knowledge15
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Catalog 301: Driving a Dynamic User Experience

Austin Buono & Michael Brown

Default Login / Password:

admin / Catalog301

itil / Catalog301

employee / Catalog301

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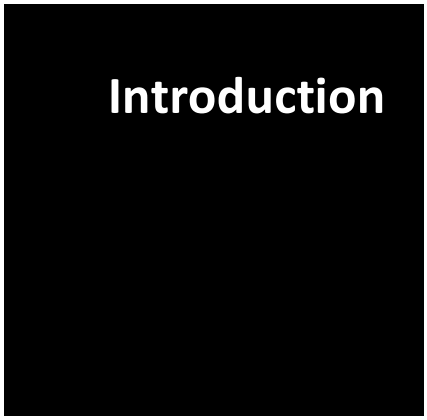
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Introduction



ServiceNow Drives a Dynamic User Experience

There are two parts to every request. Part one is the customer submitting a request. Part two is the work being done to fulfill the request. As an organization, if you can present the right information to fulfillers they can dynamically act on the request and in real time define the outcome of the workflow. Customers also expect to be informed dynamically of this information. Informing customers of the request fulfillment process provides transparency and improves experience.

Savvy leaders view presenting information at the right time to the right audience provides value by eliminating confusion, improving experience and usability.

The ServiceNow Platform facilitates this by incorporating variables at the task level and Custom stages. These pieces of functionality drive interaction and allow an organization the ability to create a dynamic user experience.

Context for Lab

In the following lab you build a custom catalog item and service catalog for a fictitious company called Land-Mark Caring, a large Hospital firm based in the Midwest. Its Hospital Services division is currently in the process of streamlining their medication refill process.

Land-Mark Caring is struggling with managing the current stock of medication and refilling this medication. There are three teams involved in this workflow:

Prescription Procurement—is a team made up of nurses that control the prescriptions throughout the hospital and the order of prescriptions.

Prescription Approval—is the approval group associated to the chosen prescription.

Prescription Restock—is a team made up of nurse's assistants that refill the prescriptions when an order is received.

This fragmented approach meant that previous prescriptions refills required multiple emails. Resolving this request fulfillment process can help the hospital replace inefficient email-based service requests.

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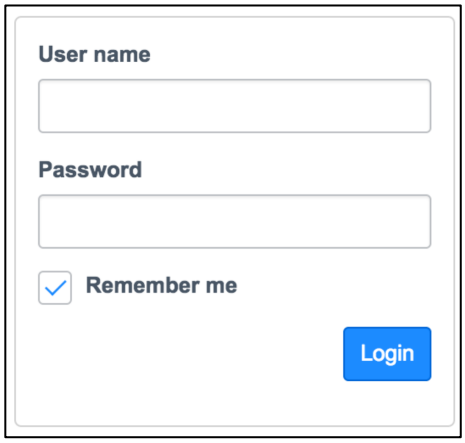
The lab sections below break down pieces of functionality that are used to accomplish requirements given by Land-Mark Caring.

Requirements

1. A task should be generated for the group: **Prescription Procurement**.
    a. This task should confirm with a variable if the prescription is Out of Stock or not.
        i. The customer should not see the variable while ordering, and it should be mandatory on the task.
2. If the prescription is Out of Stock medication must be approved by group associated to the prescription.
3. If the prescription is out of stock: A task should be generated for the group: **Prescription Restock**.
    a. This task should confirm the prescription was restocked.
        i. The customer should not see the question while ordering, and the variable should become mandatory when the state becomes Closed Complete.
4. Inform the customer where the request stands with custom stages.

Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you.



2. Log on with provided credentials.

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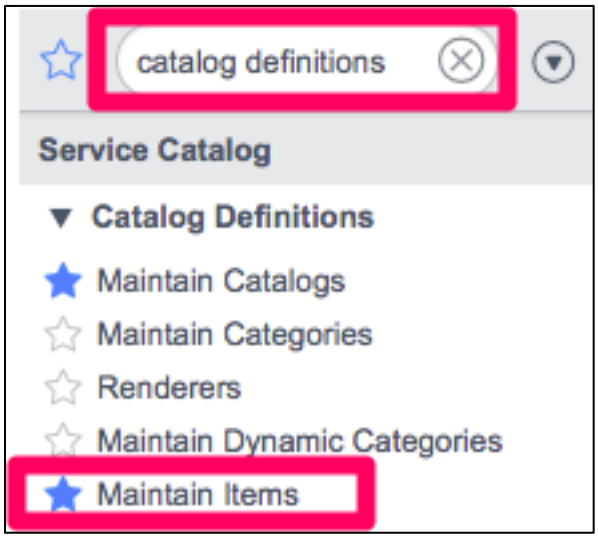
Review of Catalog Item

Lab 1
Review of Catalog Item

This lab session explains how to drive interaction at the task level using variables, UI polices, workflows activities and non-Global variables.

In this first lab, you review the catalog item **Prescription Requests**. This is a custom catalog item specific to Land-Mark Caring, the company wants customized

1. Navigate to **Catalog Definitions > Maintain Items**.



2. Select Catalog Item **Prescription Requests**.
3. Select **Try It**.

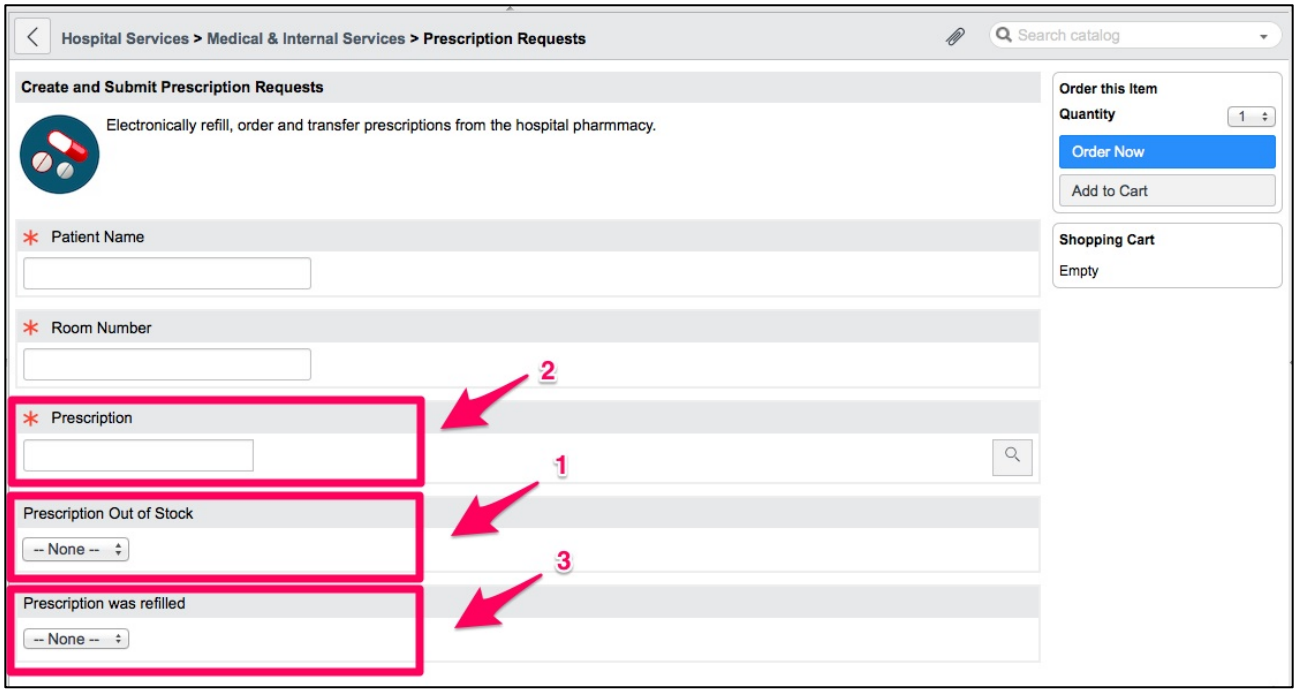
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4. Review the current state of the catalog item **Prescription Requests:**

   Per requirement #1, **Prescription Out of Stock** should be removed from catalog item and only be present on tasks generated for the group **Prescription Procurement**. Sections below guide this process.

   Per requirement #2, the group associated to the prescription chosen must approve the medication. Each prescription has and associated approval group that can be updated without admin participation.

   Per requirement #2 **Prescription was refilled** should be removed from catalog item and only be present on tasks generated for the group **Prescription Restock**. Sections below guide this process.



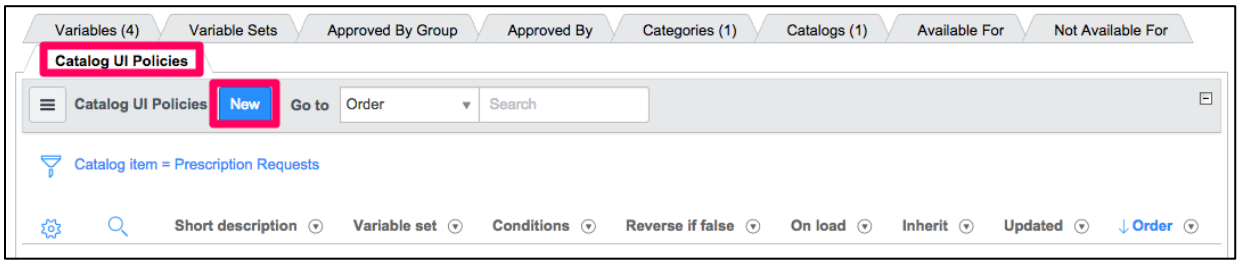
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Configuring UI Polices to Remove Variable and Make Mandatory

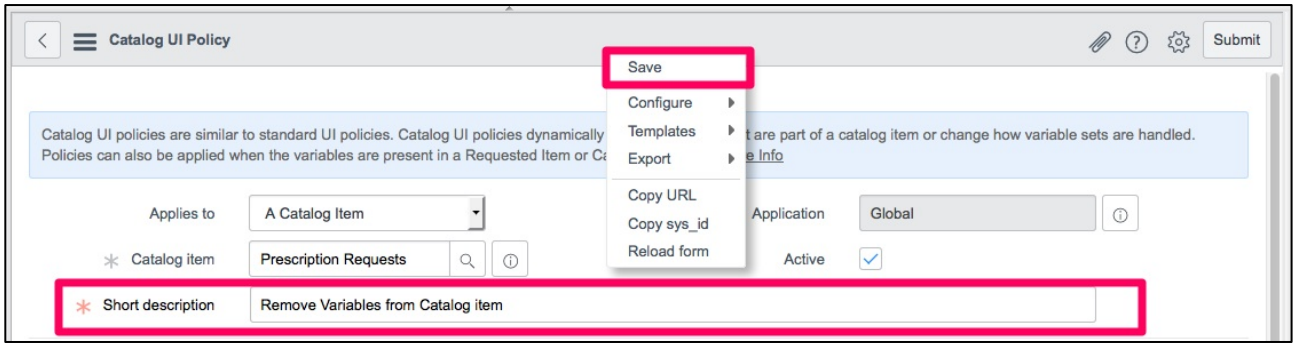
Land-Mark Caring requested that the variable **Prescription Out of Stock** not be present on the catalog item Prescription Requests. This variable should only be present on the first catalog task. In the section below you remove the variable Prescription Out of Stock from the catalog item form and present the variable on the first task and make it **Mandatory** via UI Policy.

1. Navigate to **Catalog Definitions > Maintain Items > Prescription Requests**.

2. Navigate to related list **Catalog UI Policies** and select **New**.



3. Catalog UI Policy form opens. Name the Catalog UI Policy **Remove Variables from Catalog item** right click the header and select **Save.**



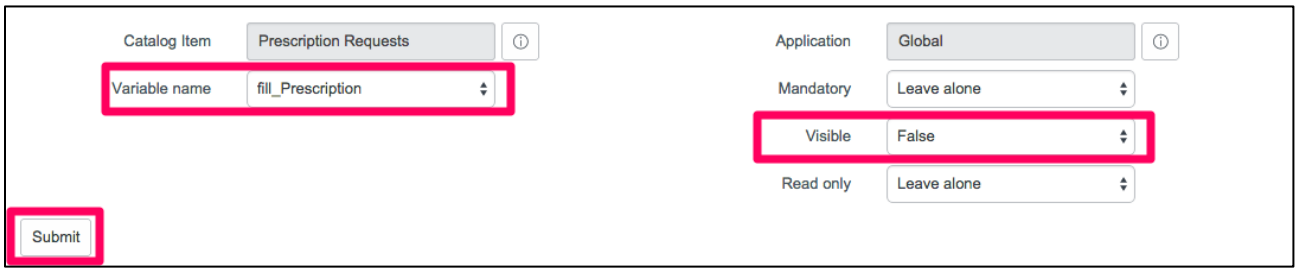
4. The form reloads with a related list. On the related list **Catalog UI Policy Actions,** select **New**.



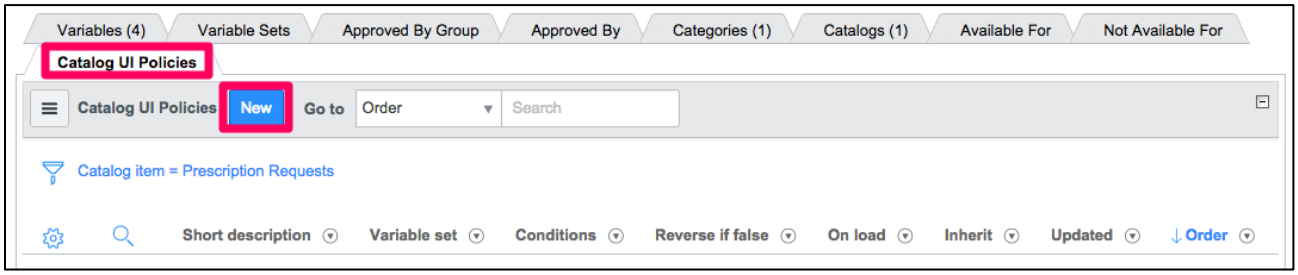
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5. A Catalog UI policy Action form opens. Select the **Variable** name **fill_Prescription** and set visible to **False**. Click **Submit**.

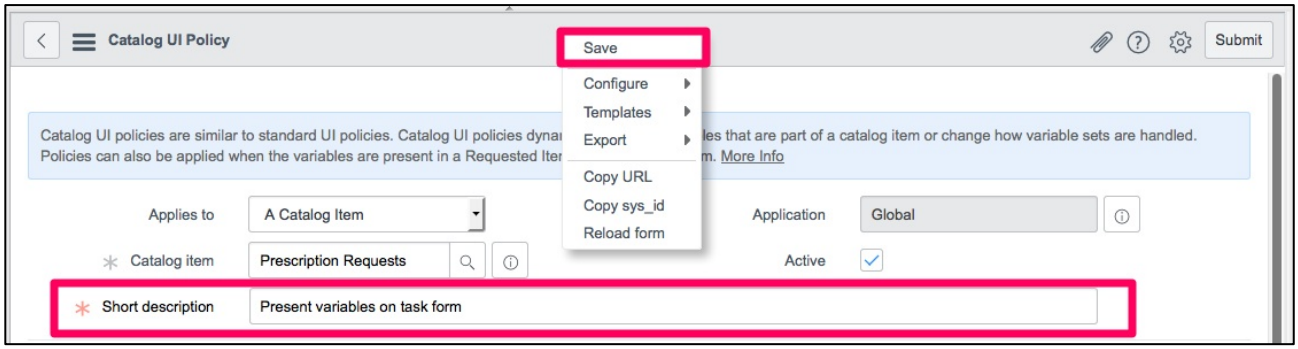
   Note: You just created a catalog UI policy that only applies on the catalog item view.



6. Navigate back to **Service Catalog** > **Maintain Items > Prescription Requests**. Navigate to related list **Catalog UI Policies.** Select **New**.



7. A Catalog UI Policies form opens. Enter the description for the Catalog UI Policy **Present variables on task form** right click the header and select **Save.**



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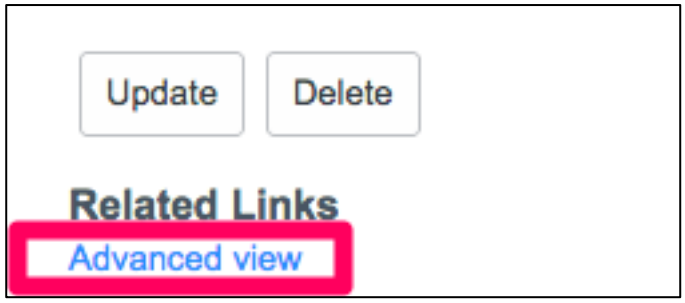
8. The form reloads with a related list. On the related list **Catalog UI Policy Actions,** select **New.**



9. Select the Variable name **fill_Prescription** and set Mandatory to **True**. Click **Submit**.

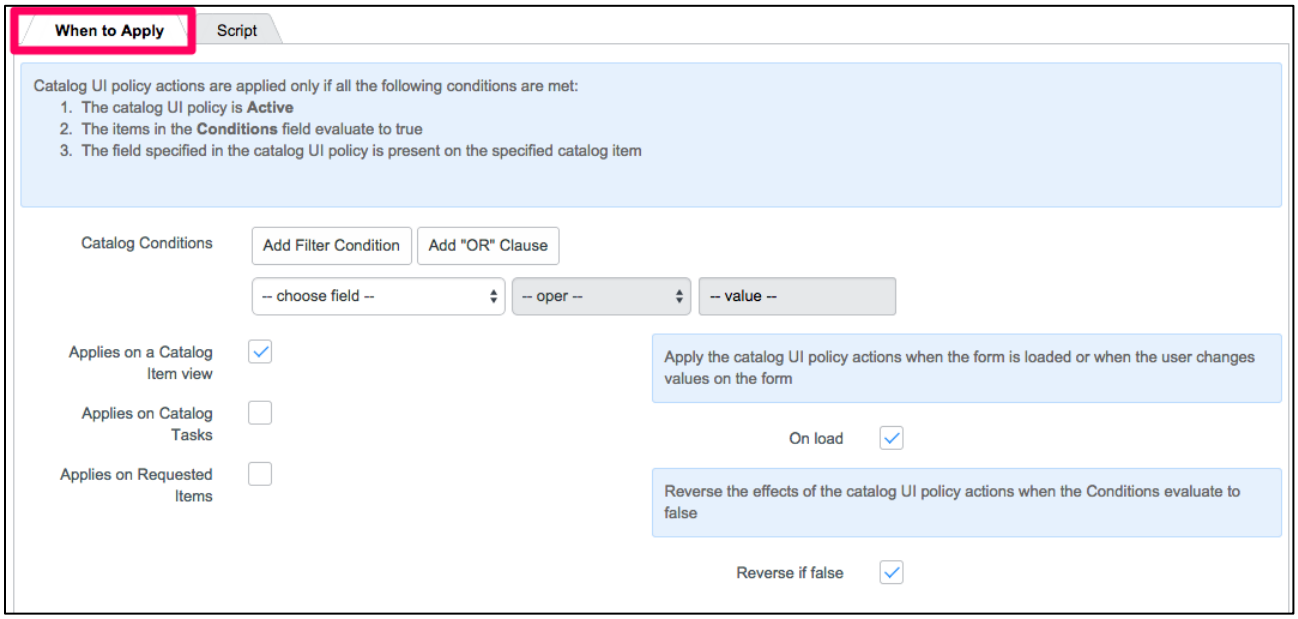


10. Navigate to the Catalog UI Policy **Present variables on task form**. In the Related Links section select **Advanced view**.



