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Workflow 301

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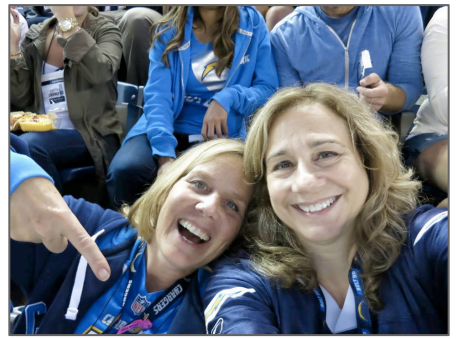
Frankie Thompson is the Lead Developer of ServiceNow Workflow.

ServiceNow since 2010



Michelle Corona is the Course Owner of Advanced System Administration and Domain Separation, Kryterion Webassessor Site Administrator, Owner of Certified System Administrator exam

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Agenda

Define Stage Sets

Create a Custom Stage Column

Use Stage Sets in Service Catalog

Workflow Engine

You made it! Have fun with Engine Ordering and Data

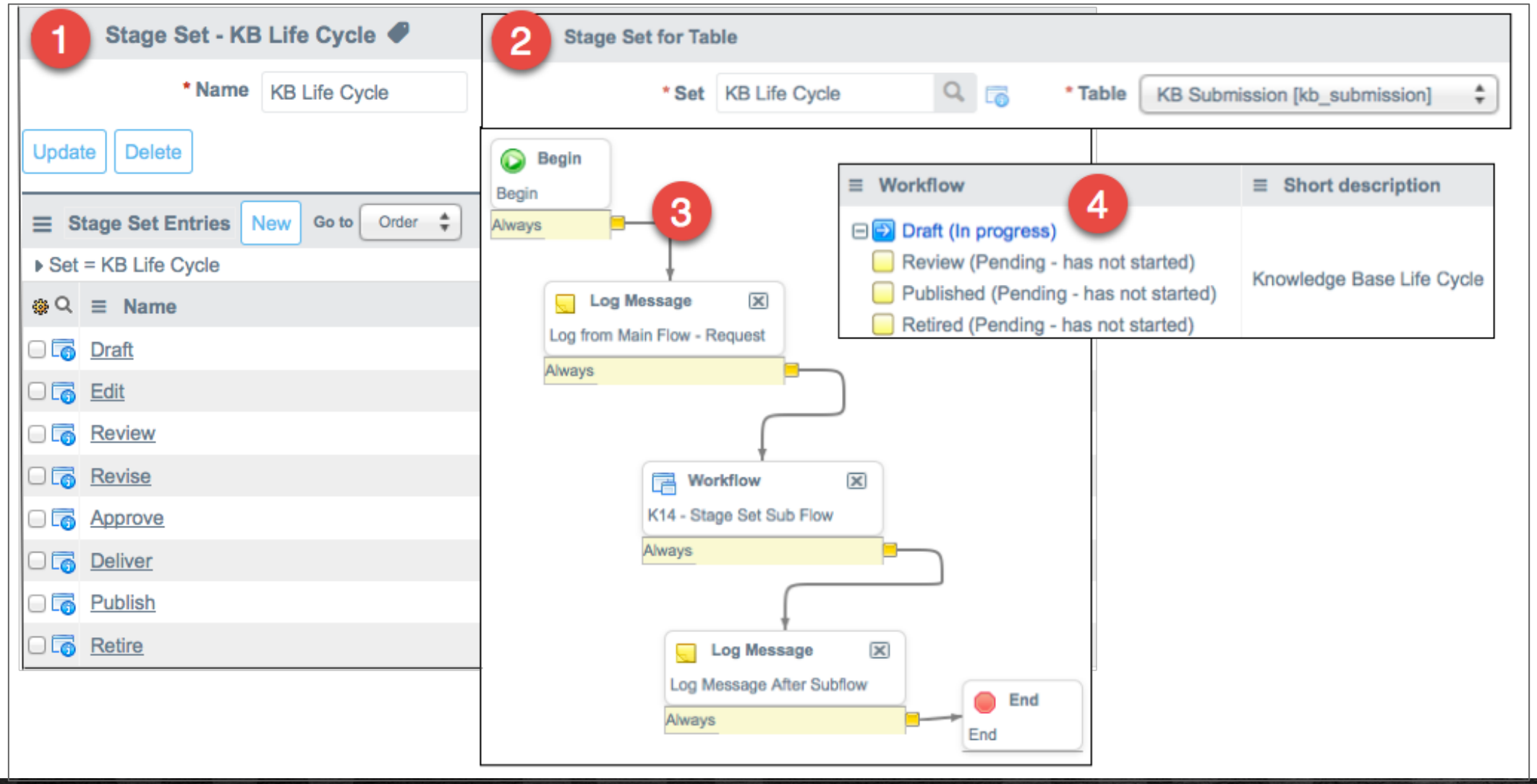
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What are Stage Sets?

