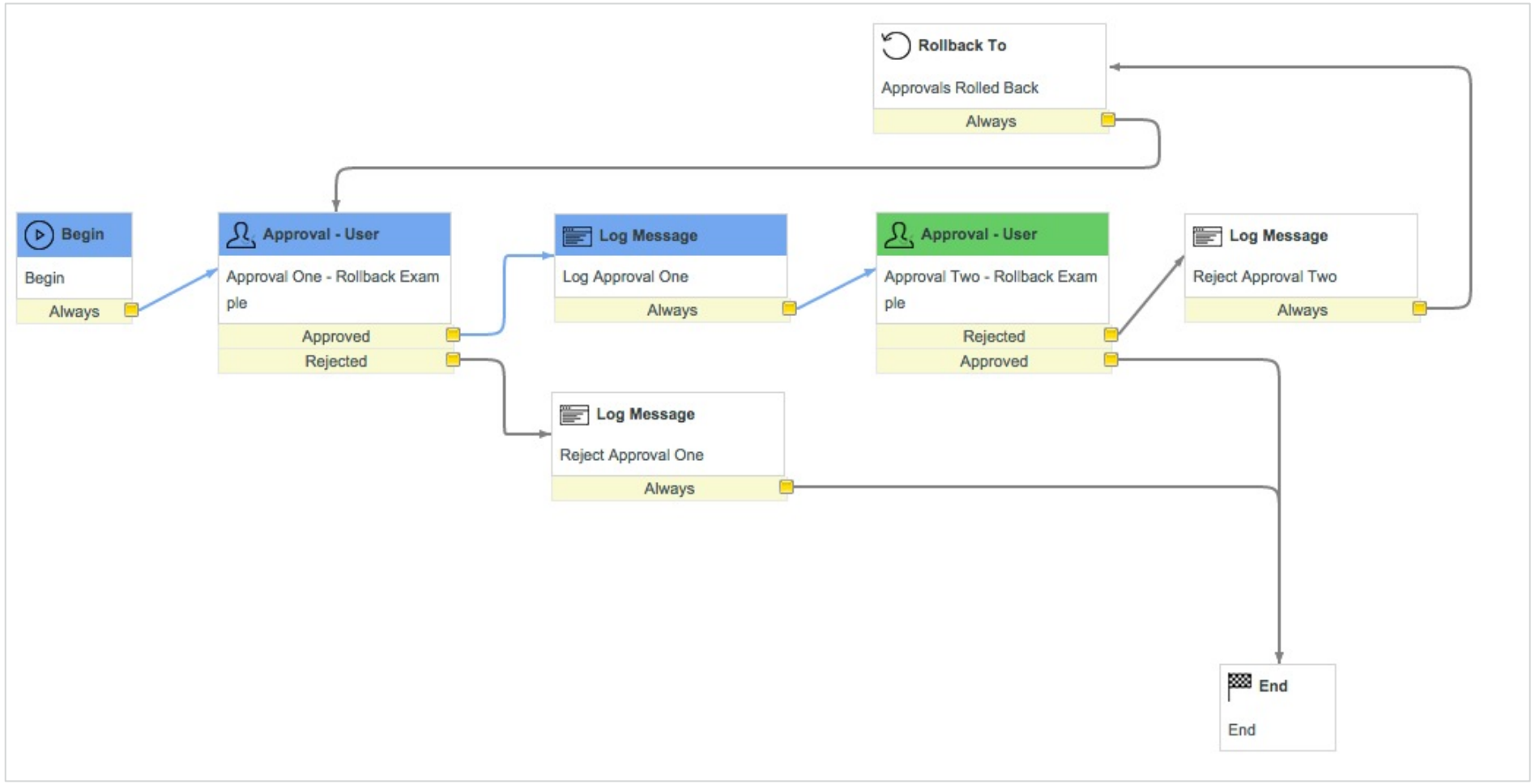
Lab 2 – Roll Back Approvals

- When Activities are Rolled Back, the database transaction varies and the Approval State is reset