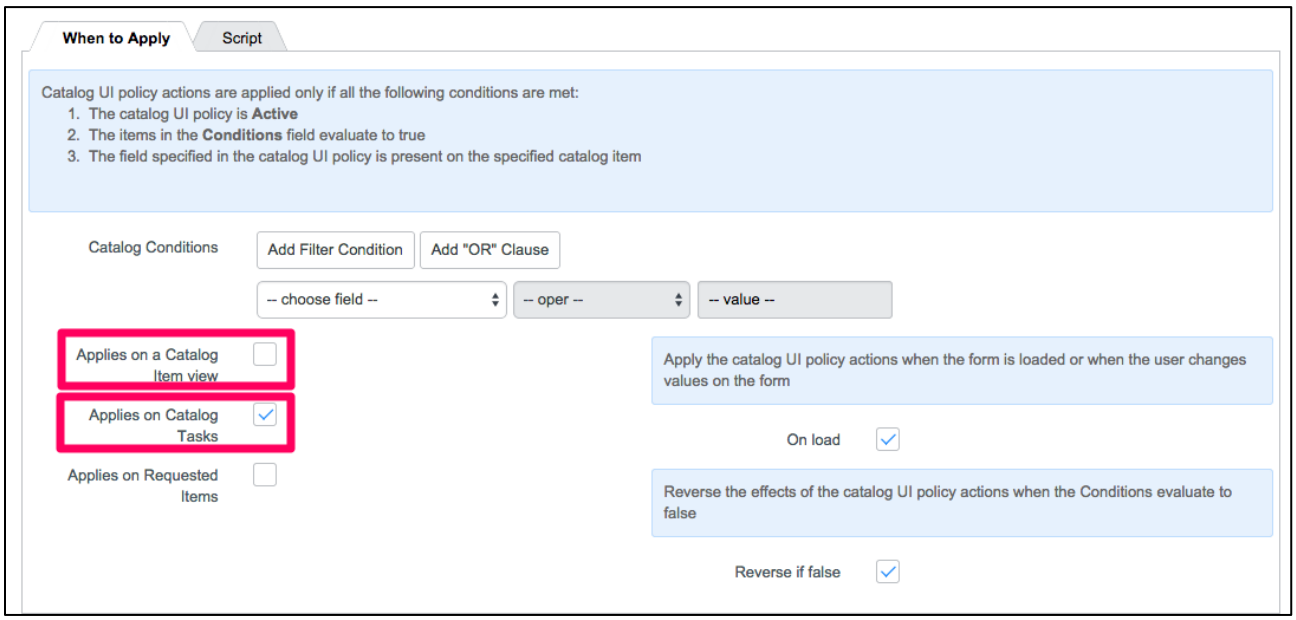
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11. Select the section **When to Apply.**



12. These check boxes represent when the Catalog UI policy runs. Set **Applies on Catalog Item view** to **False**. Set **Applies on Catalog tasks** to **True**. Click **Submit**.

    Note: You just configured a UI policy to run only on the task form. This UI policy is now configured to make a variable mandatory on the task form.



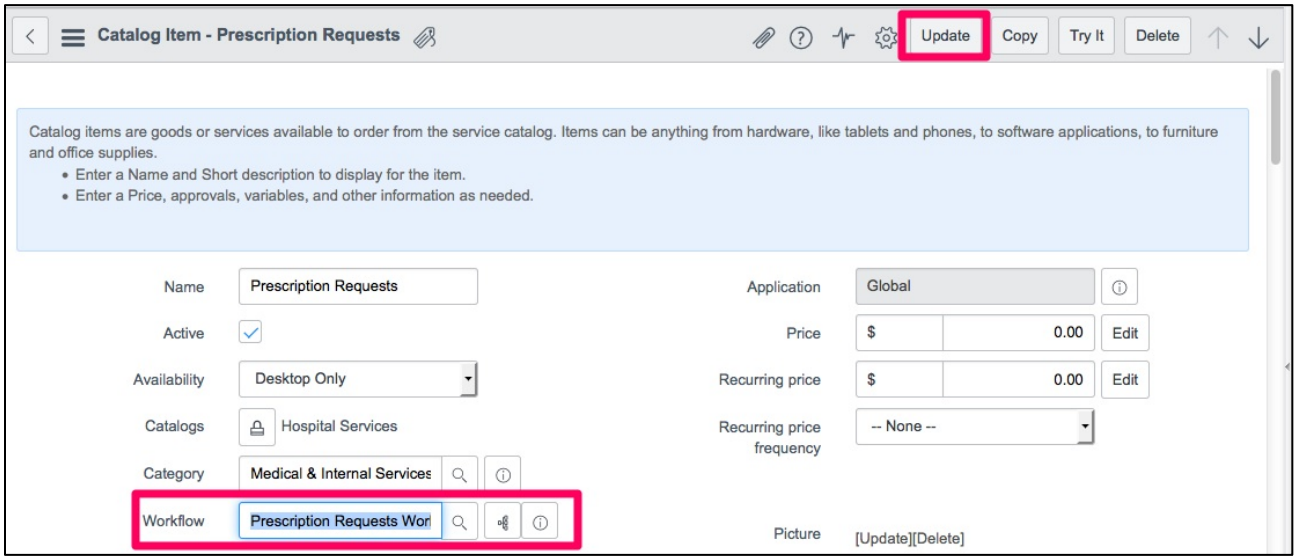
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Configure Workflow to Present Variables on Task

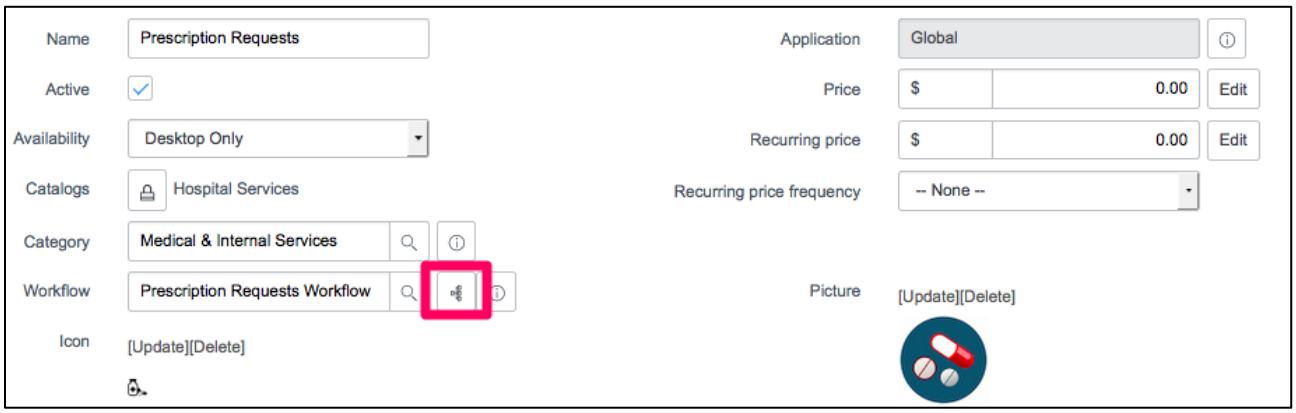
The UI Polices configured above remove a variable from a catalog form and present it on a task form. Now configure the variable to show on a certain task. Below you configure a catalog task activity that shows the variable **Prescription Out of Stock**.

1. Navigate to **Service Catalog > Maintain Items > Prescription Requests**.

2. Populate the workflow field with **Prescription Requests Workflow** and **Update** the record.

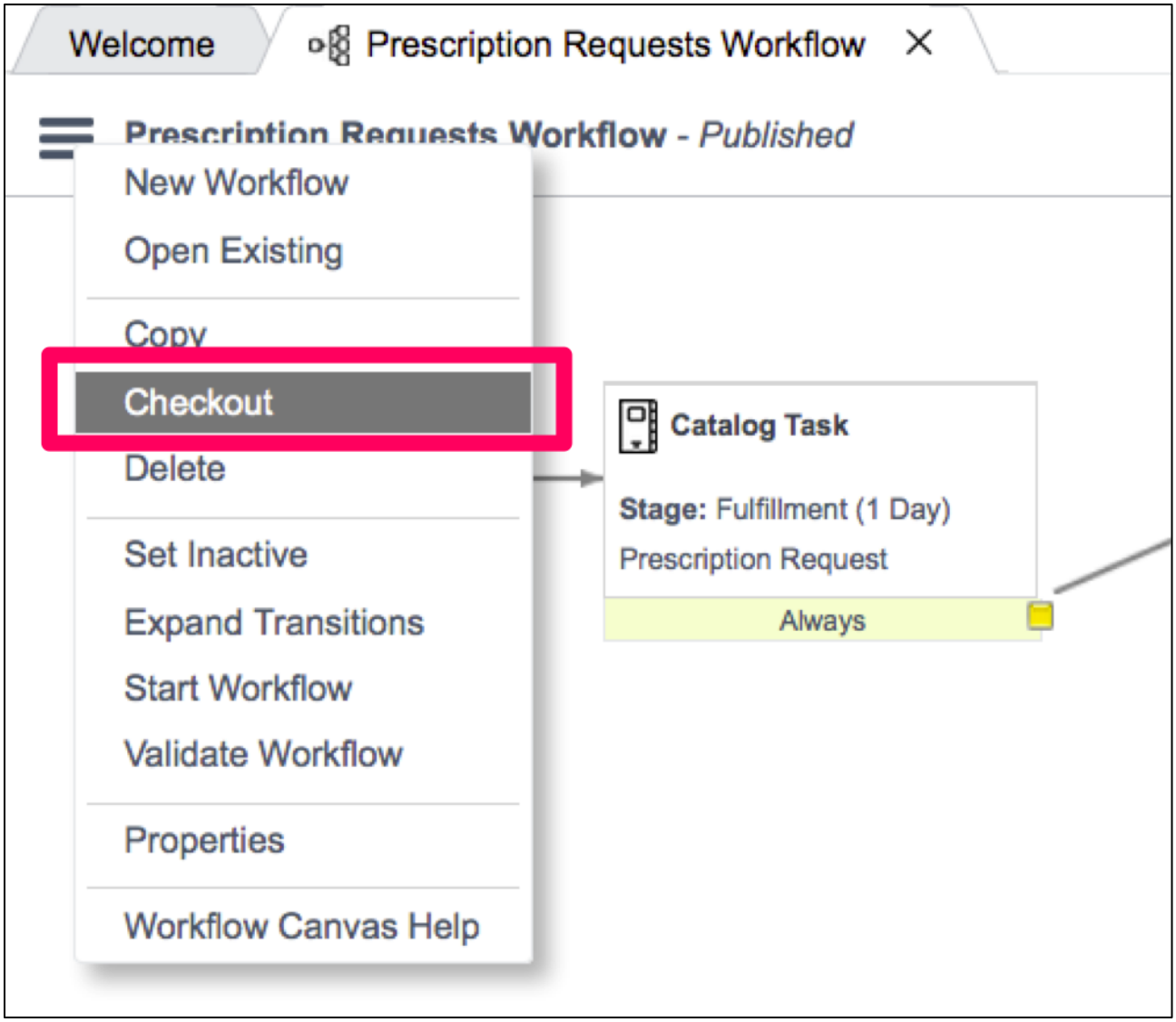


3. Navigate back to the catalog item. **Service Catalog** > **Maintain Items > Prescription Requests.** In the workflow field, click the **Show Workflow** icon.



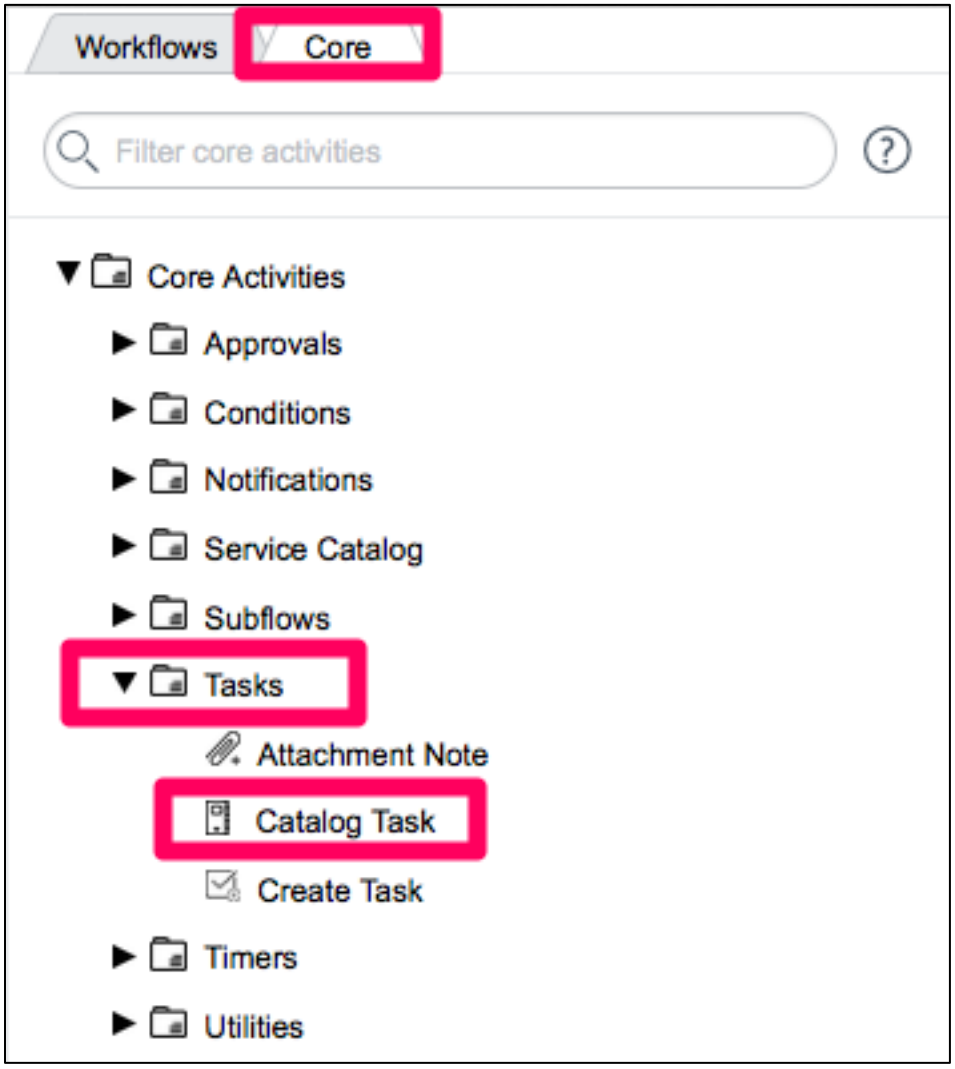
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4. The workflow appears in a new tab. Navigate to the new tab. Check the workflow out, by selecting the **Workflow Actions** button and **Checkout**.



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5. After checking out the workflow, select **Core >Core Activities > Tasks > Catalog Task** drag the activity to the middle of the screen**.**



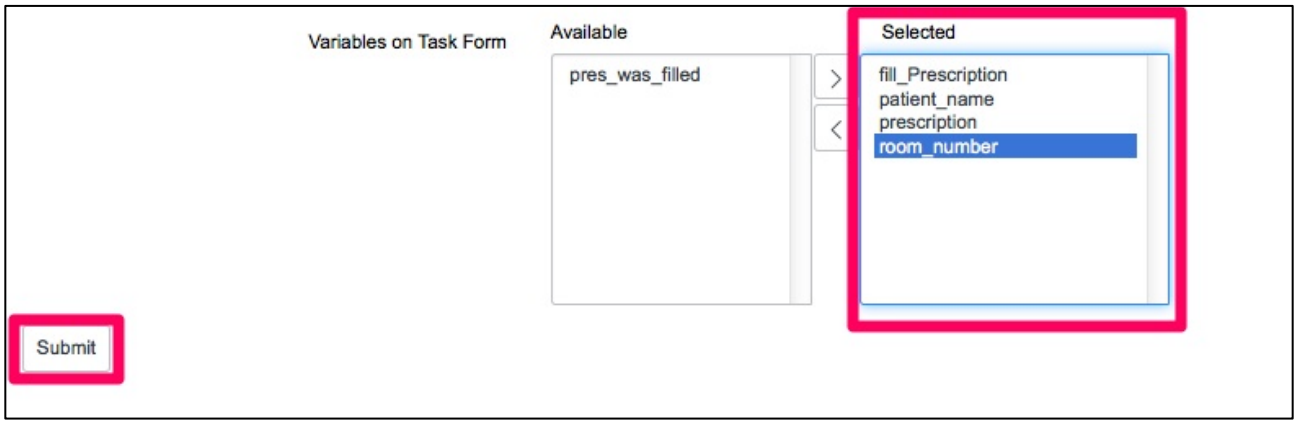
6. Enter the information below into the Catalog task workflow activity.

   Name: **Prescription Request**
   Fulfillment Group: **Prescription Procurement**
   Short description: **Prescription Request**
   Priority: **2 - High**
   Instructions: **If prescription refill is needed please action the variable Prescription Out of Stock accordingly.**

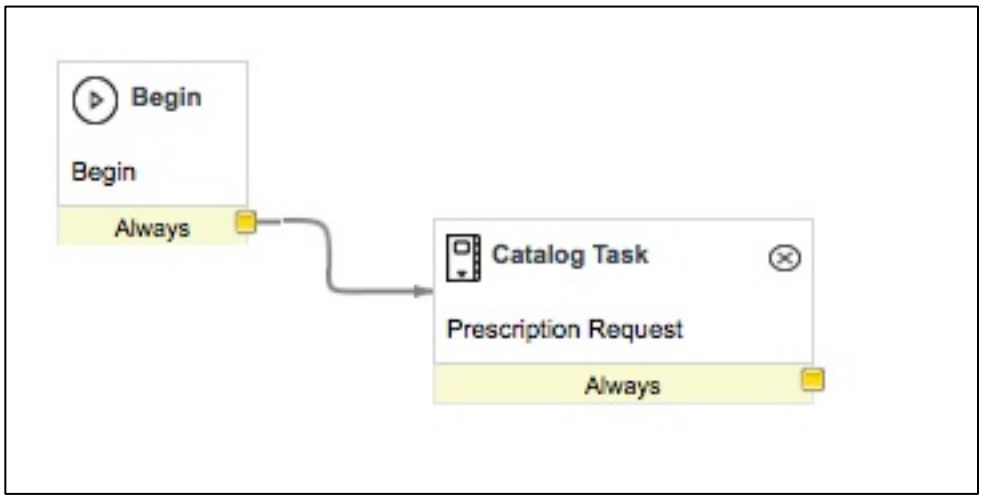
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7. After filling in the above information, navigate to the bottom of the catalog task workflow activity. All fields presented in **Variables on Task Form** should be moved from Available to Selected. When complete save the activity by pressing **Submit**.

   Note: All variables moved to the selected side of the **variables on task form** are present on this task.



8. You are redirected to the workflow. Connect the **Catalog Task** workflow activity to the **Begin** activity.



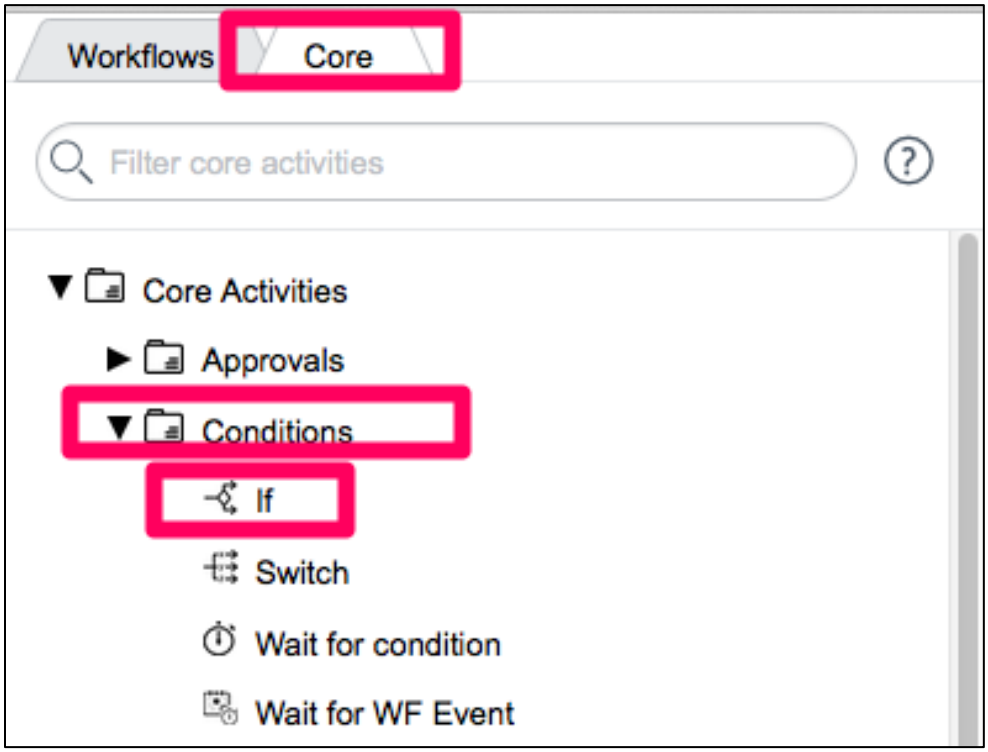
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Configure Conditional If Statement

A conditional if statement will be configured below to recognize the action of the fulfiller.