- Predefined set of process notable aspects
- Provide an easy way for workflows to share Stages
- Do not have to be associated with a table
  - Can be shared across multiple workflows and tables that support similar processes

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Lab 1 Use Stage Sets



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Lab Time

Questions?

Raise your hand to get Guru help



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Review Lab 1 Stage Sets Related Links

Related Links

Export to Stage Set

Import from Stage Set

Import Stages from Choice List

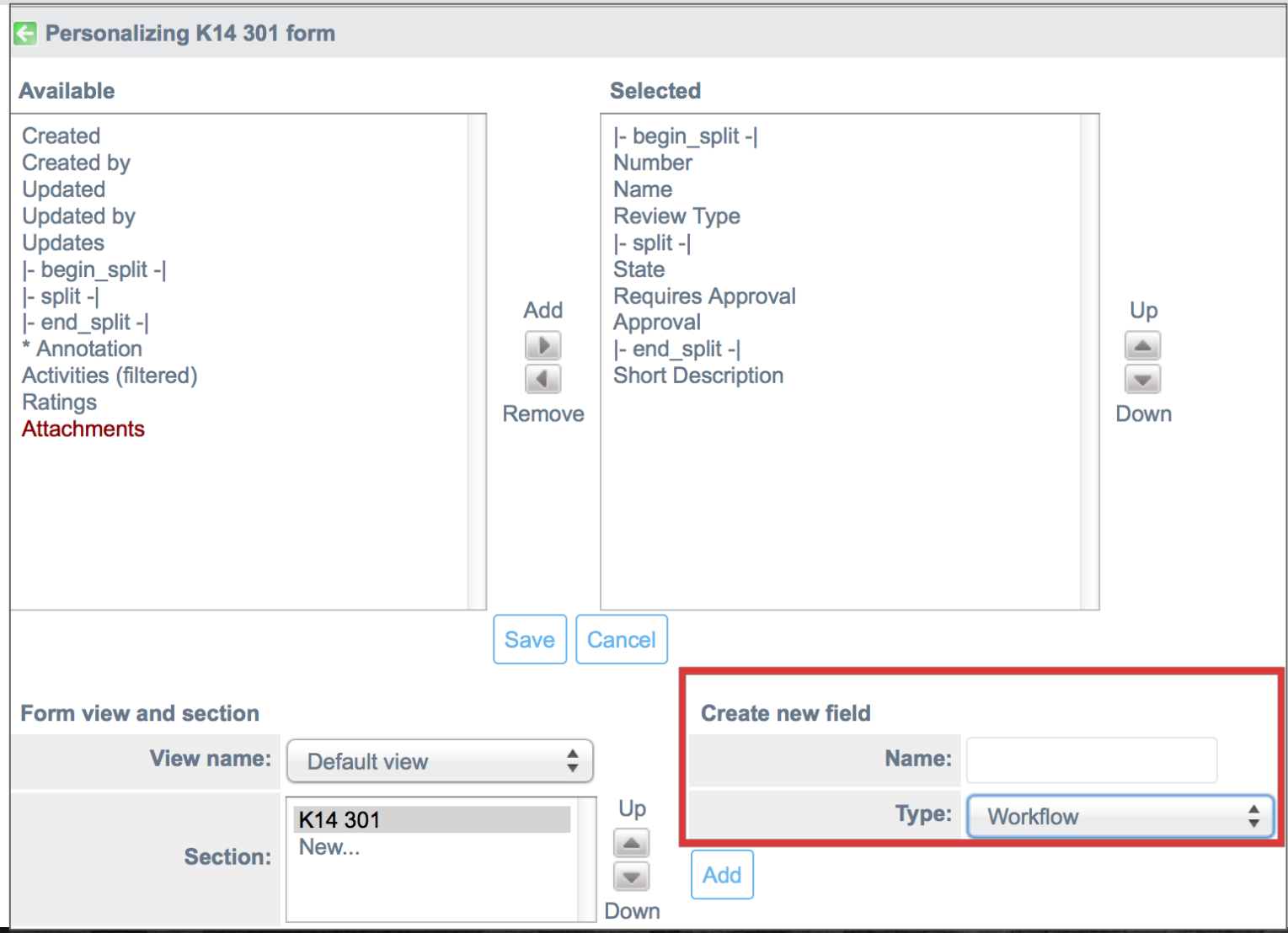
- **Export Stage Set** moves stages that have been defined for a workflow into a Stage Set
- **Import Stage Set** moves a Stage Set into the Workflow Stages list of the current Workflow Version
- **Import Stages** from Choice List translates Choice Lists into Workflow Stages