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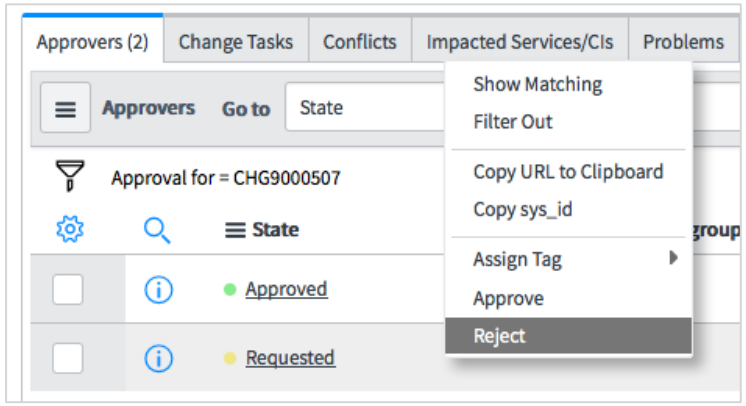
Workflow Context

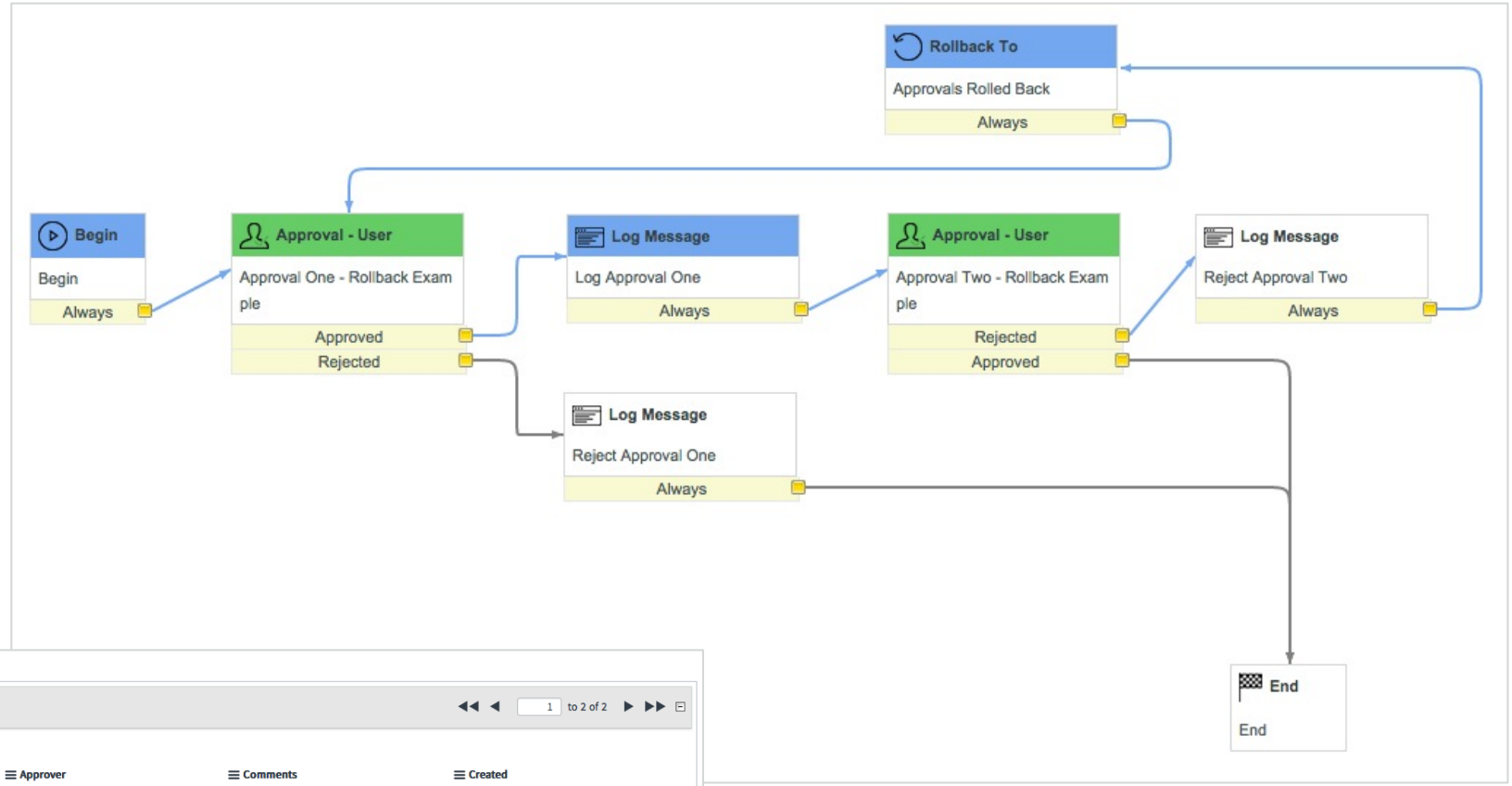


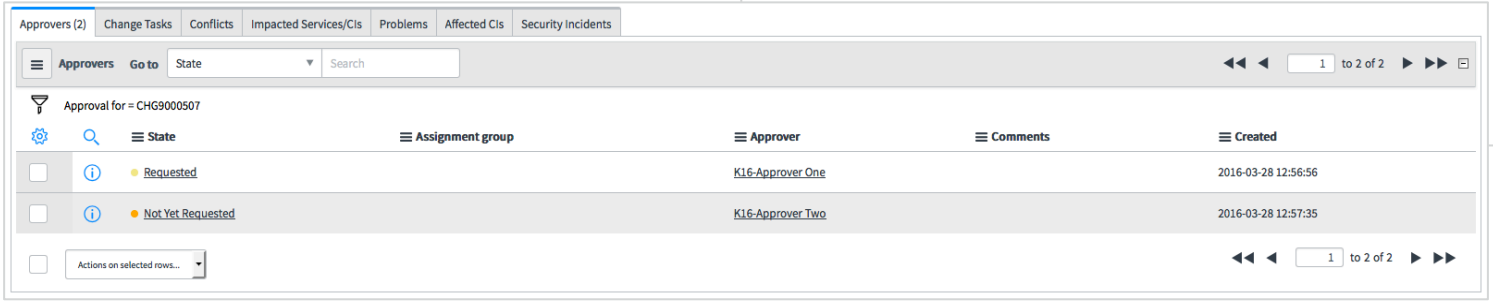
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Workflow Context

After Approval – User Approver Two rejects







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Lab Two – Rollback Approvals