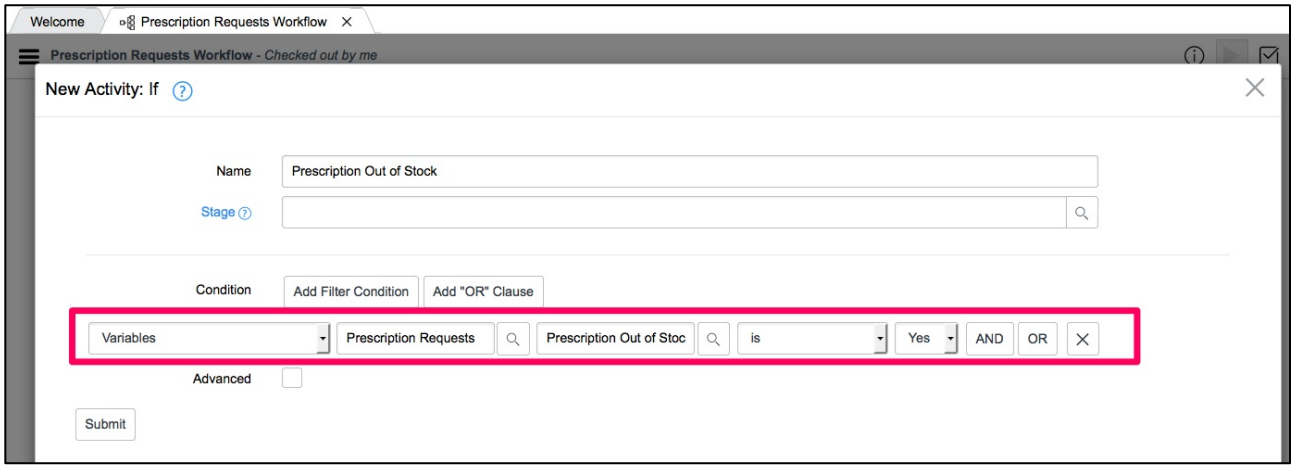
1. In the section below use an **If** activity to check to see what was returned from the variable **Prescription Out of Stock**. If **Yes** is returned, create another task and assign it to **Prescription Restock**.

2. Select **Core > Core Activities > Conditions > If** drag the activity to the middle of the screen**.**



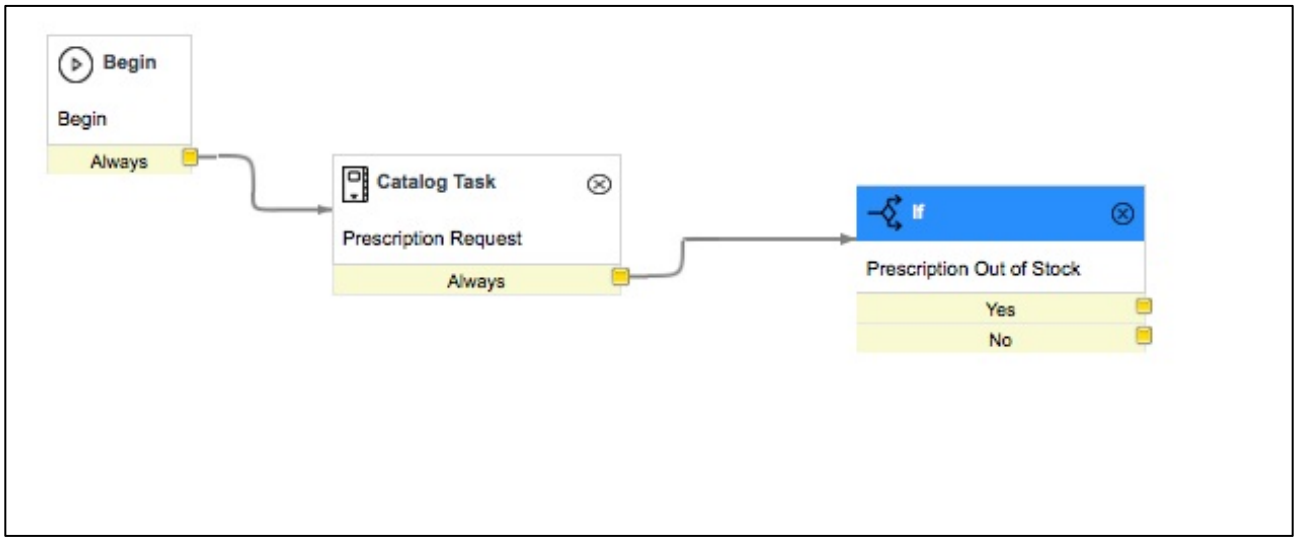
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3. Enter the below information into the **If** activity.
   Name: **Prescription Out of Stock**
   Condition: (to see the variable field in the conditional field selector select **Show Related Fields**)



4. **Submit** the activity.

5. Connect the **Catalog Task** workflow activity to the **If** workflow activity.

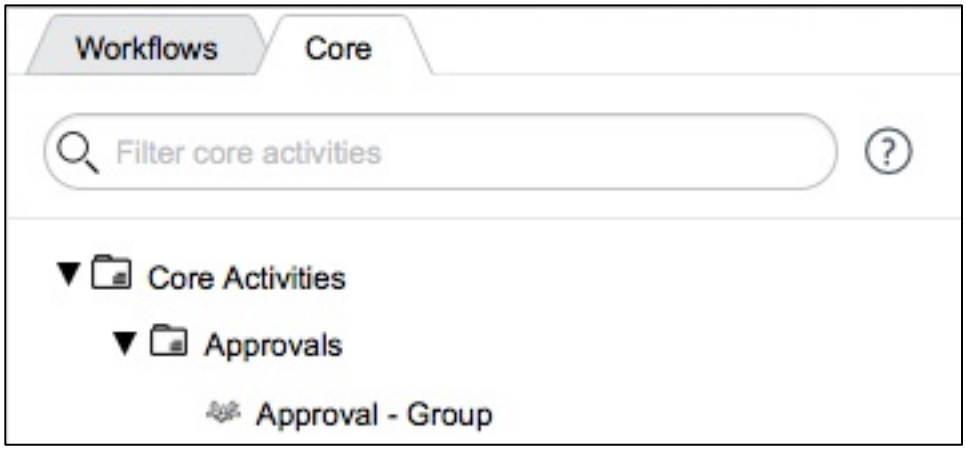


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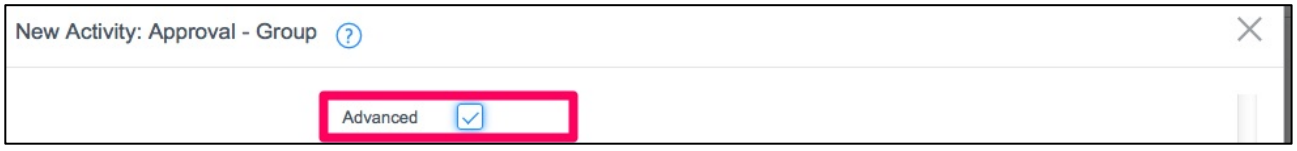
Configure Prescription Approval

If the prescription is Out of Stock the group associated to the prescription must approve the medication. In the section below you will configure this approval.

1. Select **Core >Core Activities > Approval > Approval – Group** drag the activity to the middle of the screen**.**



2. On the Approval – Group Activity set **Advance** to true.



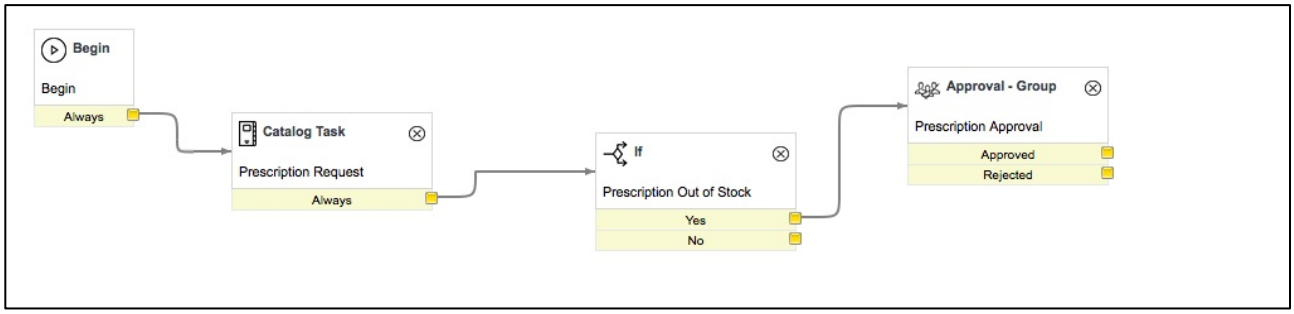
3. Enter the below information into the approval activity.
   Name: **Prescription Approval**
   Script:

```
var answer = [];
answer.push(current.variables.prescription.u_owner_group);
```

4. **Submit** the Approval task

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5. Connect the **Yes** If activity to the **Approval – Group** activity.



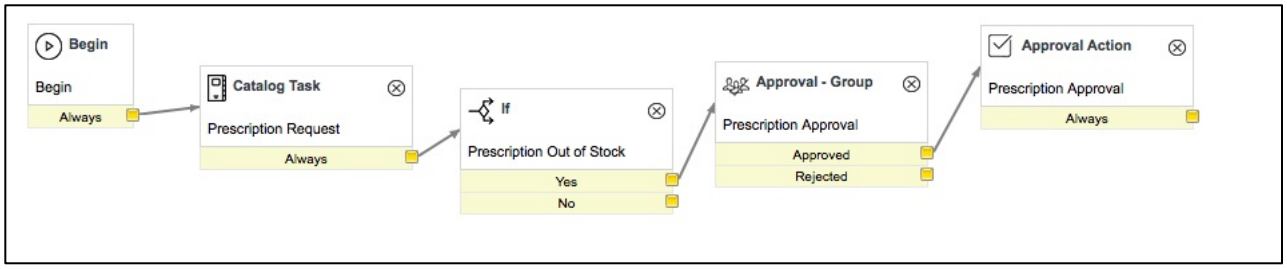
6. Navigate to **Core >Core Activities > Approval > Approval Action** drag the activity to the middle of the screen**.**



7. Enter the below information into the Approval Action.
   Name: **Prescription Approval**
   Action: **Mark task approved**

8. **Submit** the record.

9. Connect the **Approval – Group** activity to the **Approval Action**.

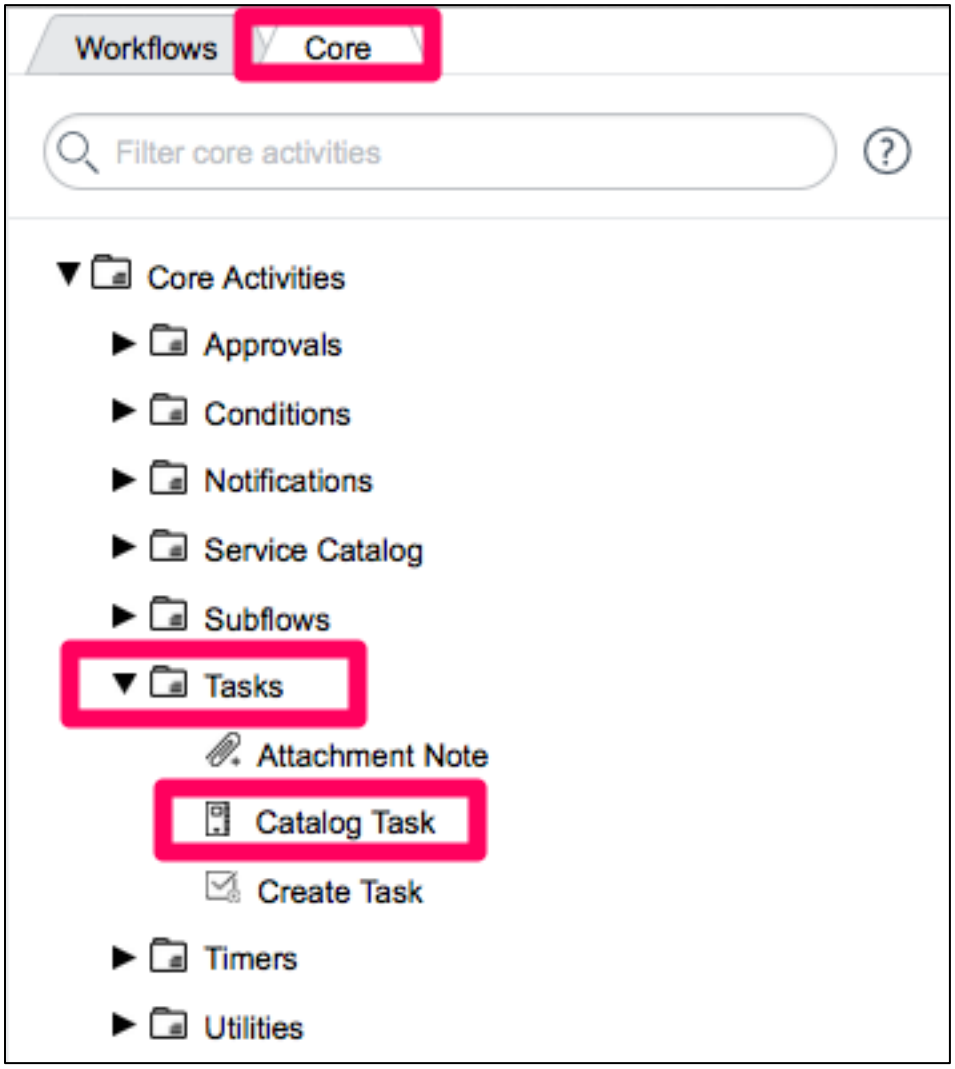


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Configure Catalog Task

If the prescription is out of stock: A task should be generated for the group Prescription Restock. In the section below you will configure this task.

1. Configure another task. Select **Core > Core Activities > Tasks > Catalog Task** drag the activity to the middle of the screen.



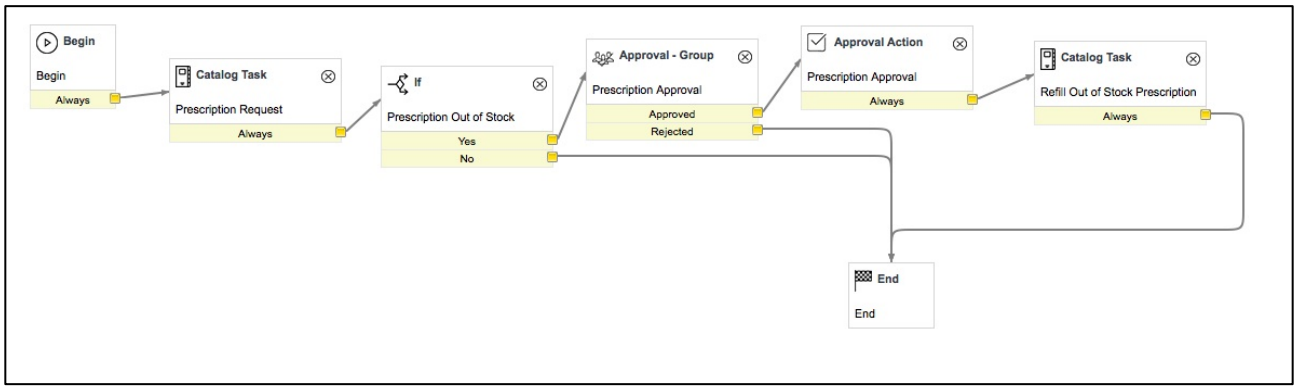
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2. Enter the information below into the **Catalog Task** workflow activity.

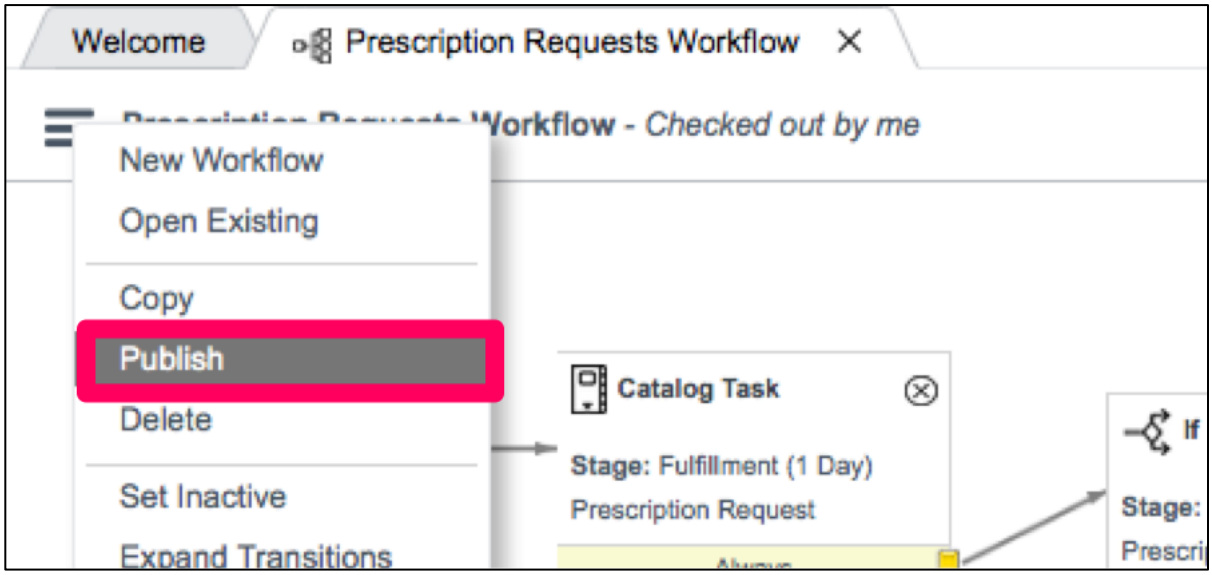
   Name: **Refill Out of Stock Prescription**
   Fulfillment Group: **Prescription Restock**
   Short description: **Refill Out of Stock Prescription**
   Priority: **2 - High**
   Instructions: **To confirm you have refilled out of stock prescription close Task and Action variable.**

3. **Submit** the activity.