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Lab 2 Custom Stage Column

- Add a stage field of type **Workflow** to a custom application to use stages
  - If you do not declare a stage column you can still use stages but will not get icons

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



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Rendering Types for Stage Icons

Legacy Supports existing Script Includes and Business Rules that render icons

- For backward capability and not the recommended setting going forward

Linear Workflow Engine render icons in the order that is assigned to stages

- Stage state is maintained while subflows execute
- Every stage appears whether or not it executed

Main Flow Only stages in the main workflow render even if subflow stages execute

Progress Bar Does not render icons; a progress bar is used

Workflow-Driven Default; renders stage icons on the Approved, Yes, Always, and Complete condition paths

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Stage Order Setting Determines Icon Order in List

Computed Lists icons in execution order

- For backward capability and not the recommended setting going forward

User Specified Workflow designer sets the icon render order in a list that can be independent of execution order

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Questions?

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Lab 2 Review

- Order and rendering of stage icons is set in the Workflow Properties form
- Workflow designer sets how and in what order stage icons render

Default set of icon graphics

What Each Icon Means

- Current active step
- Visited
- Approval pending
- Approval approved
- Approval rejected
- Complete
- Late (Change/Request) or Canceled (Catalog)
- Skipped (Catalog only)
- On hold
- Has not yet begun

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Lab 3 Stage Sets for Application

- When designing applications it is common to use subflows for re-usable behavior
- Single Stage Set can be leveraged for workflows and subflows
- Use the Linear Renderer (better for Applications)

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Lab 3 Review Questions

- What are some of the ways to link workflows to a process?
  - Workflows can share Stage Sets
  - Workflows can share subflows that can accomplish specific goals of the process
  - Workflows can use scratchpad variables to manage information pertaining to the process

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Lab 4 Routing Workflows Using Switch

- For nearly every kind of business decision on a current record, there is an Activity to help
- Workflows offer automated decision routing Activities – If, Switch, and Join
- Wait approvals that need input

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Lab 4 Part 1: Routing Workflows using Switch

For nearly every kind of business decision on a current record, there is an Activity to help

- Workflows offer automated decision routing Activities:
  If Switch, and Join
- Wait approvals that need input



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Lab 4 Part 2: Other Routing Workflows

- Workflows can have execution paths that wait
  - For an event to fire
  - Until a state change on a specific field
  - **Wait for Event** and **Wait for Condition** Activities provide this ability
- **Branch** Activity directs a workflow to transition to multiple execution paths
  - Provides a label
  - Scripting can be used

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Lab Time

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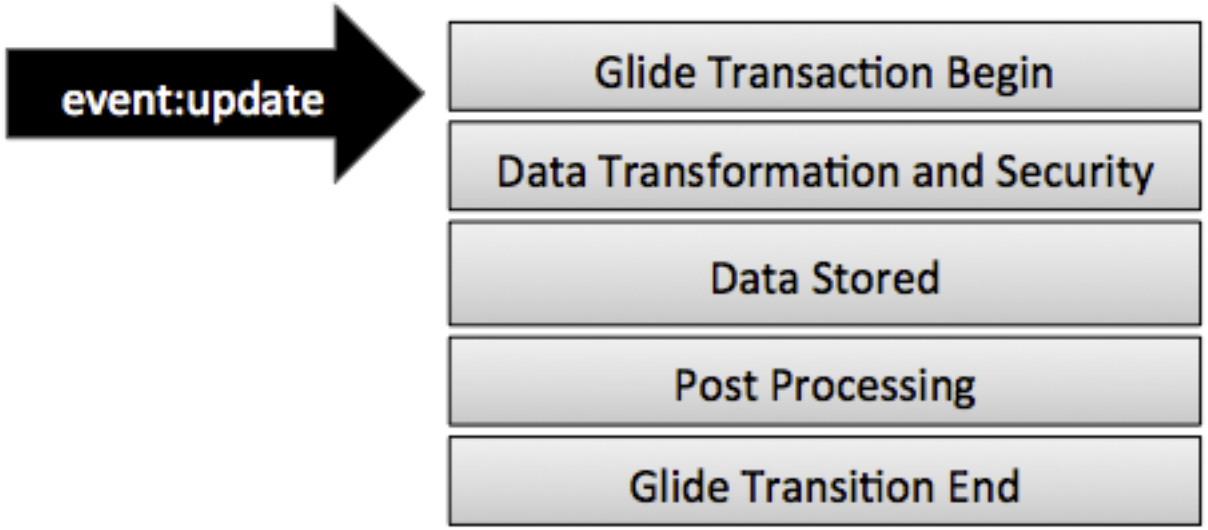
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Lab 4 Review