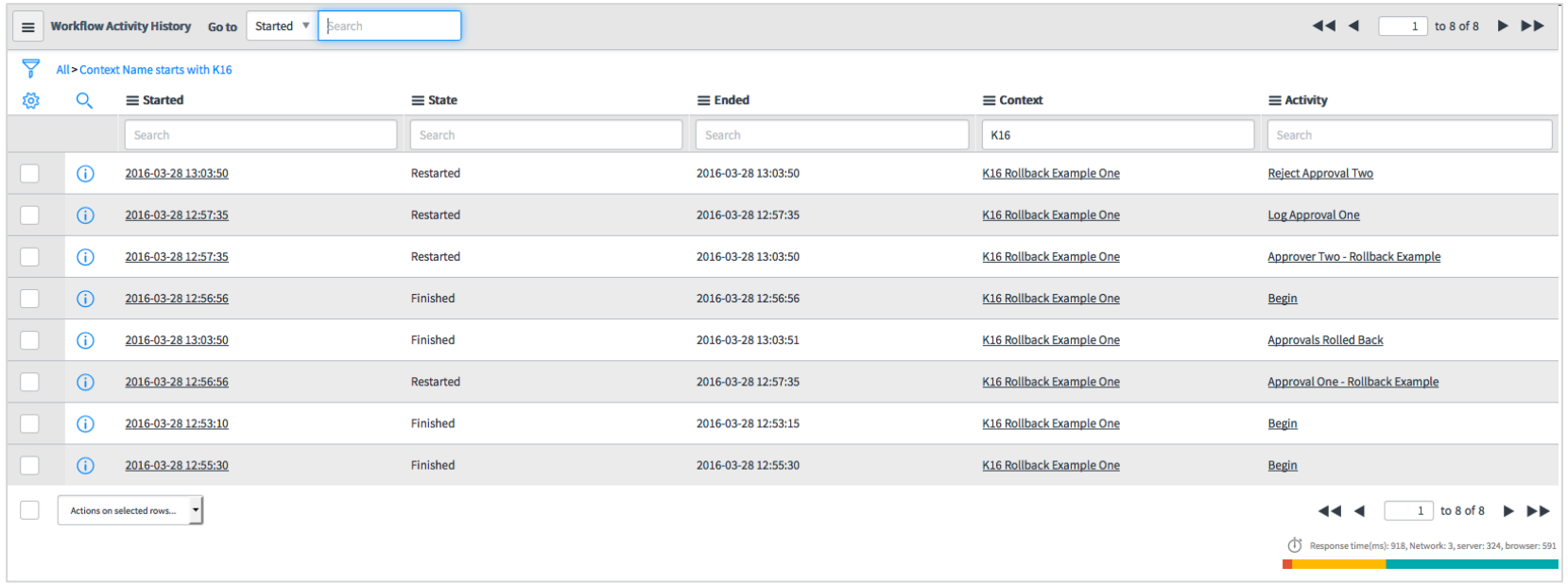
Questions?

Raise hand to get Guru help

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Lab 2 Review QUESTIONS

- Why is the state of K16-Approver Two not Rejected?
- Why is the state of K16-Approver Two not Requested?
- Why is the state of K16-Approver One Requested?