4. Connect the workflow as shown in the example.



5. Select **Workflow Actions** > **Publish**.

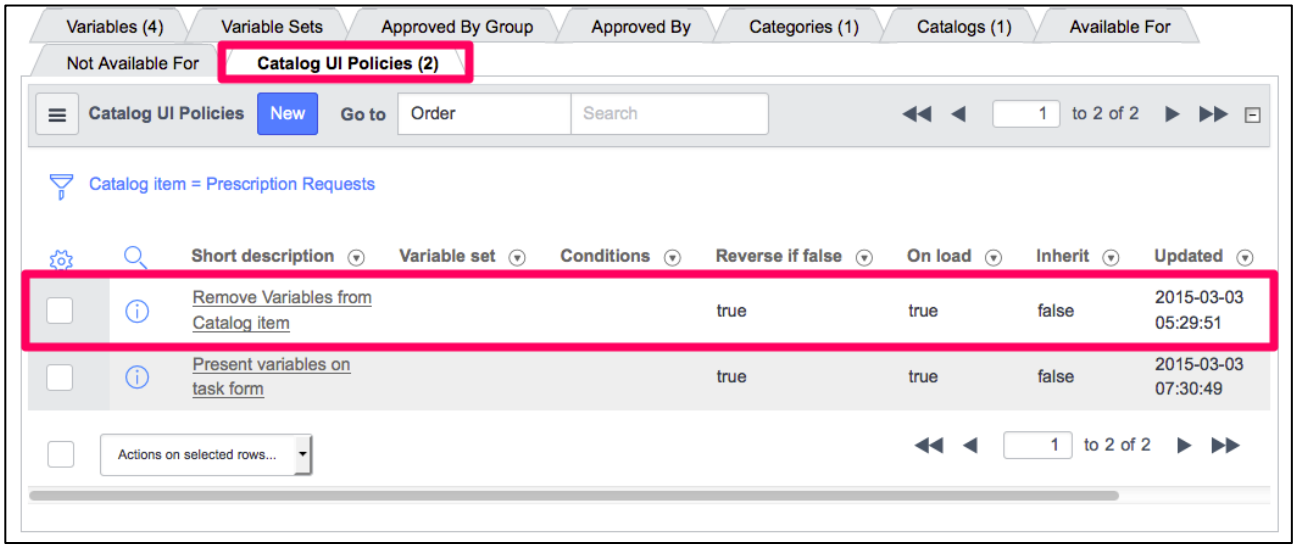


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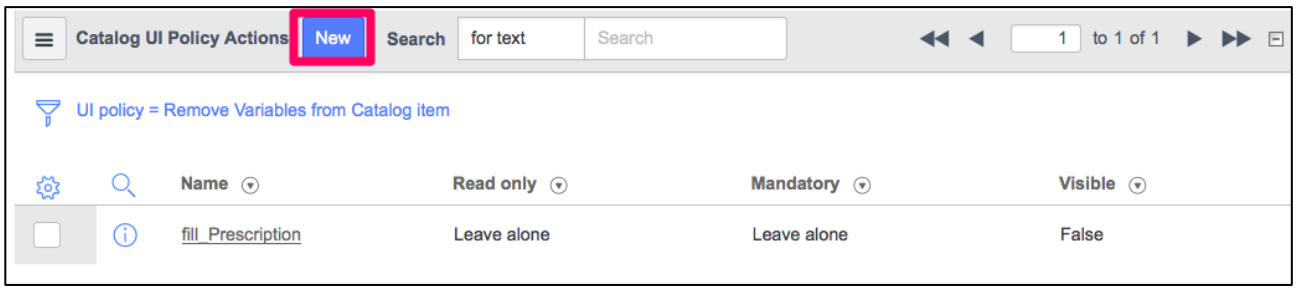
Remove Variable from Catalog Item Form Using a UI Policy

Land-Mark Caring has requested that the variable Prescription was refilled should only be present on the second task. The variable Prescription was refilled will be removed from that catalog item form via a previously configured UI Policy

1. Navigate to **Catalog Definitions > Maintain Items > Prescription Requests**.
2. Navigate to the related list **Catalog UI Policies** and select **Remove Variables from Catalog item.**

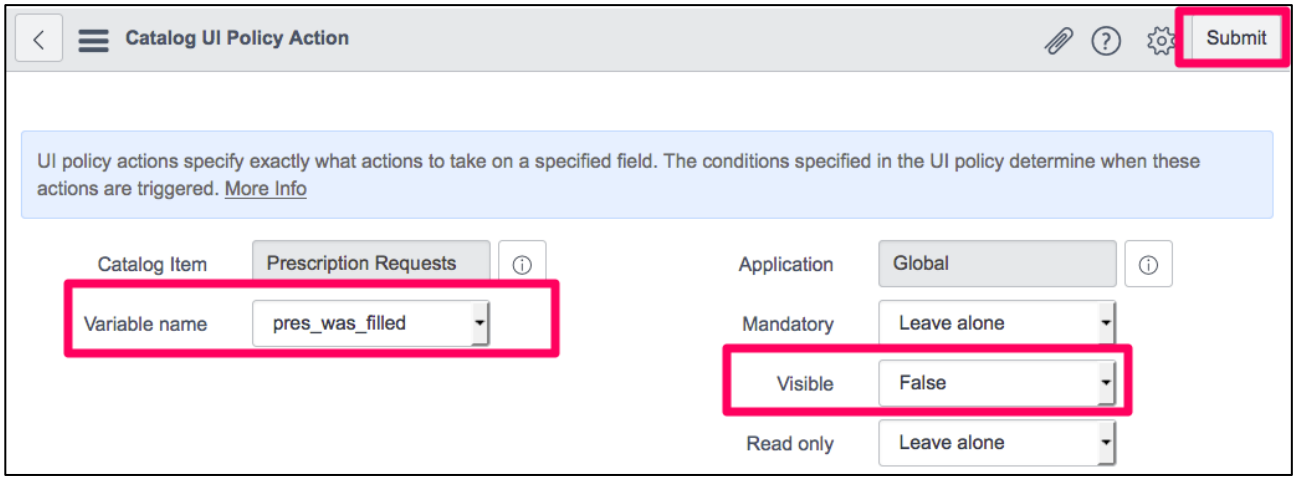


3. Navigate to the related list **Catalog UI Policy Actions** and select **New.**



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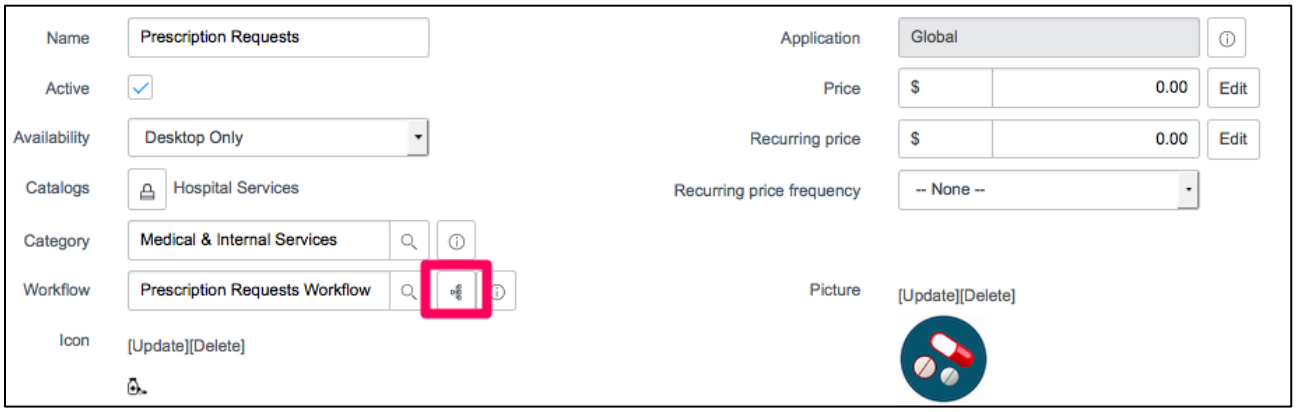
4. Select the Variable name **pres_was_filled** and set Visible to **False. Submit** the record.



Configure Second Workflow Task to Present Variable

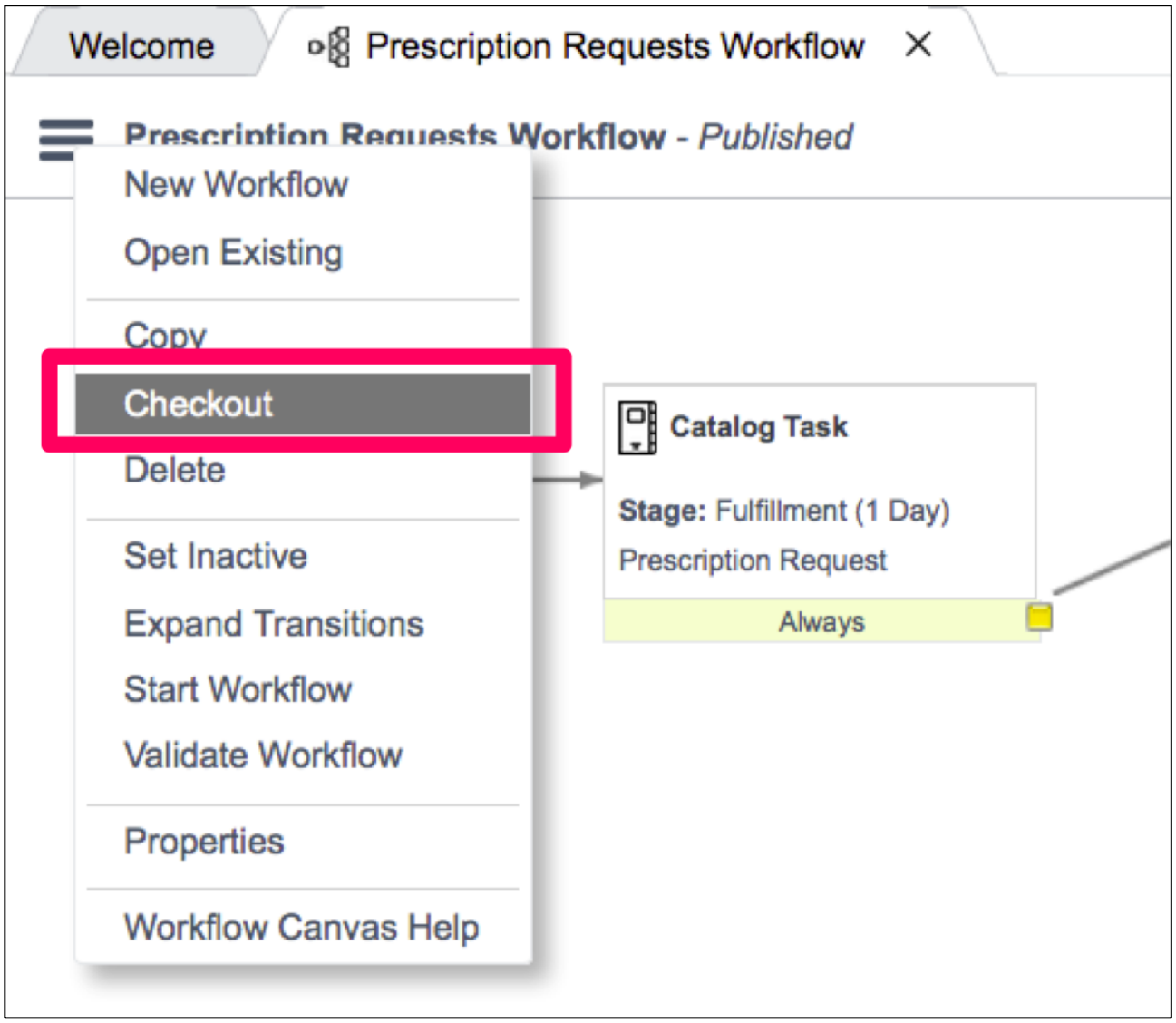
Land-Mark Caring requested that variable **Prescription was refilled** is only present on the second task. In the section below, task two is manipulated so the variable **Prescription was refilled** is present.

1. Navigate to **Service Catalog** > **Maintain Items > Prescription Requests.** In the workflow field, click the **Show Workflow** icon.



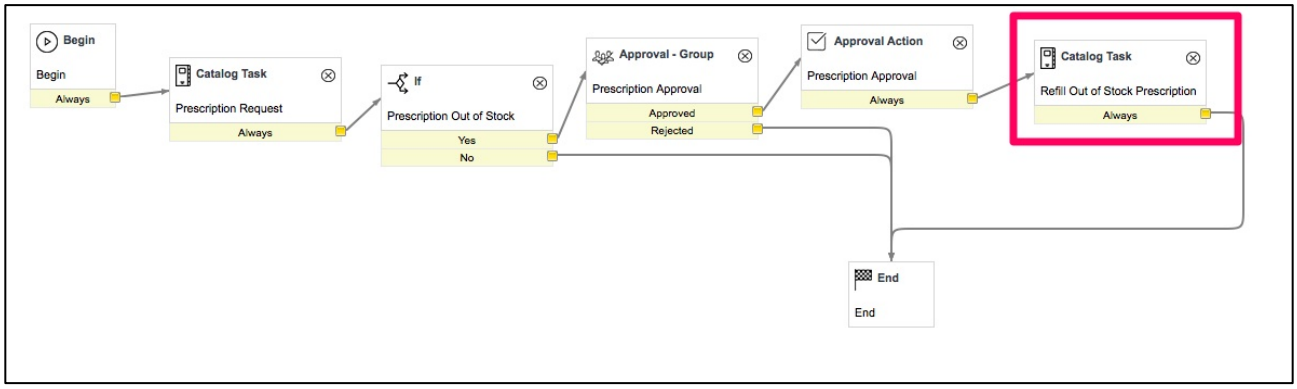
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2. The workflow appears in a new tab. Navigate to the new tab. Check the workflow out, by selecting the **Workflow Actions** button and **Checkout**.

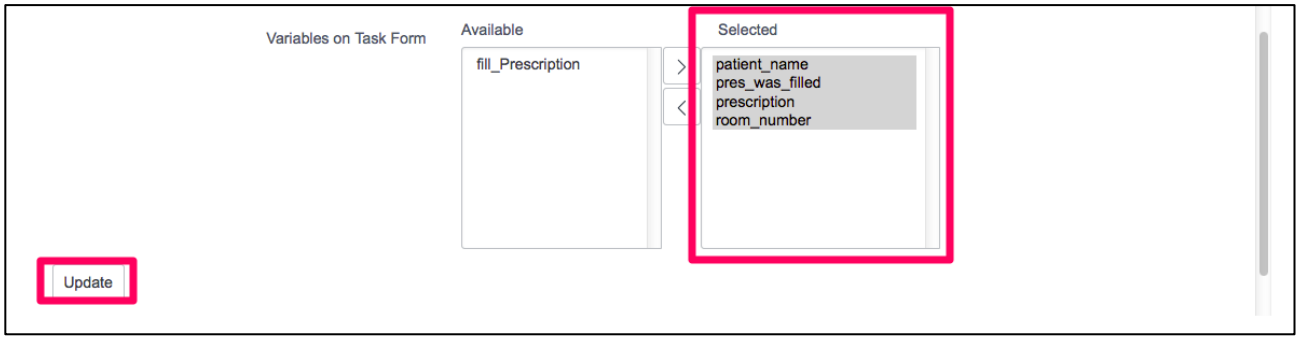


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3. Navigate to catalog task **Refill Out of Stock Prescription**.

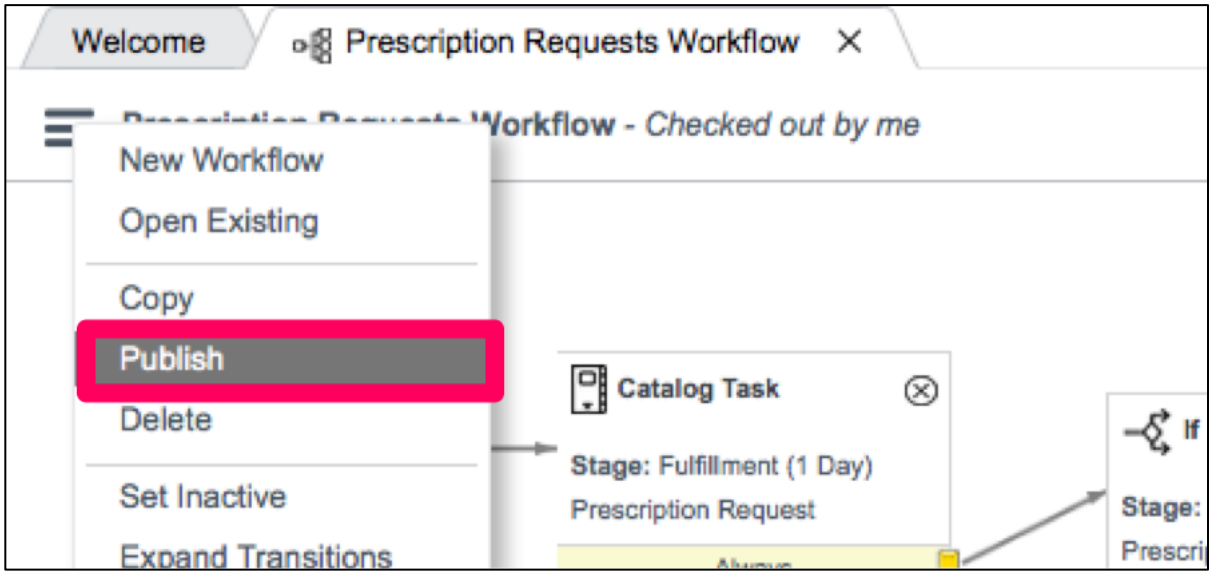


4. Navigate to field **Variables on Task Form.** Move the fields in the example from **Available** to **Selected**. **Update** the record.



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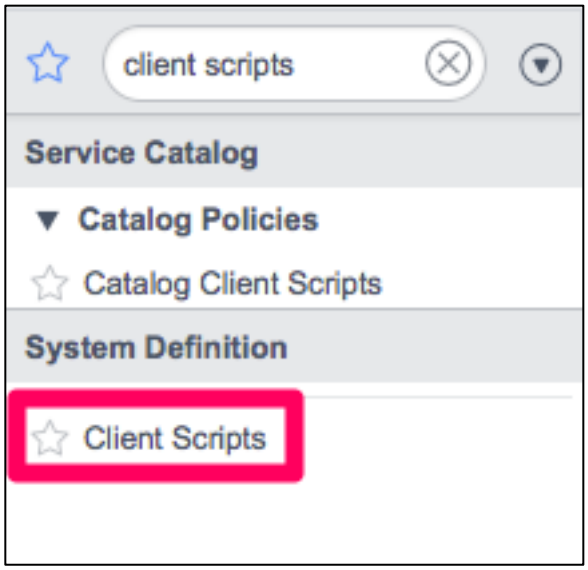
5. Navigate to **Workflow Actions** and select **Publish**.



Configure Custom Client Script to Confirm Action on Variable

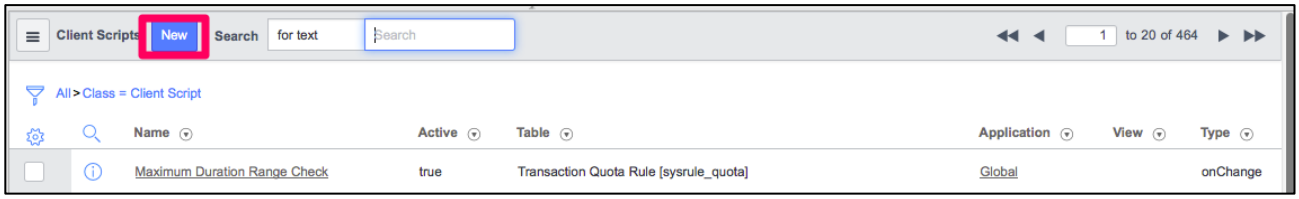
The requirements for Land-Mark Caring request that the variable **Prescription was refilled** become mandatory when the state becomes Closed Complete. In the section below you accomplish this requirement by implementing a client script on the catalog task table.

1. Create catalog client script: Navigate to **Client Scripts**.



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2. Click **New** to create Client Script



3. Create Client script with below information:

Name: **Prescription Requests confirm**
Table: **Catalog Task [sc_task]**
UI Type: **Desktop**
Type: **onChange**
Field name: **State**
Script:

```
function onChange(control, oldValue, newValue, is Loading, isTemplate)
{
   if (isLoading || newValue == '') {
      return;
   }

var group = g_form.getReference('assignment_group');

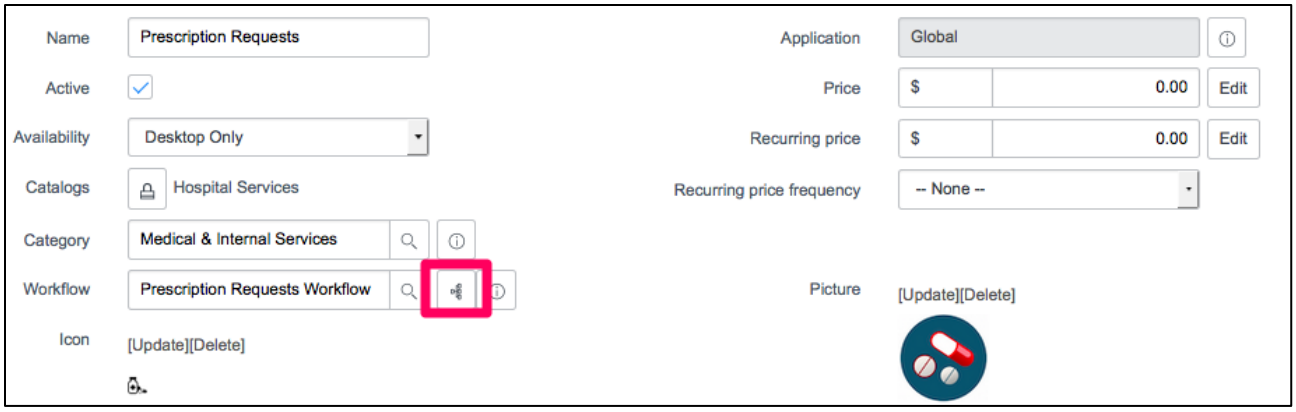
if (group.name == 'Prescription Restock' && newValue == '3'){
 g_form.setMandatory('pres_was_filled',true);
   }
}
```

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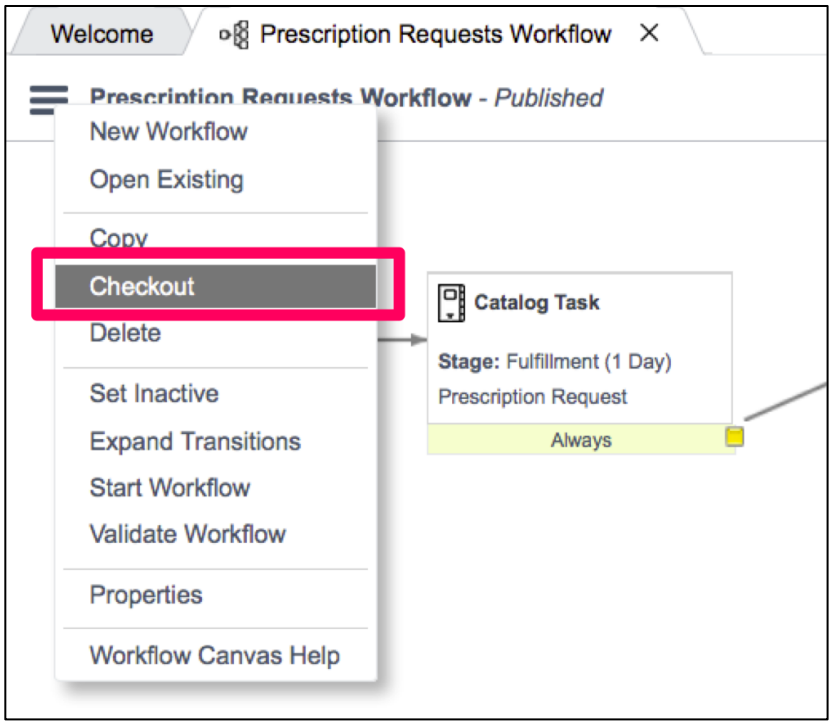
Creating Custom Stages

In the section below you will create custom stages.