- Did you notice any patterns?
  - Branch Activity and Join Activity are advanced decision makers
- Standard the shape of the workflow model to respond
- There are Activities available that provide a richer, automated decision making functionality beyond the IF Activity
  - Choice List and Switch Activity are a perfect example
  - These are hard wired to a field in Current – no scripting needed!

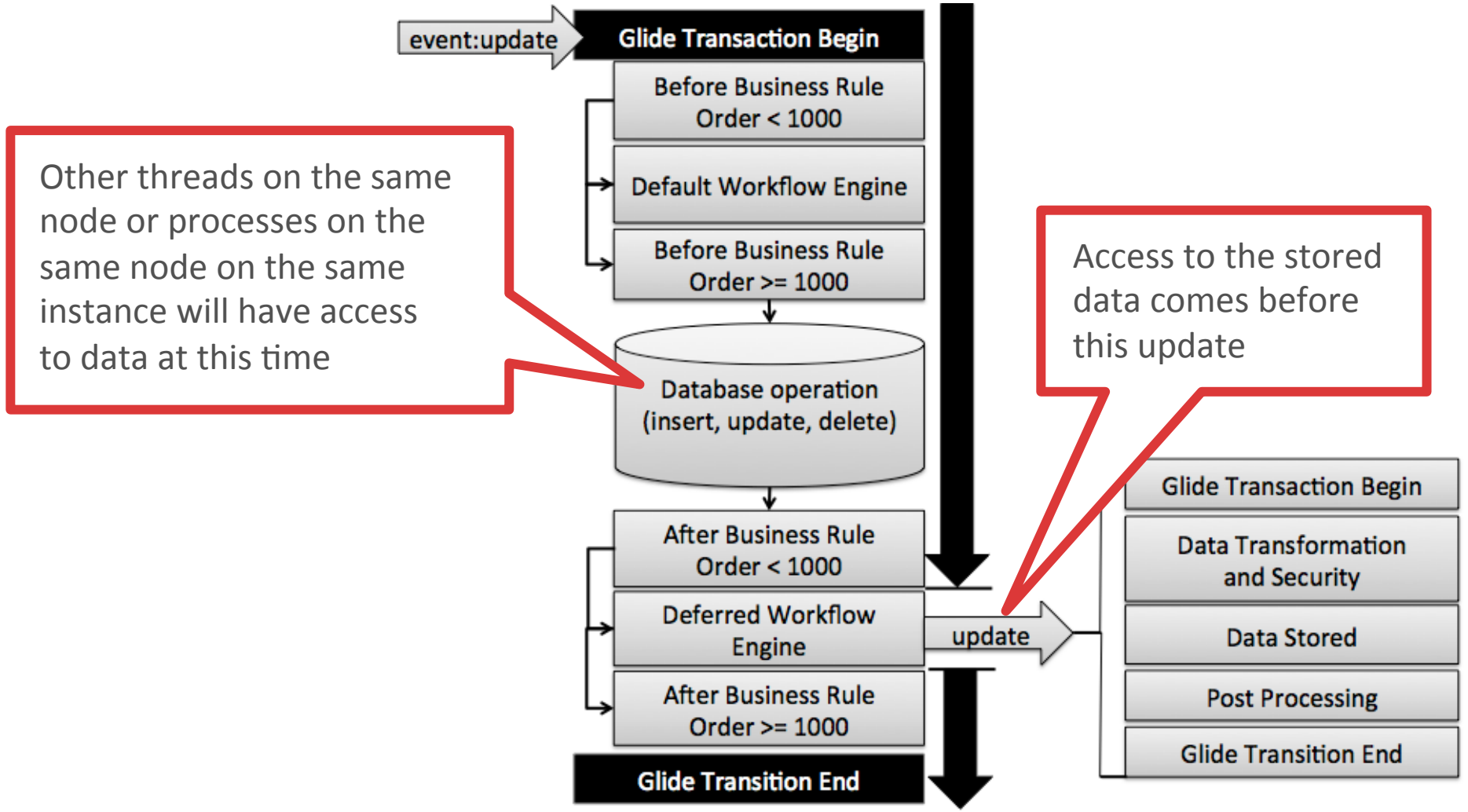
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Lab 5 Workflow Engine