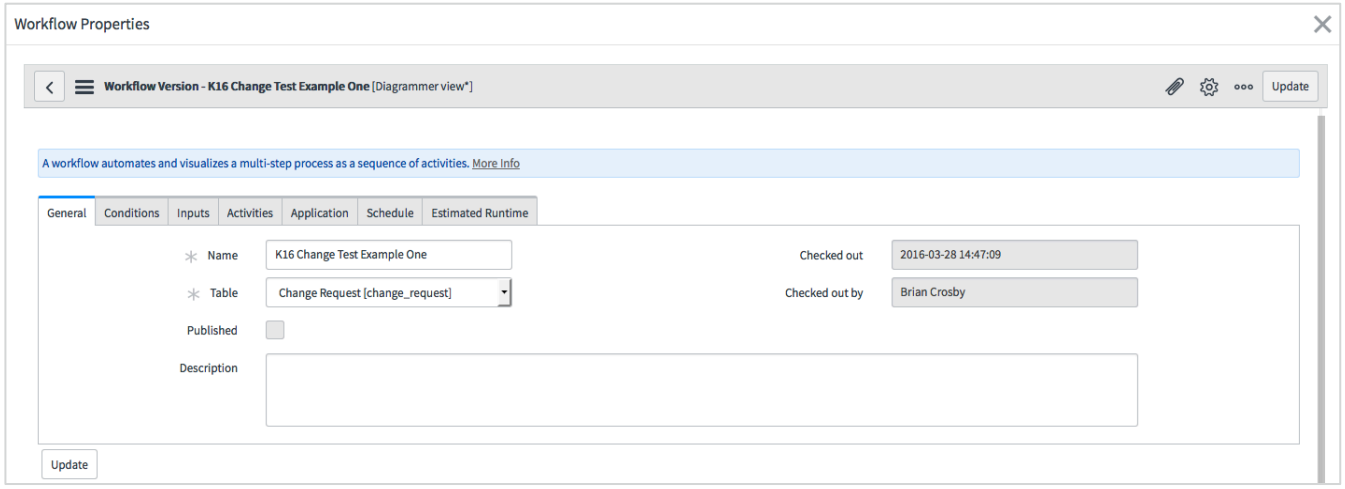
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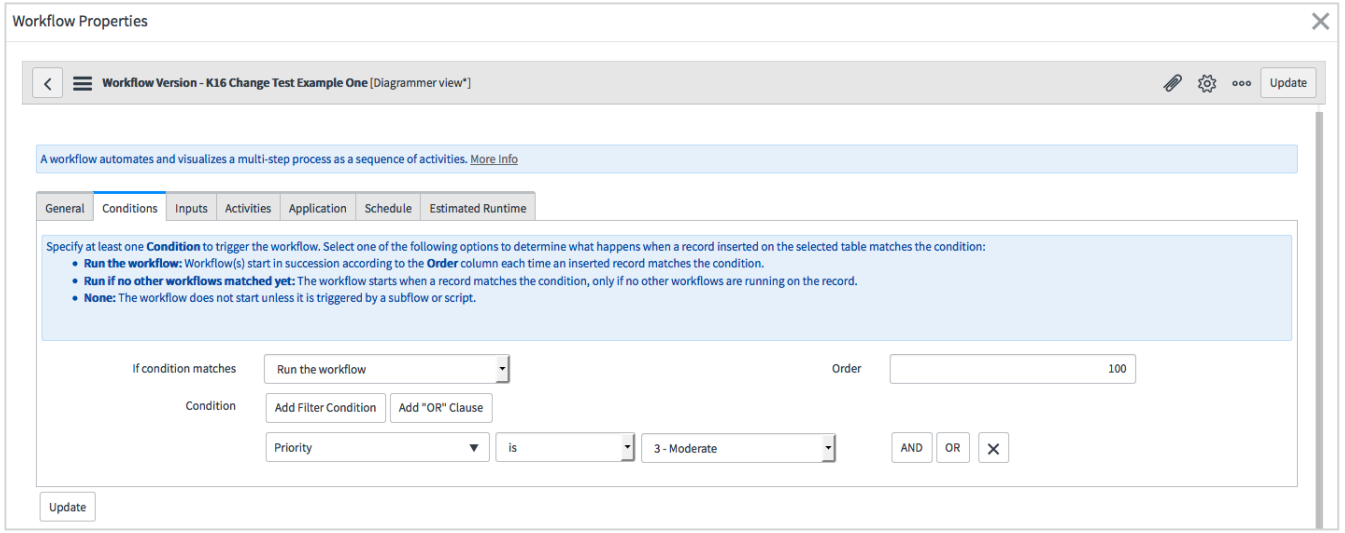
Timeline



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Lab 3 Simple Tasks in Workflow