1. Navigate to **Service Catalog > Maintain Items > Prescription Requests**. In the workflow field, click the **Show Workflow** icon.

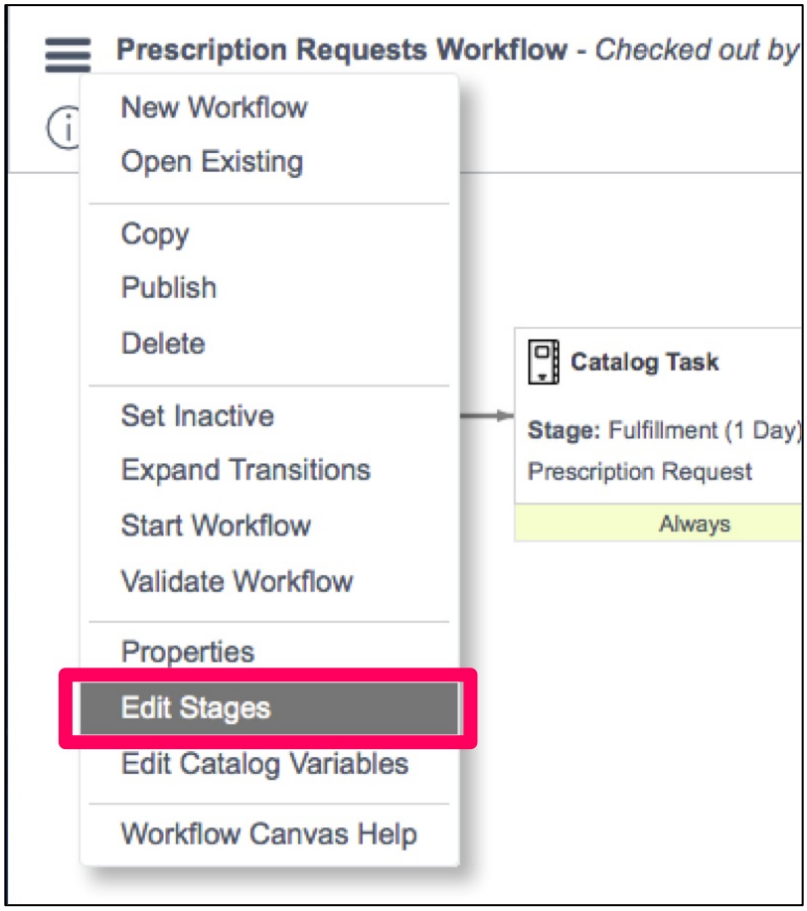


2. The workflow appears in a new tab. Navigate to the new tab. Check the workflow out, by selecting the **Workflow Actions** button and **Checkout**.

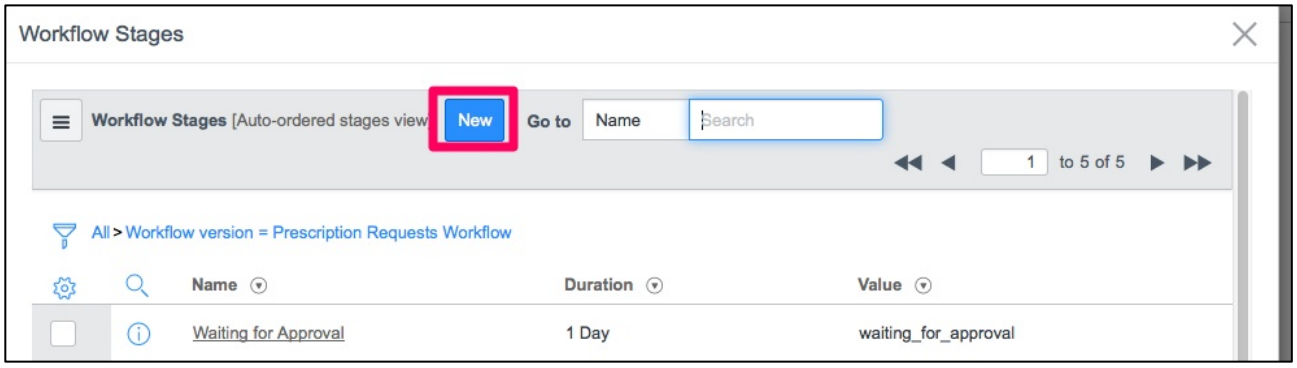


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3. Navigate back to the **Workflow Actions** button and select **Edit Stages**.



4. Create a new Stage by selecting **New**.

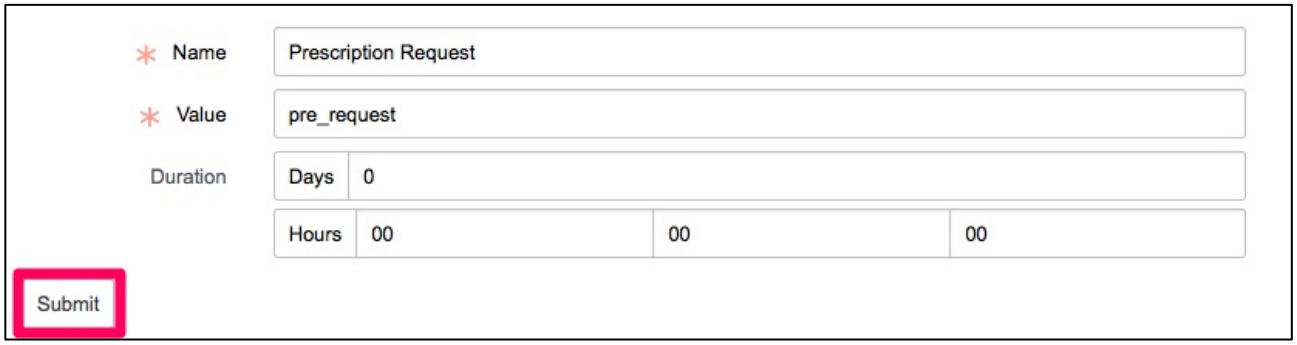


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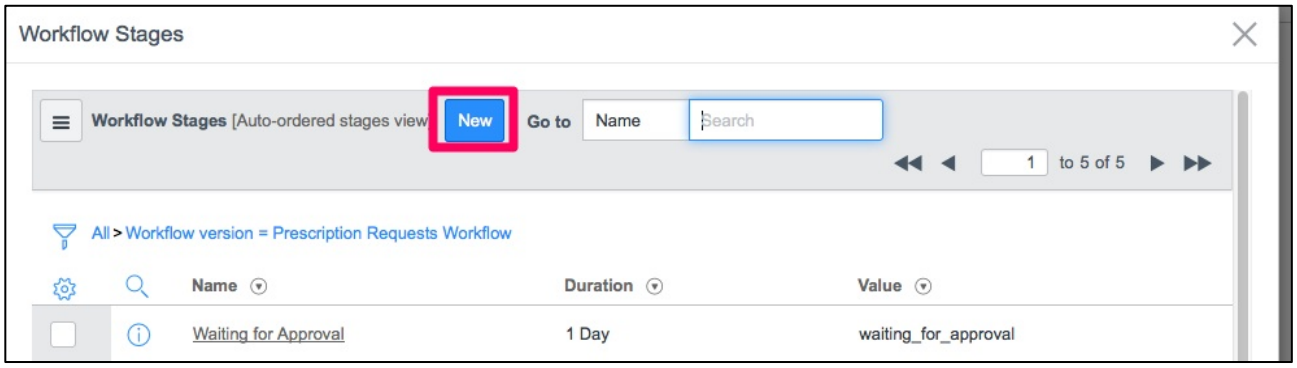
5. Fill in the following information

   Name: **Prescription Request**
   Value: **pre_request**

6. Create the stage by pressing **Submit**.



7. Create another stage by selecting **New.**



8. Fill in the following information
   Name: **Prescription Approval**
   Value: pres_appro

9. Create the stage by pressing **Submit.**

10. Create another Stage by selecting **New**.

11. Fill in the following information
    Name: **Prescription Refill**
    Value: **pre_refill**

12. Create the stage by pressing **Submit.**

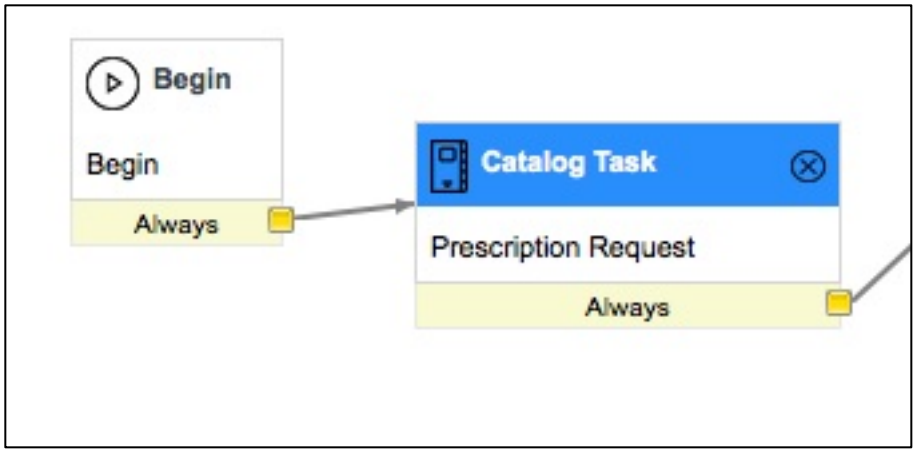
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13. Close the **Workflow Stage** menu.

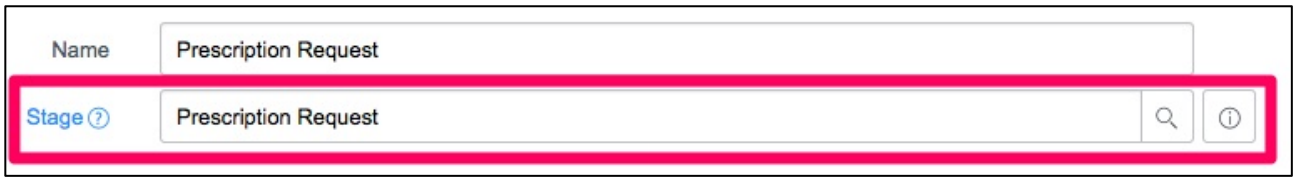
Add Custom Stages to Workflow Activities

In the section below add the custom stages to the workflow activities.

1. Select task **Prescription Request** Task.



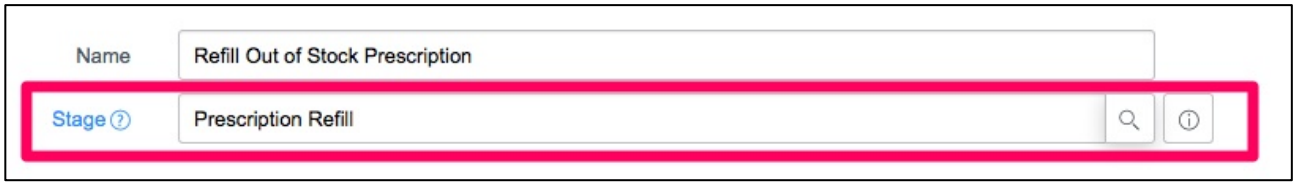
2. Add **Prescription Request** to the **Stage** Field.



3. Select **Update.**
4. Select the approval activity **Prescription Approval**.
5. Add Prescription Approval to **Stage** field.
6. Select **Update.**
7. Select task called **Refill Out of Stock Prescription**.

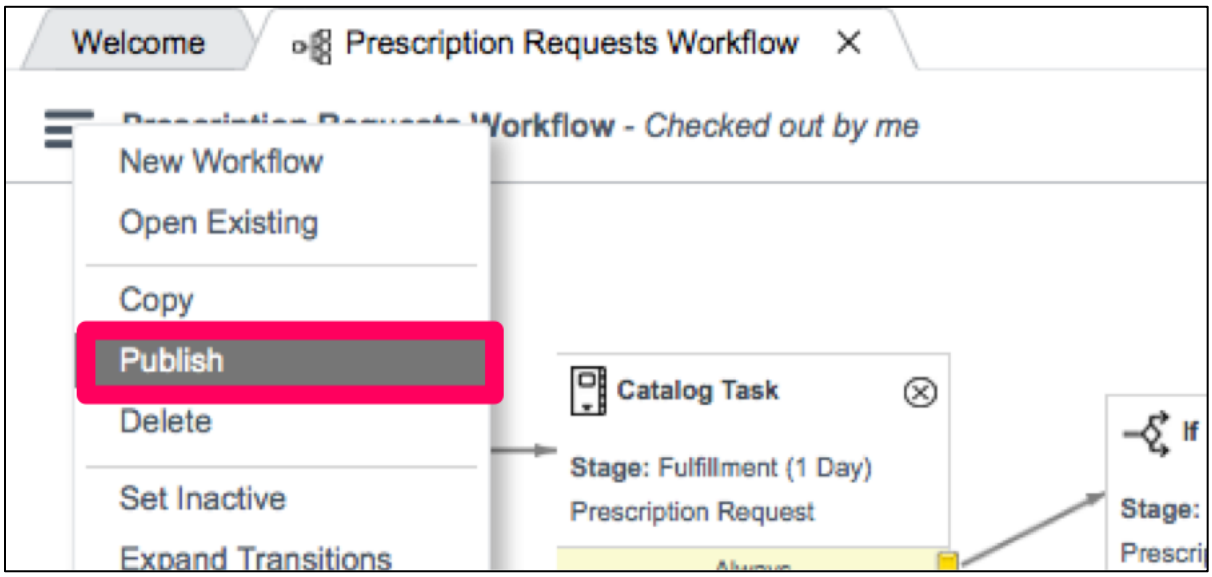
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8. Add Prescription Refill to **Stage** field.



9. Select **Update.**

10. Select **Workflow Actions** > **Publish**.

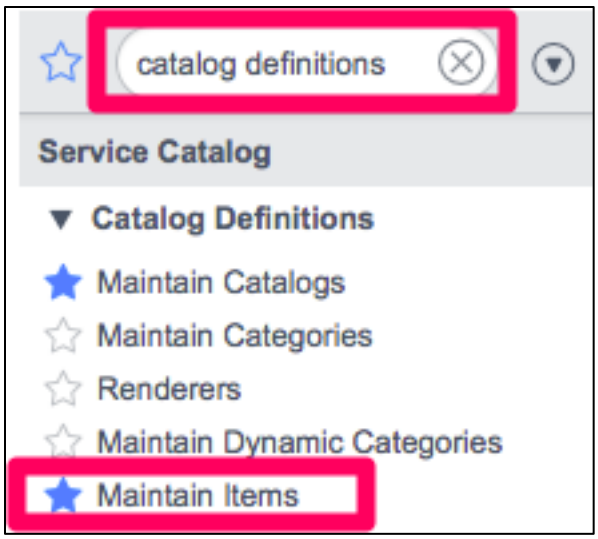


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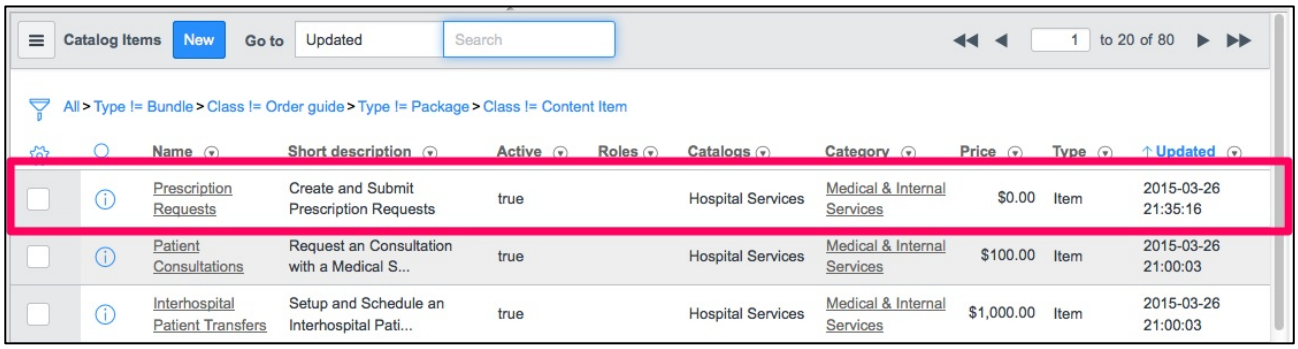
Catalog Item Prescription Requests

In the section below, catalog item **Prescription Requests** is ordered. While ordering this item, review all customizations applied.

1. Navigate to **Catalog Definitions > Maintain Items**.

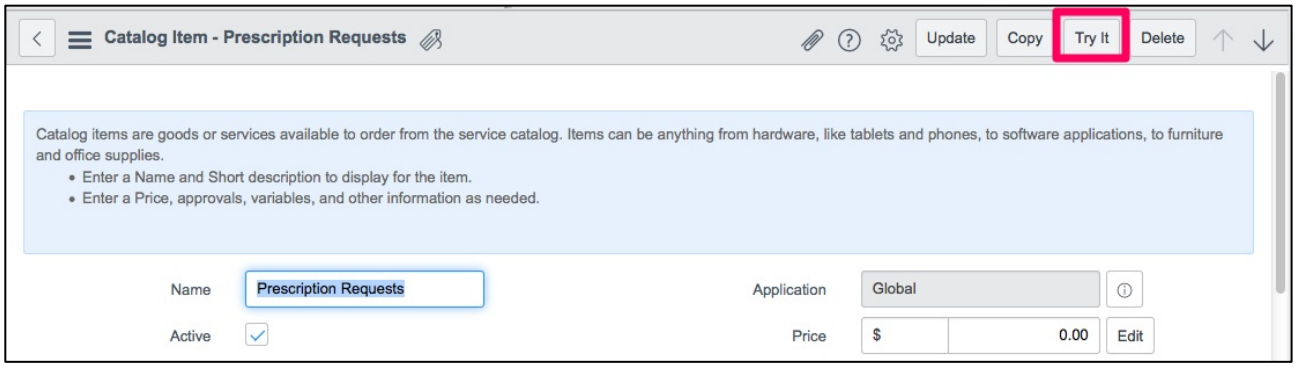


2. Select Catalog Item **Prescription Requests**.

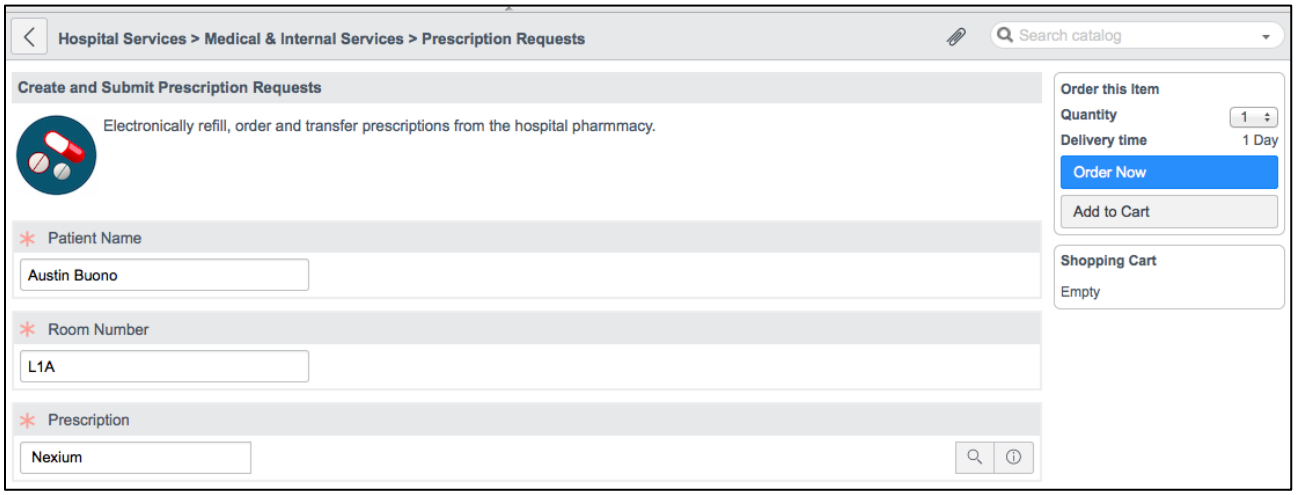


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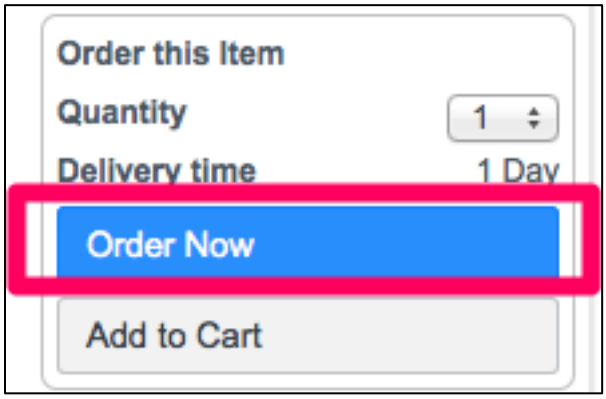
3. Select **Try It**.