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Lab 5 Workflow Engine



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Lab 5 Review

- One event = One Glide transaction
- Most business processes work very well with the Default Workflow behavior
- Behavior of a Deferred Workflow
  - Runs after the database operation
  - Data is stored when the workflow starts so a second update event is needed

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Lab 6 Engine Ordering and Data

Become familiar with the transformation and access of data as it moves through Glide transactions



Our Process Players

- Business Rule
- Workflow (Default)
- Workflow (Deferred)



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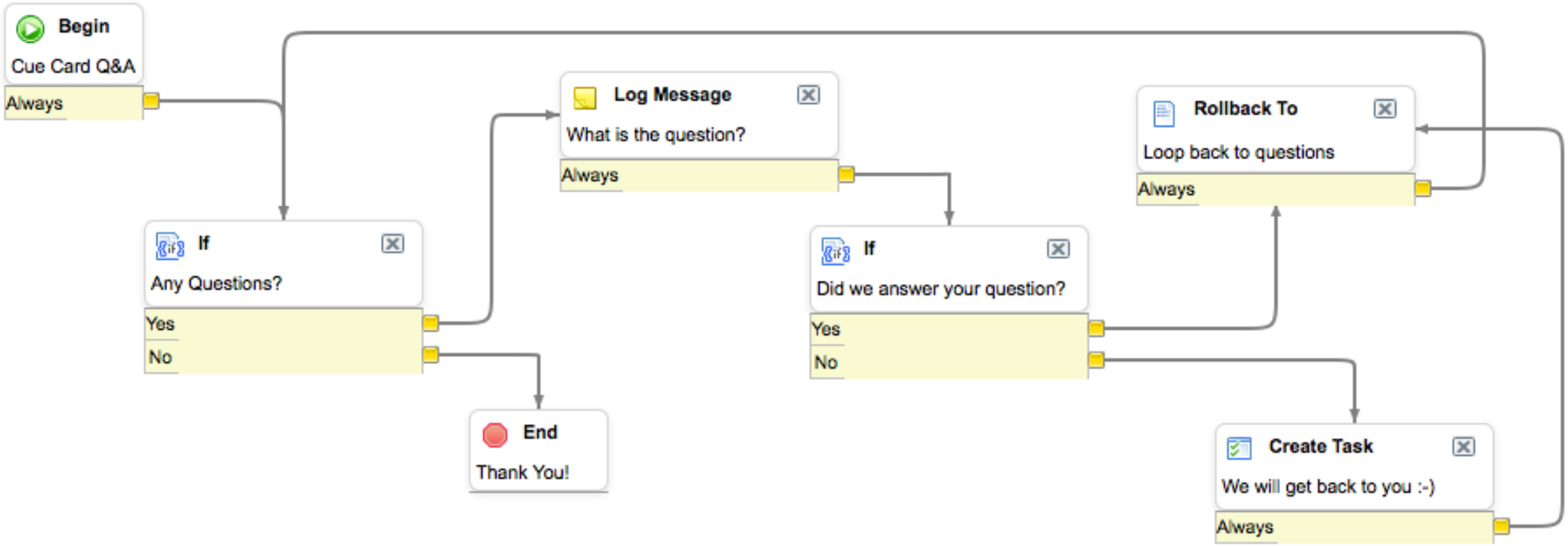
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Cue Card Q&A



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Top Takeaways

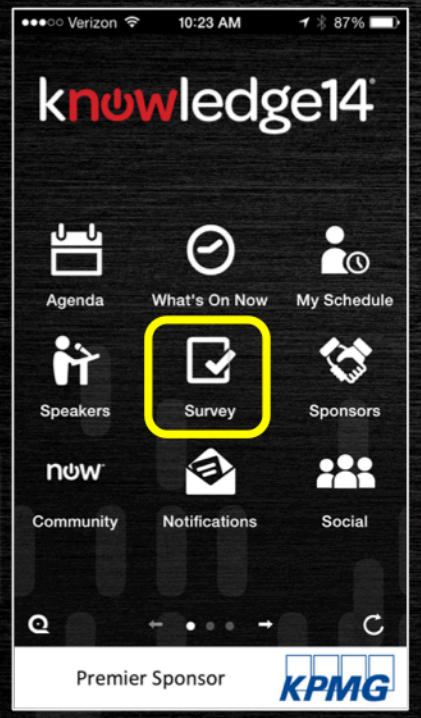
1. “We have our ways” to link Workflows to processes

2. Stages communicate and recognize the significant aspects of a process and its progress

3. Become a Workflow Designer!

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