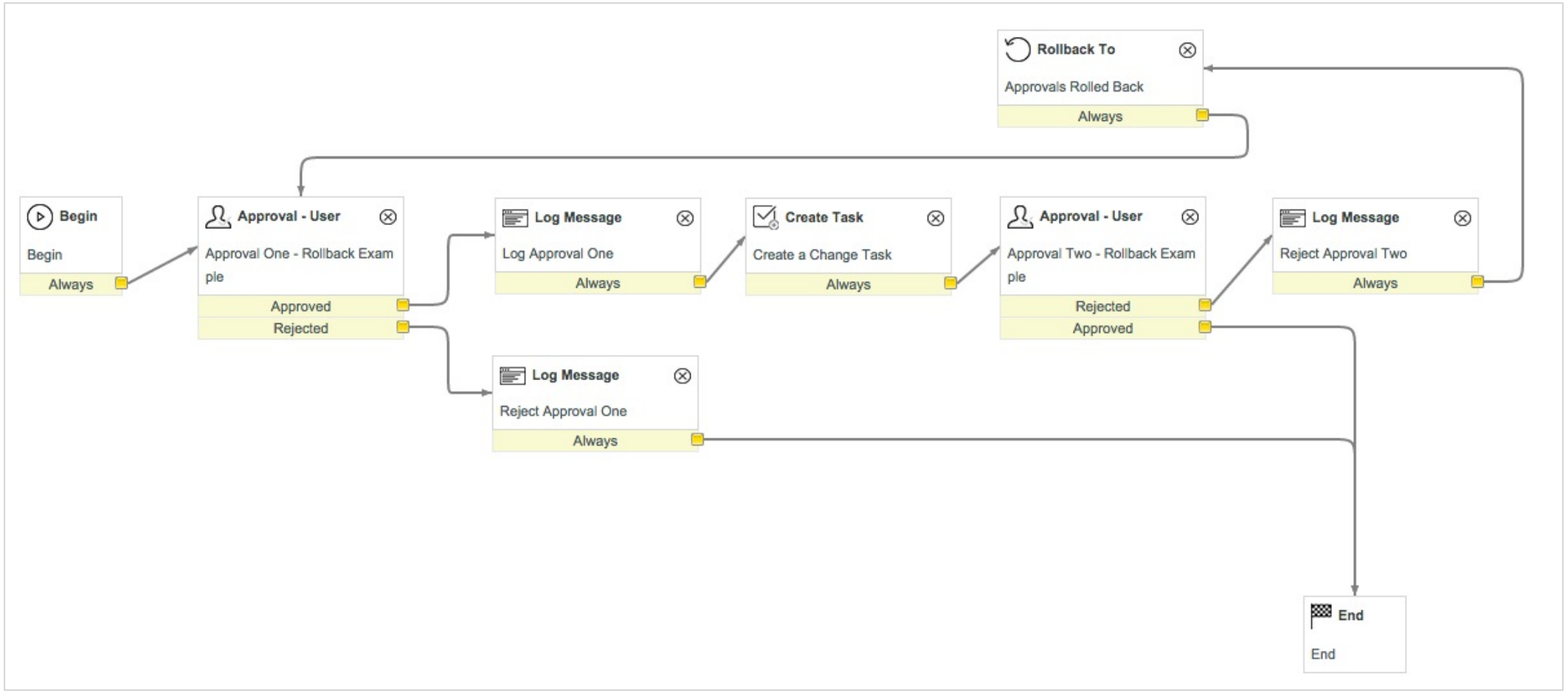




- K16 Change Task Example is associated with the Change Request [change_request] table
  - Executes when the Priority is set to 3
- Workflow Engine creates Tasks and waits for a Complete or Incomplete state to transition
- Follow the flow of Approval and Task records

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Lab 3 – K16 Change Task Example Workflow



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Pop Quiz …

- How Many Approval Activities are there for Task Based Tables?
- Which Activity Type is used to return to a specific point?
- Which Activity would you use to write to the Workflow Process?
- What ServiceNow office(s) are Brian and Ron from?

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Lab Three – Simple Tasks

Questions?