4. The Item will appear.



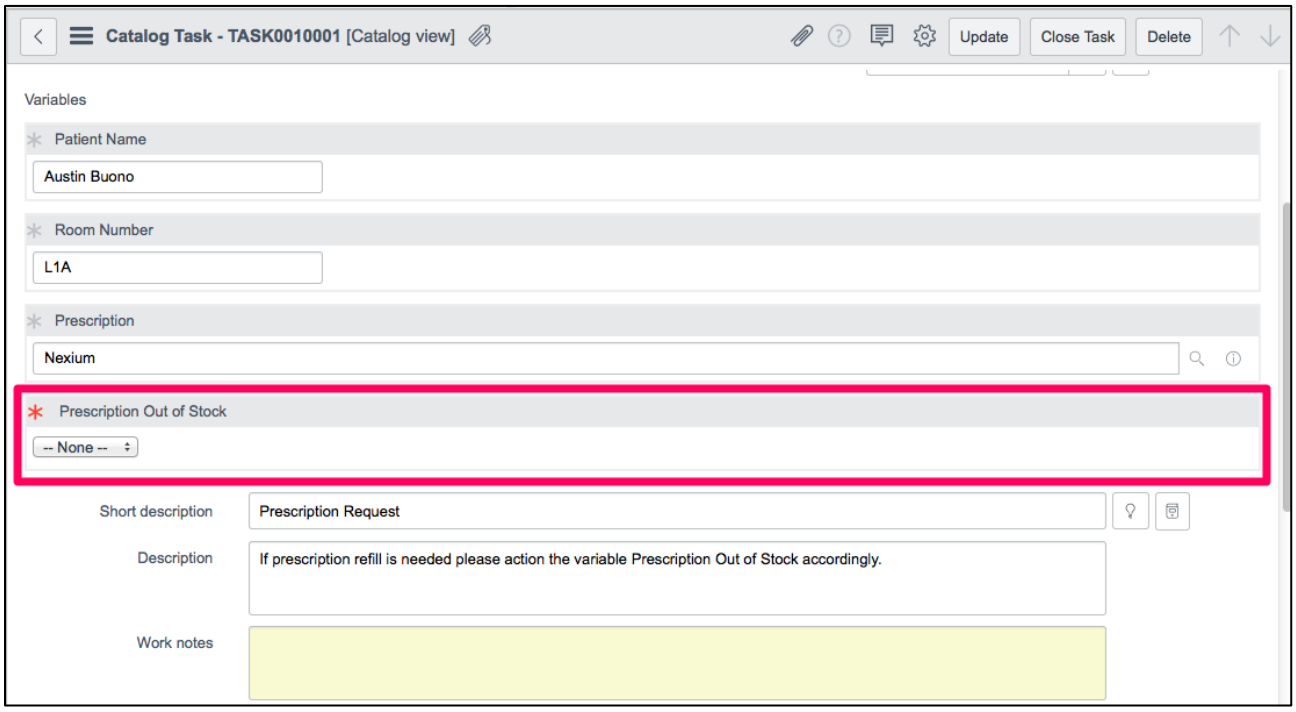
5. Submit the request by selecting **Order Now**.



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6. Review custom stages on the Order Status Screen.

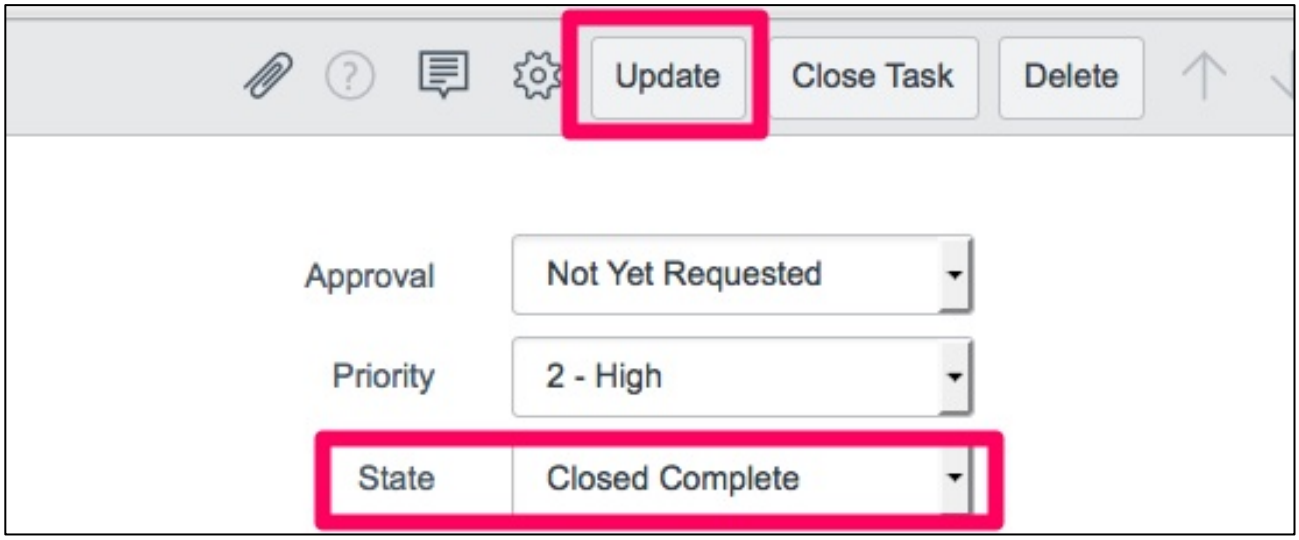
7. Navigate to the created **Requested item** and into the **Task** created. The variable **Prescription Out of Stock** is not present on the Task form and Mandatory.



8. Set the variable **Prescription Out of Stock** to **Yes**.

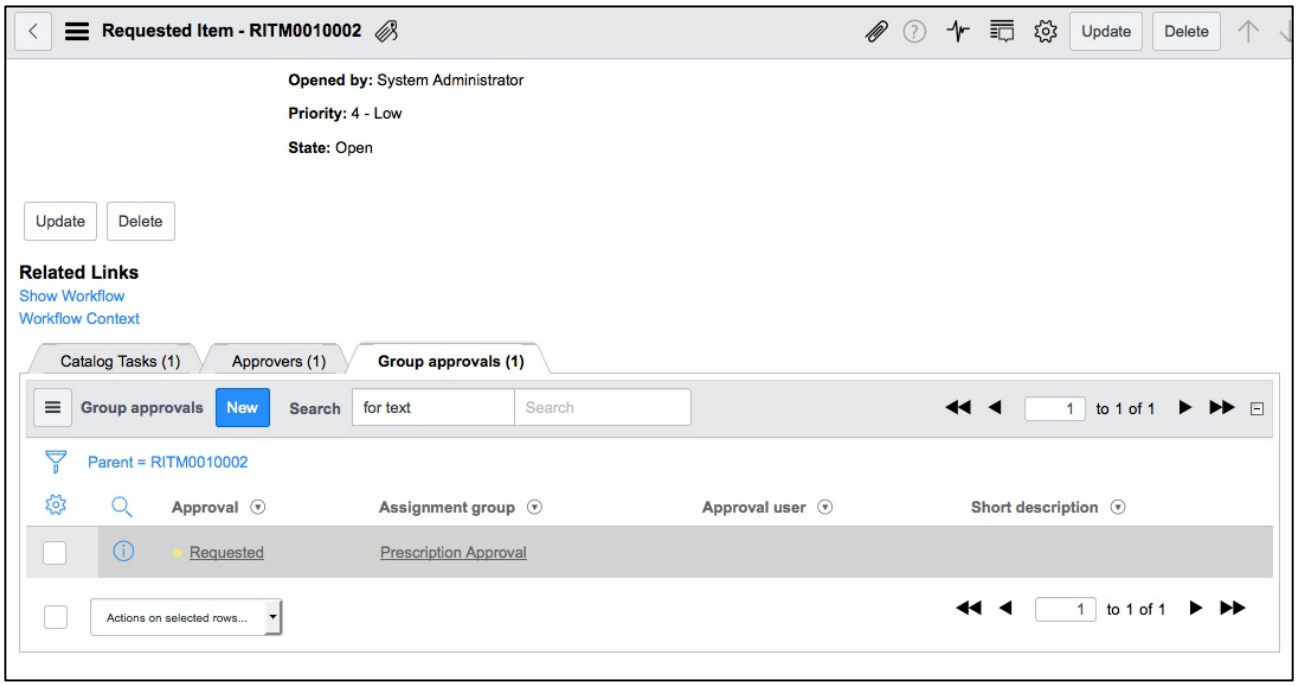
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9. Set **State** to **Closed Complete** and **Update** the record.



10. This should have created an approval task.

11. Navigate to the approval task by returning to the **Request item.**

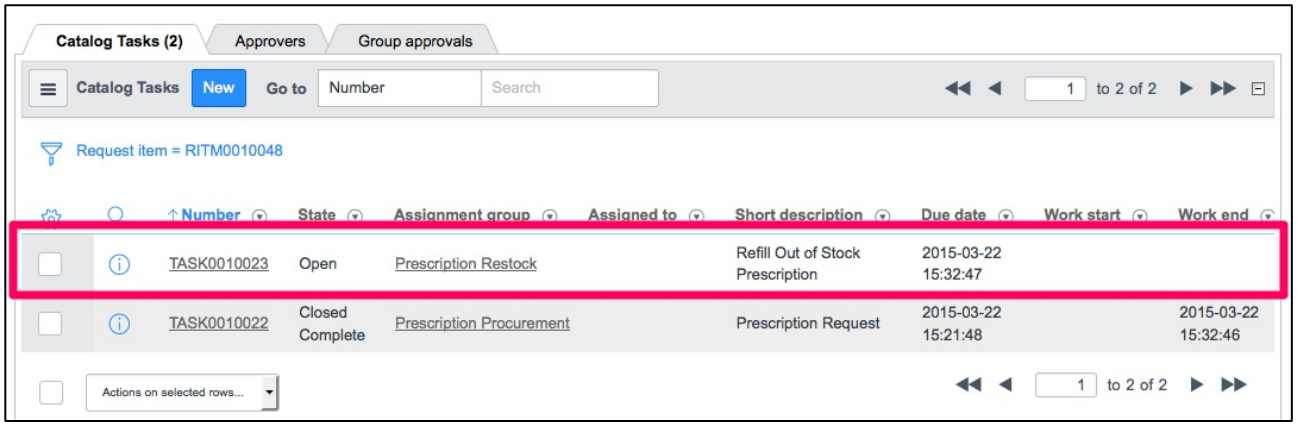


12. Approve the approval.

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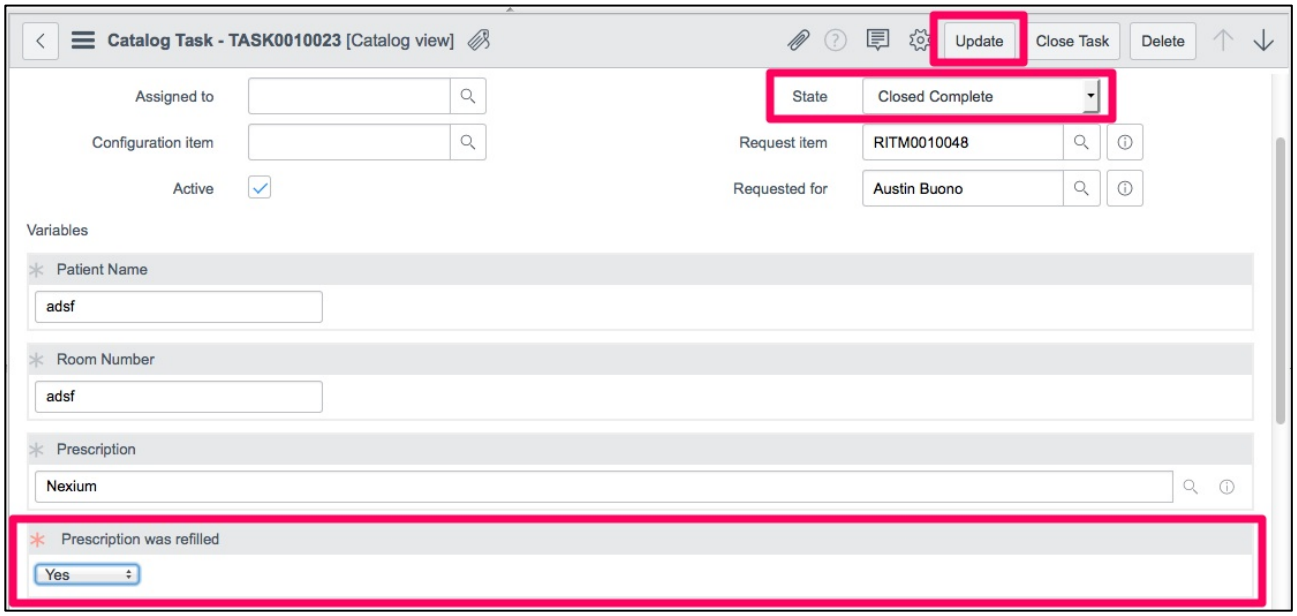
13. Navigate to second task by returning to the **Request Item**.

14. The second task is now attached and open. Select the Open task **Refill Out of Stock Prescription**



15. Set the **State** field to **Close Complete** Variable **Prescription was refilled** is now mandatory.

16. Action the Variable **Prescription was refilled.** Complete the task by selecting **Update**.



You have now completed Lab 1!

Navigate to **Lab Management > Report Lab Progress > I am done!**

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Cart Layouts in Fuji

Lab 2 Cart Layouts in Fuji

This lab explains how to customize cart layouts by removing price information, relabeling buttons, and reordering columns. Custom columns and buttons are added to provided a unique user experience.

Cart layouts are new to the Fuji release. Being able to control what is presented to the customer provides the ability to tailor a customer's experience.

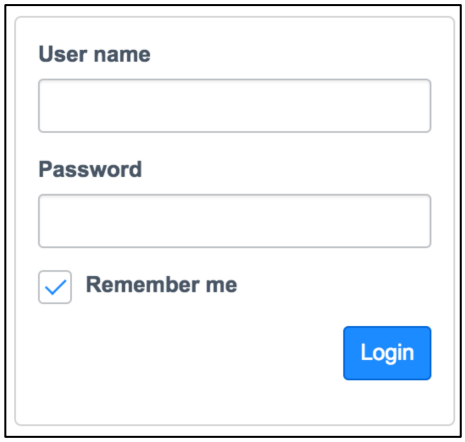
The sections below highlight:

1. How to remove components
2. Change labels
3. Change order of elements
4. Add components to layout

Log on to Your Training Instance

1. Navigate to the unique instance URL provided to you.

2. Log on with provided credentials.

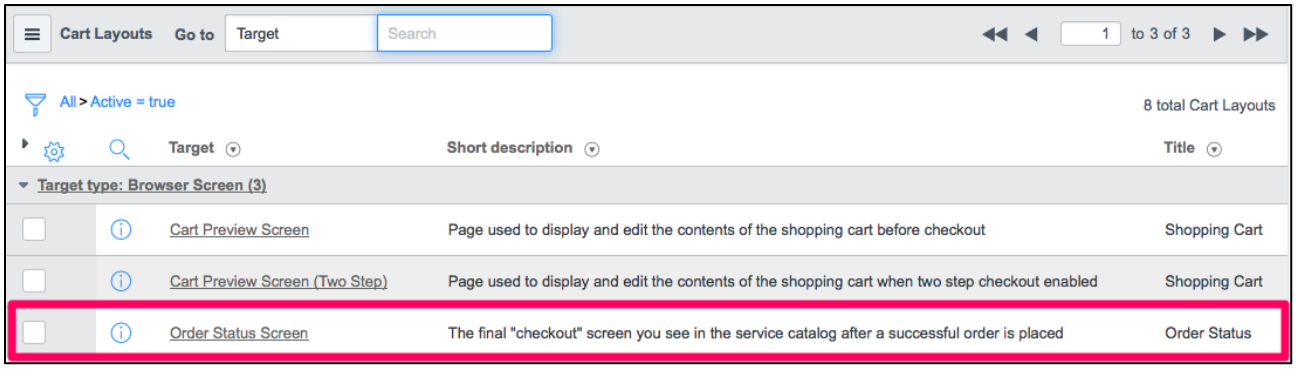


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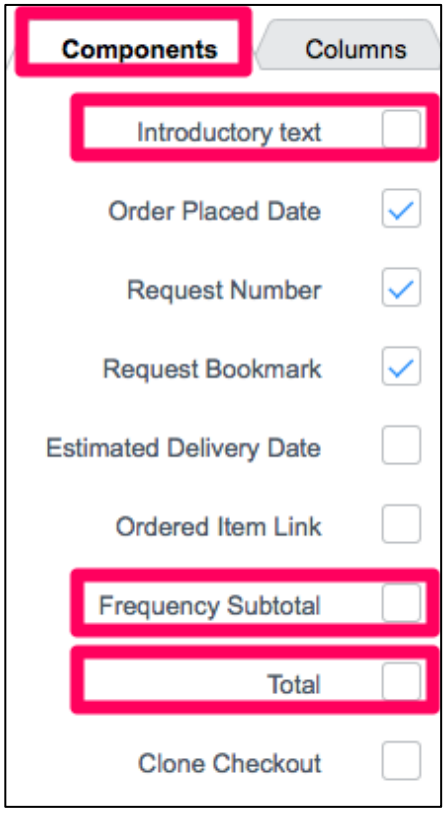
Remove Price Information

In the section below you remove the Price information from the Order Status screen.

1. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts**. The Cart Layouts form displays the Target Type Order Status Screen.



2. Navigate to the **Components** tab. Set **Frequency Total**, **Total**, and **Introductory text** to **False**.



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3. **Update** the record.

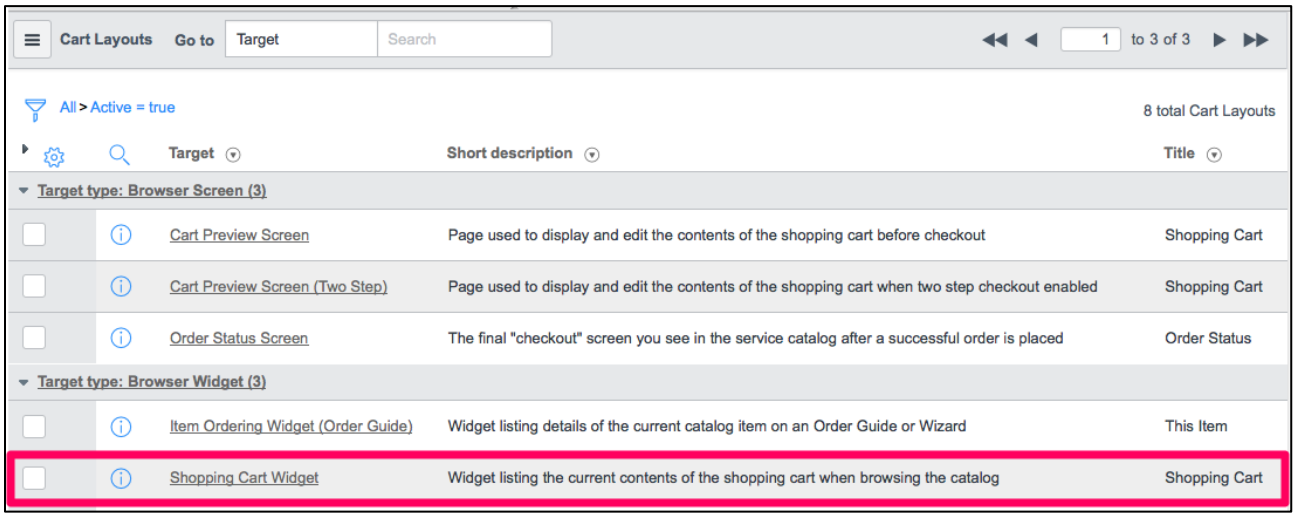
4. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts.**

Relabel Buttons

In the section below you label buttons from the Shopping Cart Widget.