Raise your hand to get Guru help

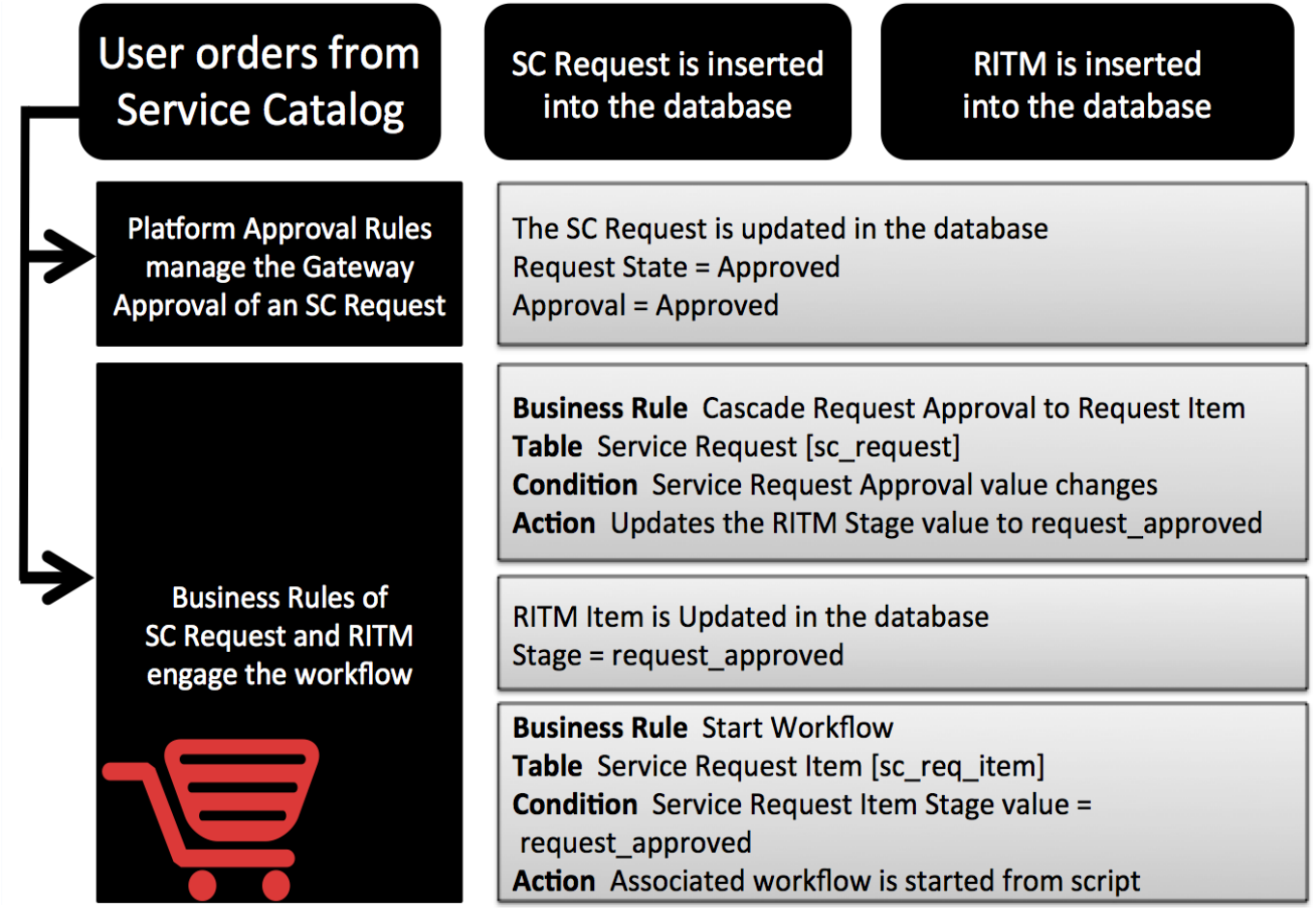
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Review

- How Many Approval Activities are there for Task Based Tables?
- Which Activity Type is used to return to a specific point?
- Which Activity would you use to write to the Workflow Process?
- What ServiceNow office are Shawn and Neal from?

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Lab 4 – Service Catalog & Workflow



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Lab Four – Service Catalog

Questions?