1. Navigate **to Service Catalog > Catalog Definitions > Maintain Cart Layouts.**

2. Select Target Type **Shopping Cart Widget**.

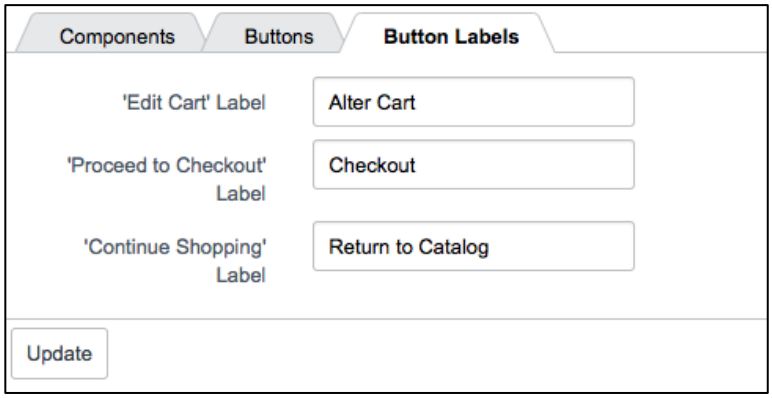


3. Navigate to the **Buttons Labels** tab**.** Enter the below information:

   'Edit Cart' Label: **Alter Cart**
   'Proceed to Checkout' Label: **Checkout**
   'Continue Shopping' Label: **Return to Catalog**

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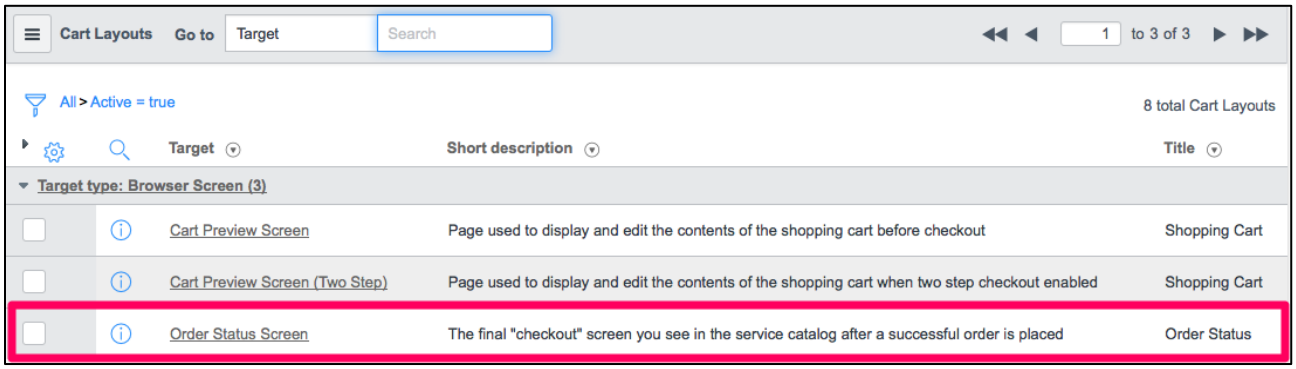
4. **Update** the Record.



Reorder Columns

In the section below you reorder the columns from the Order Status Screen.

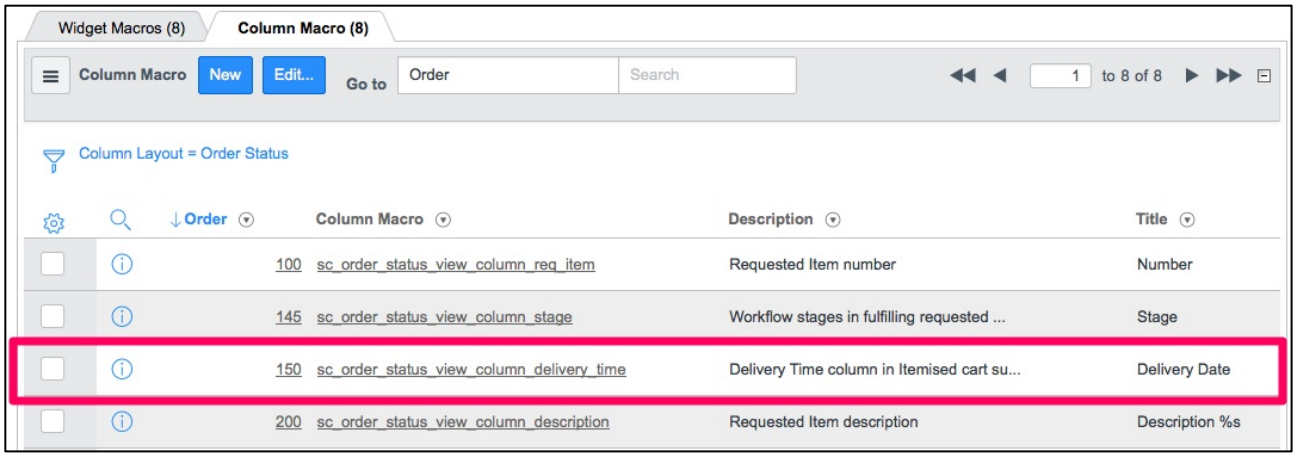
1. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts.**
2. Select Target Type **Order Status Screen**.



3. Navigate to related list **Column Macro**.

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4. Select **Delivery Date**



5. Set the **Order** to 150 and select **Update.**

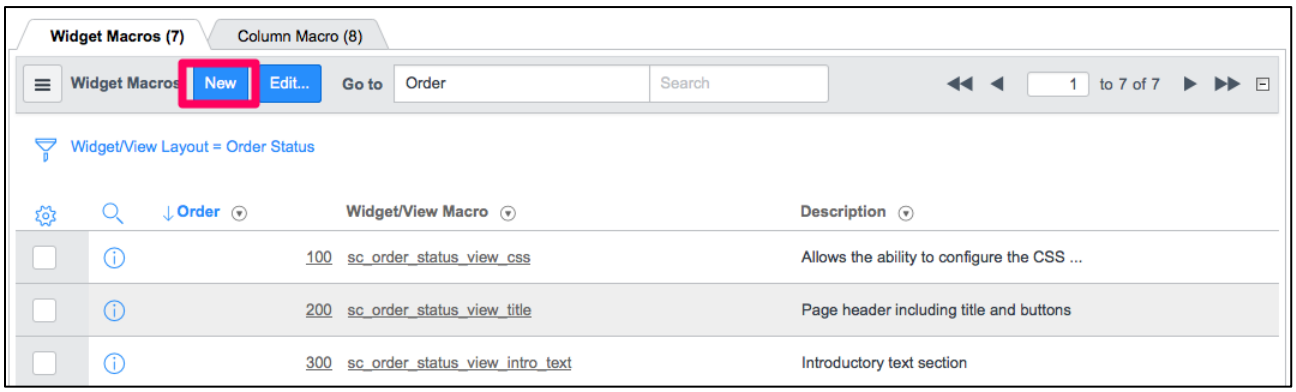


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Add Custom Widget Text

In the section below you add customer text to the Order Status Screen.

1. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts**.
2. Select Target Type **Order Status Screen**.
3. Navigate to related list **Widget Macro** select **New**.

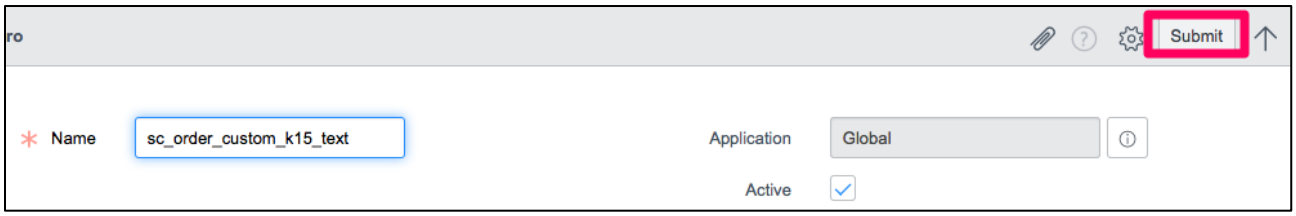


4. Enter the information below:

   Name: **sc_order_custom_k15_text**
   XML**:**

```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null"
xmlns:g2="null">
<font size="5"><center><p>Prescription Request has been
submitted</p></center></font>
</j:jelly>
```

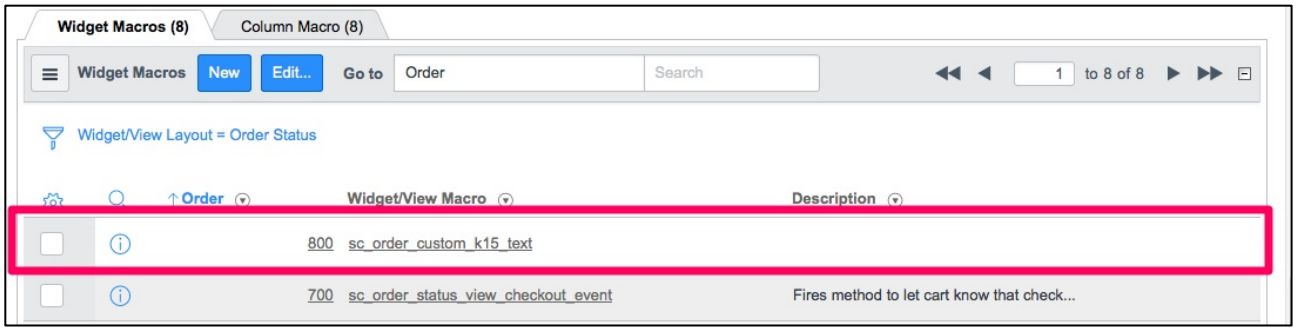
5. **Submit** the Record**.**



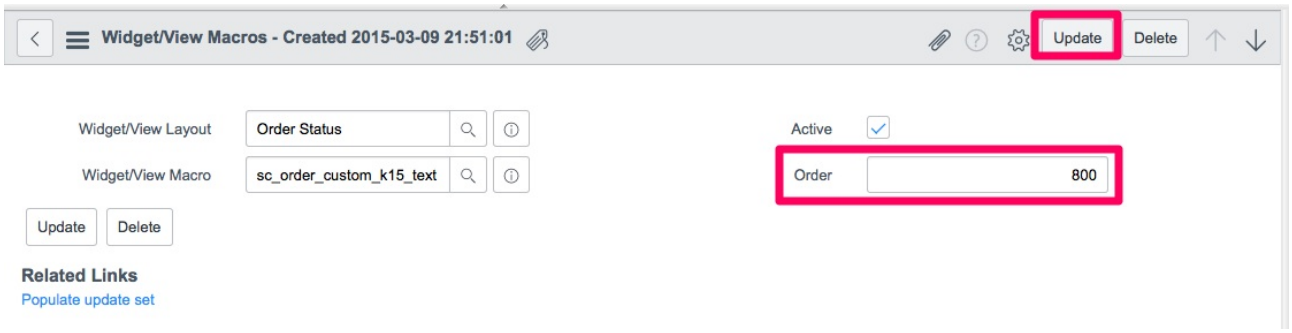
6. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts.**
7. Select Target Type **Order Status Screen**.

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8. Navigate to related list **Widget Macro,** select record **sc_order_custom_k15_text**



9. Set the **Order** to 800 and select **Update.**



Add Custom Column Macro

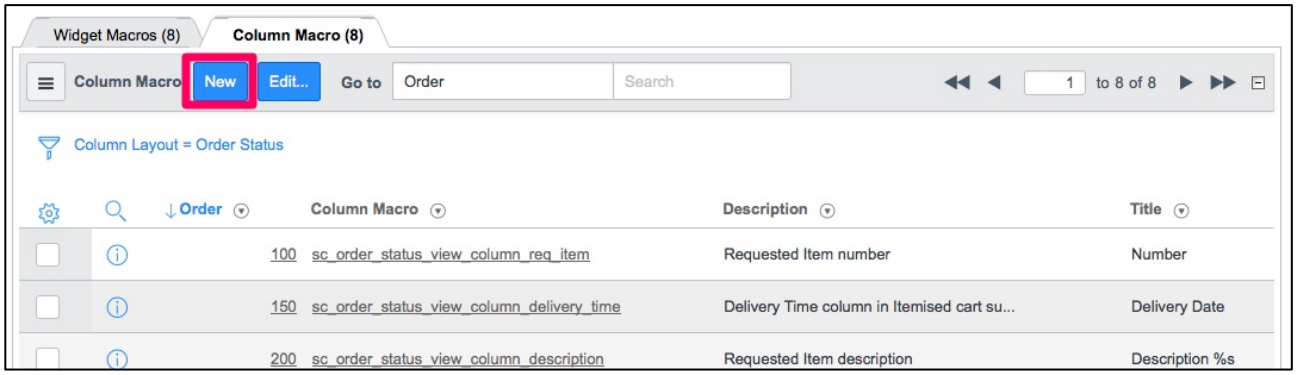
In the section below you reorder the columns from the Order Status Screen.

1. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts.**

2. **Select** Target Type **Order Status Screen**.

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3. **Navigate to related list Column Macro. Select New.**



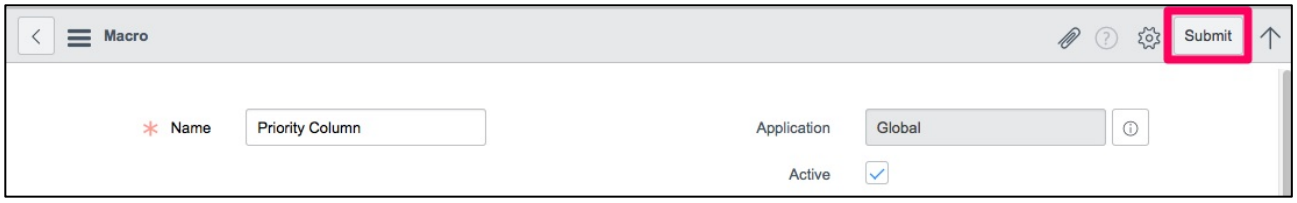
4. **Enter the information below in the Macro:**
   Name: Priority Column
   XML:

```
<?xml version="1.0" encoding="utf-8" ?>
<j:jelly trim="false" xmlns:j="jelly:core" xmlns:g="glide" xmlns:j2="null"
xmlns:g2="null">

${jvar_sc_req_item.getGr().getDisplayValue('priority')}

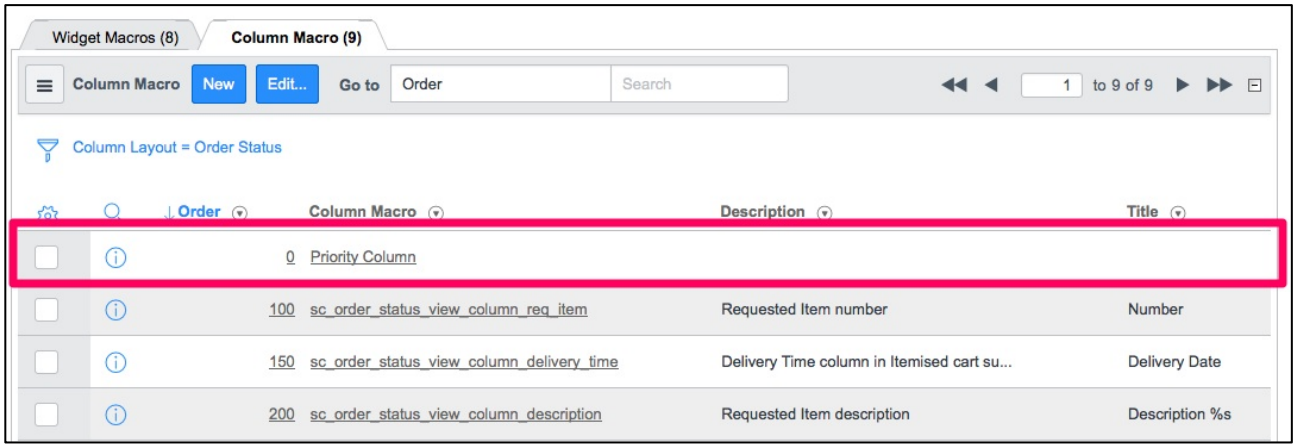
</j:jelly>
```

5. **Submit the Record.**



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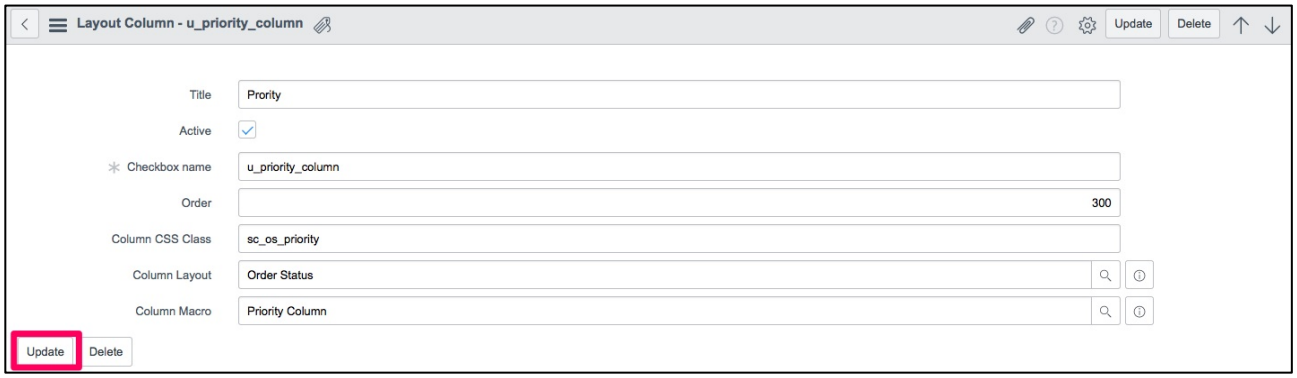
6. **Navigate to related list Column Macro. Select the** Priority Column**.**



7. **Populate the** Layout Column **with the below information**

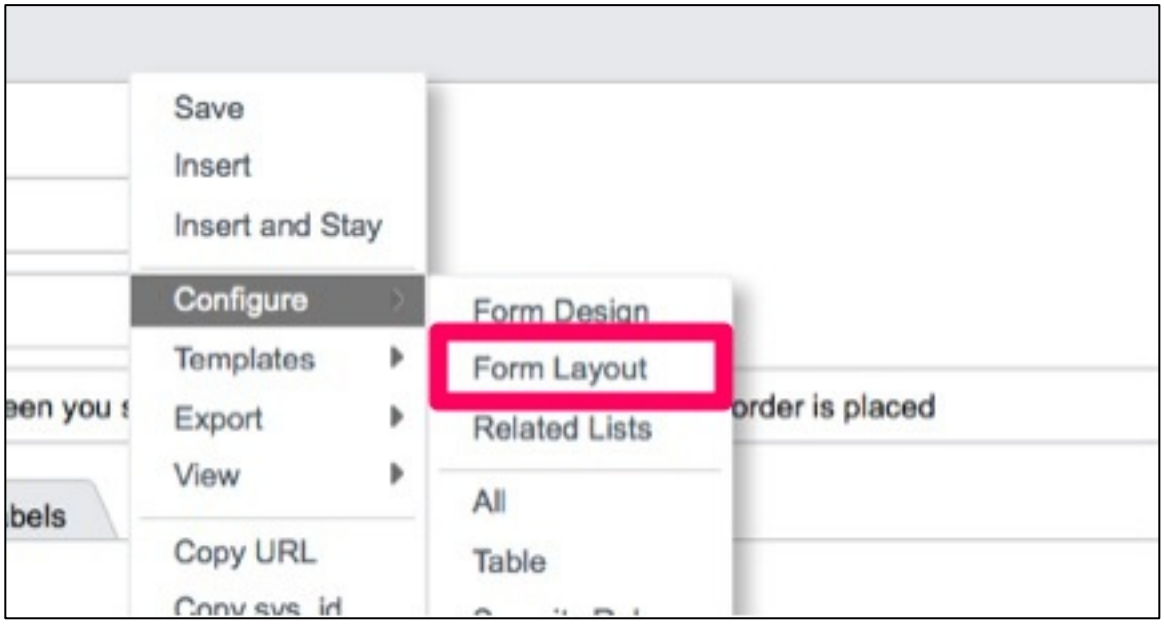
   Title: Priority
   Check box name: u_priority_column
   Order: 300
   Column CSS Class: sc_os_priority

8. Update **the record.**

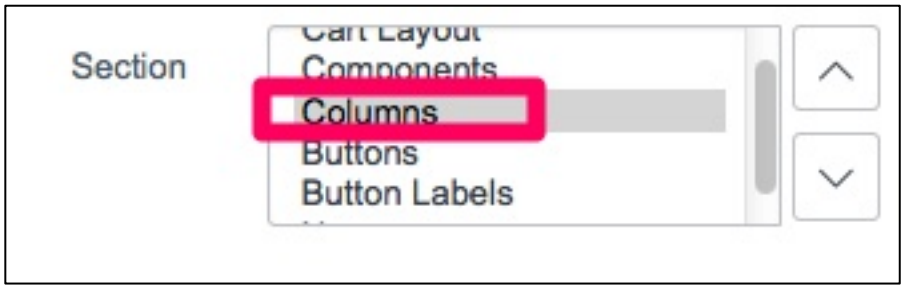


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9. **On the** Cart **Layout form, right-click the header and select Configure > Form Layout .**



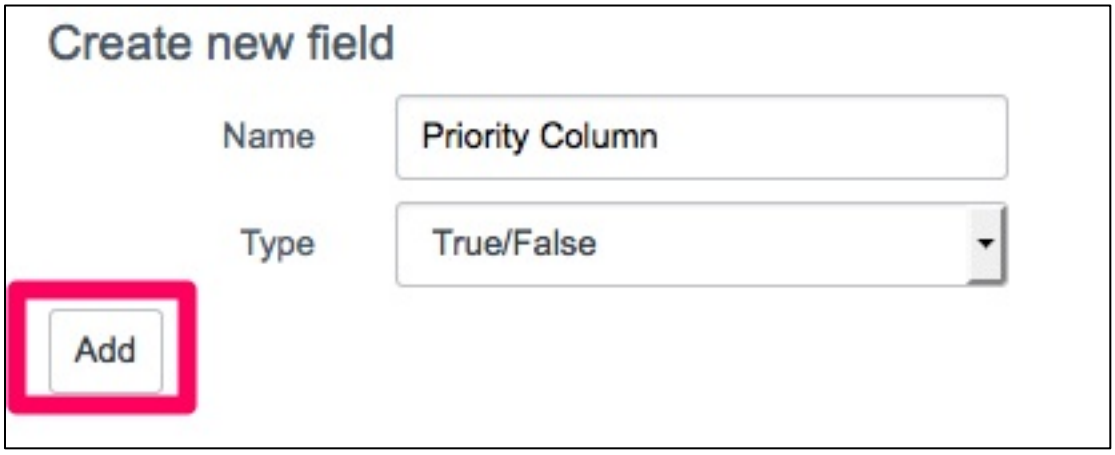
10. **Select** Section **Columns**



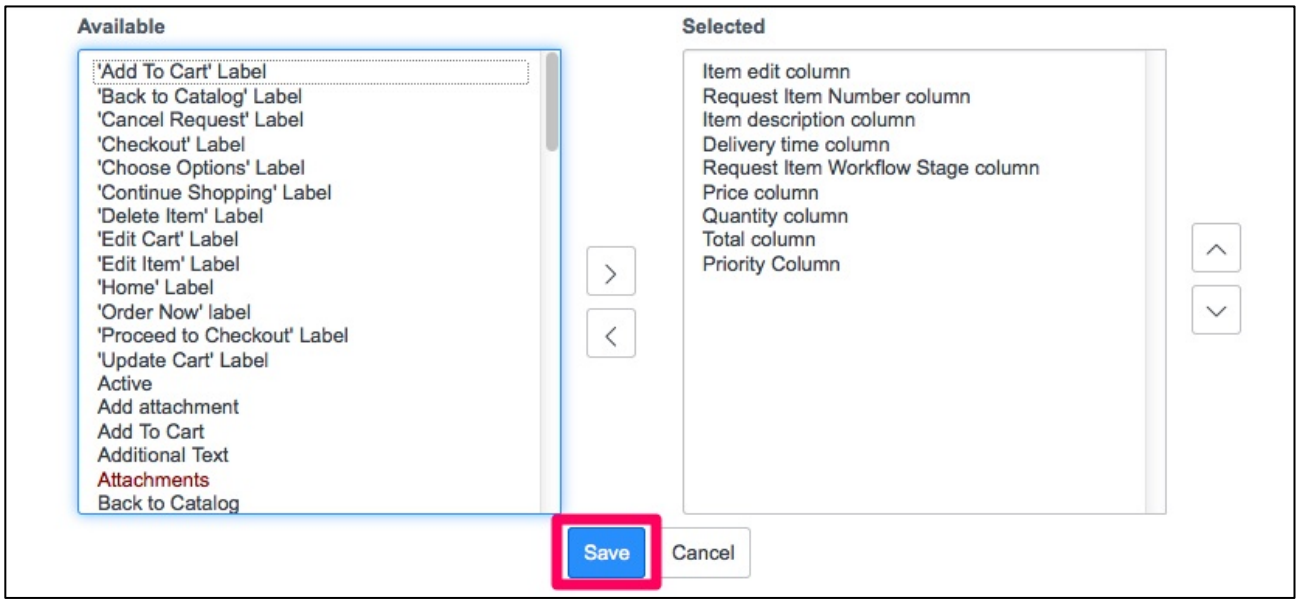
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11. **Create a new field with the below information**:

    Name: Priority Column
    Type: True/False
    Add the field.



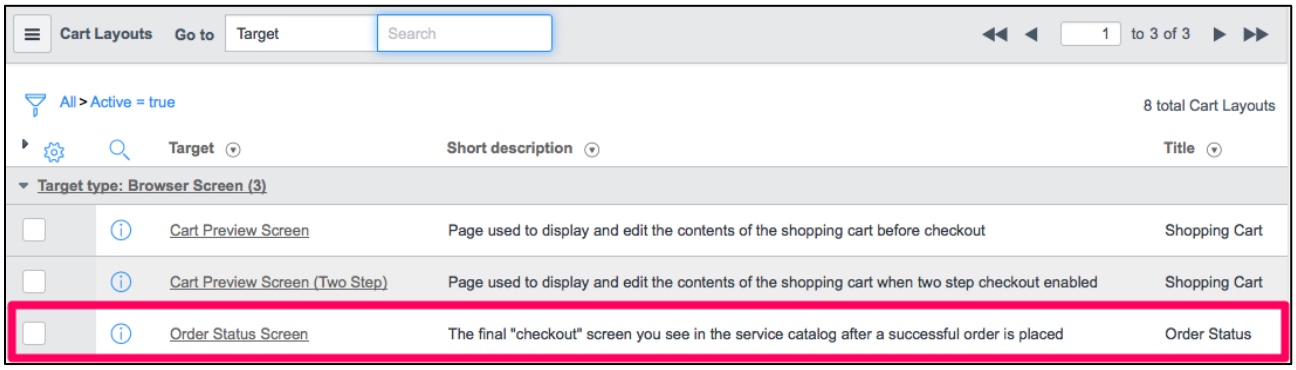
12. Select **Save.**



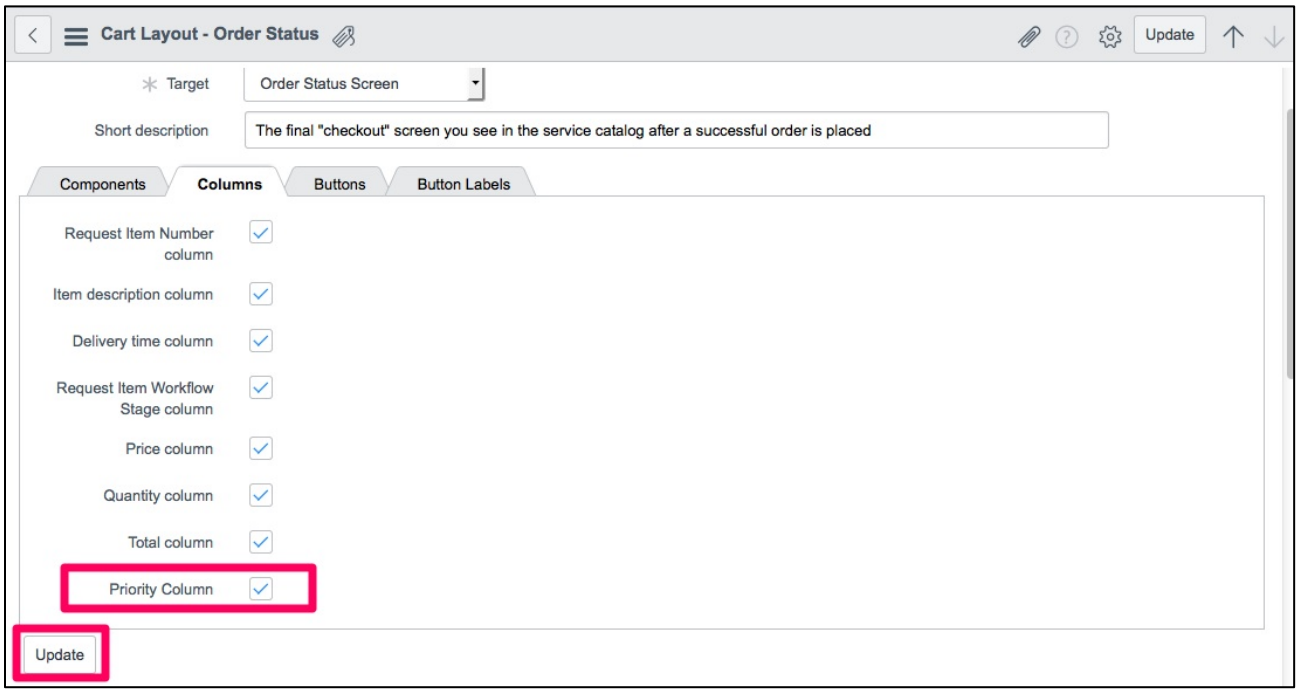
13. Navigate to **Service Catalog > Catalog Definitions > Maintain Cart Layouts.**

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14. **Select** Target Type **Order Status Screen**.



15. Navigate to the **Columns** section and set **Priority Column** to **True.**



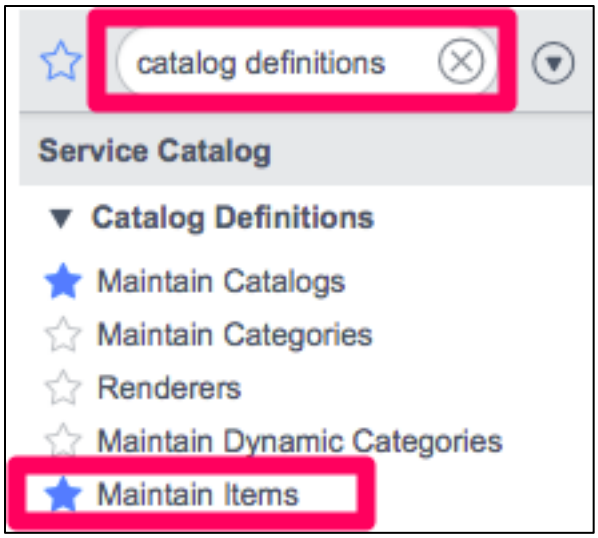
16. **Update** the record**.**

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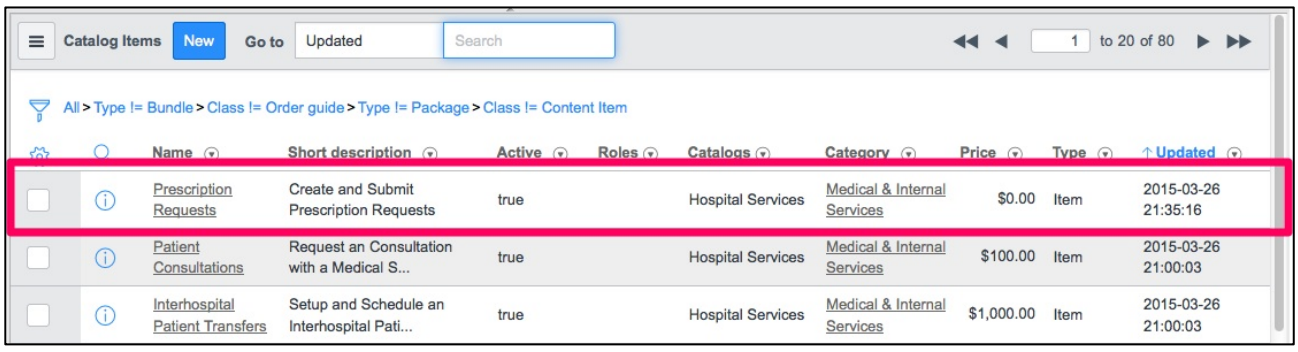
Submit Prescription Requests

In the section below, catalog item **Prescription Requests** is ordered. While ordering this item, review all customizations applied.

1. Navigate to Catalog Definitions > Maintain Items.

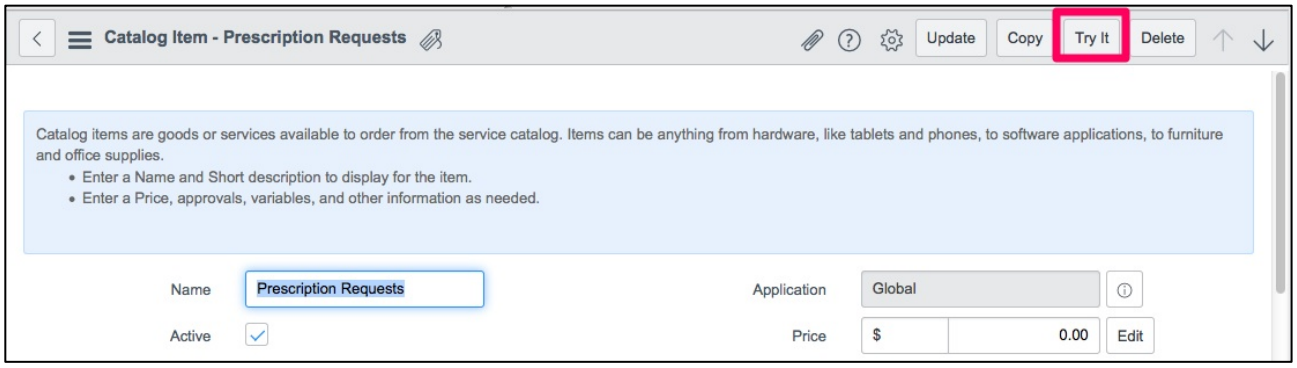


2. Select Catalog Item **Prescription Requests**.

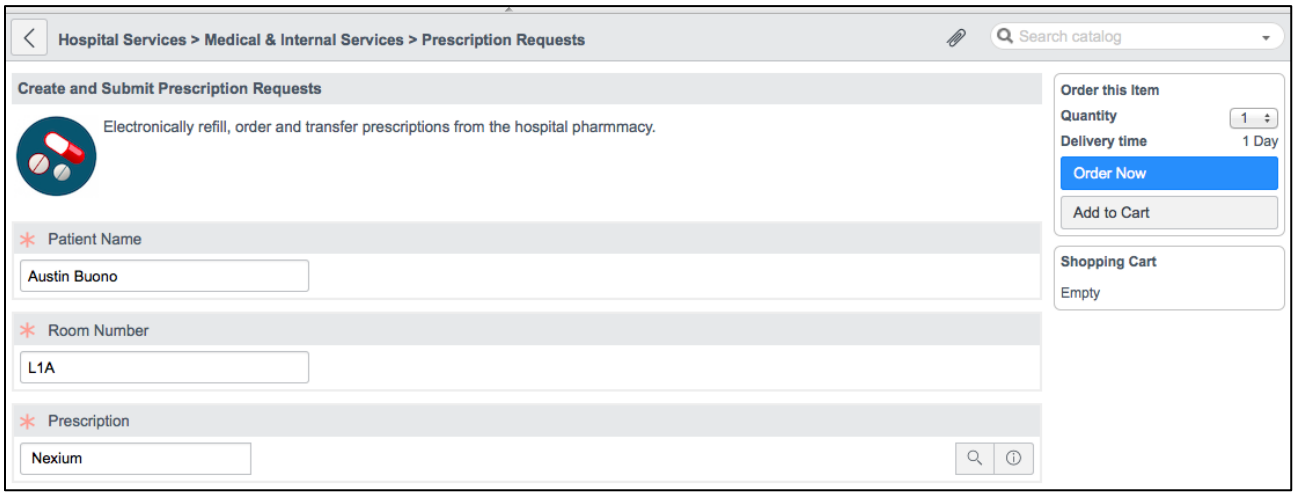


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3. Select **Try It**.

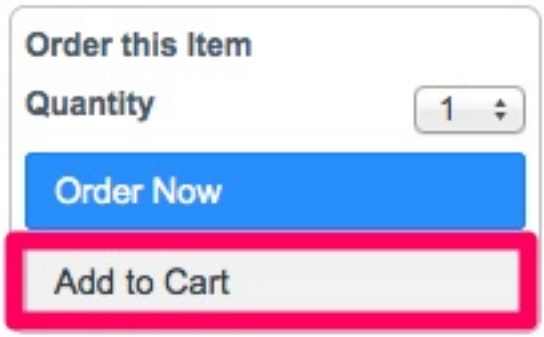


4. The Item will appear.

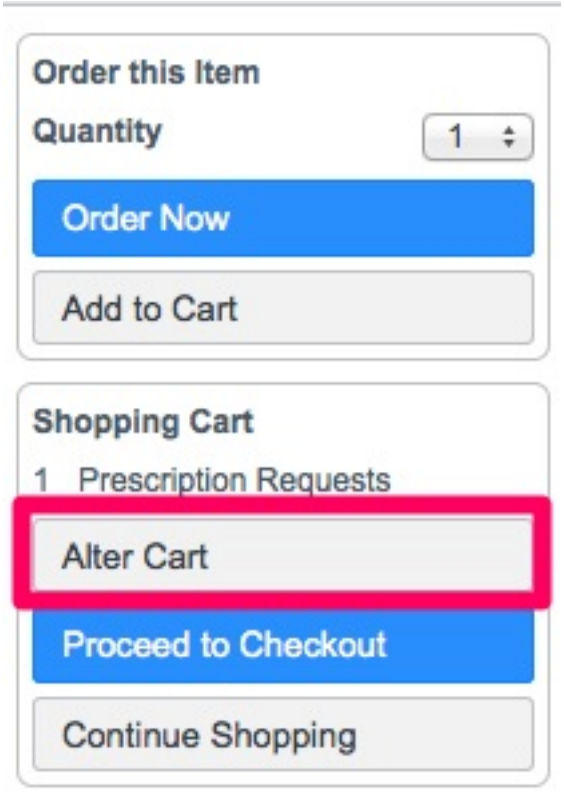


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5. Select **Add to Cart**



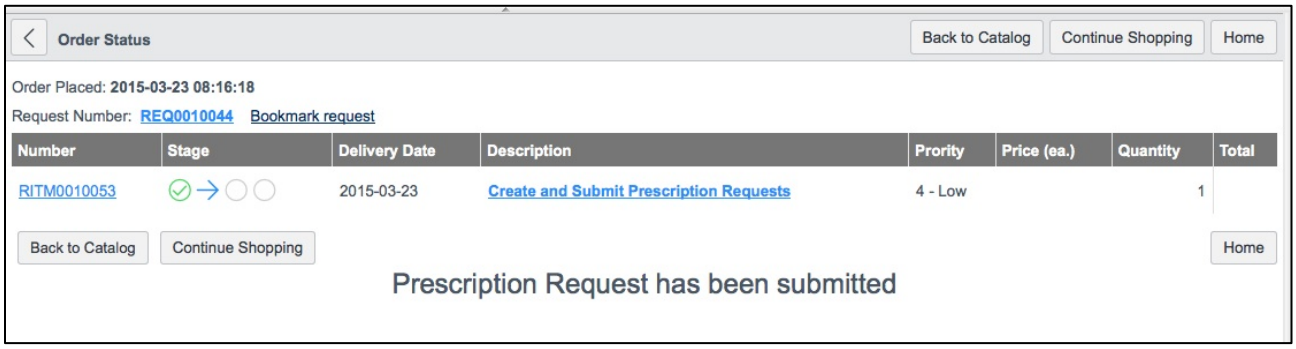
6. Review the Shopping cart and **note** your customization.



7. Select **Order Now**.

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8. Review the Order Status screen and note your changes.



You have now completed Lab 2!

Navigate to **Lab Management > Report Lab Progress > I am done!**

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