Raise your hand to get Guru help

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Lab 4 – Review

- Service Catalog transactions are managed by Business Rules and the fulfillment of requests is managed by workflow

  CAUTION When changing or adding states to the State field of either (SC Request or SC Request Item) examine the Business Rules and update as needed

- Relationship between a Catalog Item and a Workflow is declared in the Catalog Item Workflow field.
- There is a relationship between the SC variables and workflow variables. You can access the SC variables in the workflow

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Lab 5 – Workflow Stages

- Stages show user the progress through a transaction by using a predefined set of icons
- Designer may assign stages to Activities that represent significant points in the process
- Designer can select the rendering style of the icons
- A Workflow must define the column that will be updated as the transaction progresses

  CAUTION For best results, this field should be read-only to the user and be controlled only by the workflow

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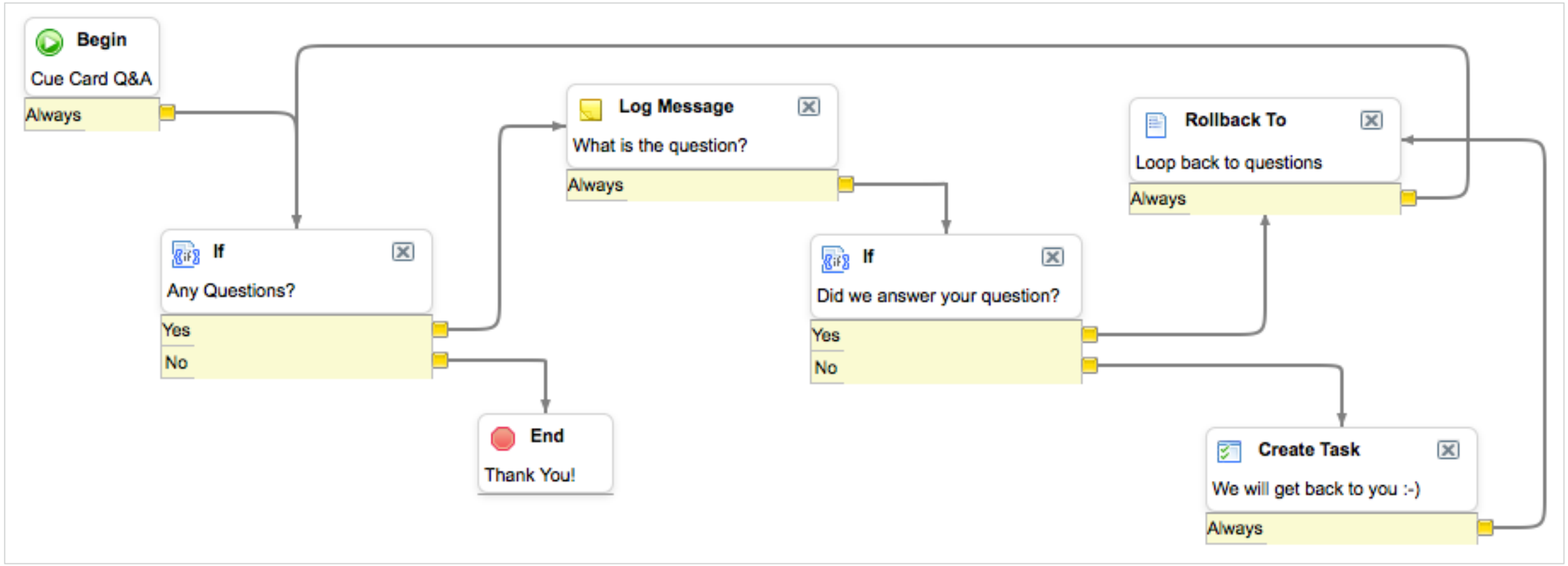
Lab Five – Workflow Stages

Questions?

Raise your hand to get Guru help

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Q&A Process Workflow



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Extra Credit

- Leverage stages, variables, and catalog input(s).
- Come up with scenario where you would need input from a user to successfully complete a workflow.
- As always, flag a Guru down if you have any questions!

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Top Takeaways

1. Workflow Approvals and Tasks can be Rolled Back in reaction to points of failure.

2. Service Catalog is an application run by Business Rules. Workflows are used for fulfillment of SC Request Items.

3. Stages communicate progress to your users.

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