



# Audience

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## Audience

This is an experience lab that introduces the possibilities in the platform for CSM and App Engine. **No technical expertise or prior experience is required.** Participants are free to observe the content or engage hands on with the course material.

# Service Definition of Terms

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## Personas

### Types of Fullfillers:

- Agent
- Vendor Manager
- Finance Support
- Claims Manager
- Service Representative
- Stakeholder Relations Manager
- Procurment Officer
- Registar
- Franchisor

### Types of Requesters:

- Customer
- Vendor
- Client
- Franchisee
- Contractor
- Student

#### NOTE

A requester is someone who asks for the work to be done, while a fulfiller is someone who does it. The ability to carry out these actions ties in closely with roles and therefore impacts ServiceNow licenses. Whilst these two types of users are the most common, there are others who use the instance too.

## Task types

- Case
- Incident
- Request
- Problem
- Defect
- Claim
- Exception
- Question
- File number
- Reference number
- Ticket


# CSM Agent Workspace Overview

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## Overview

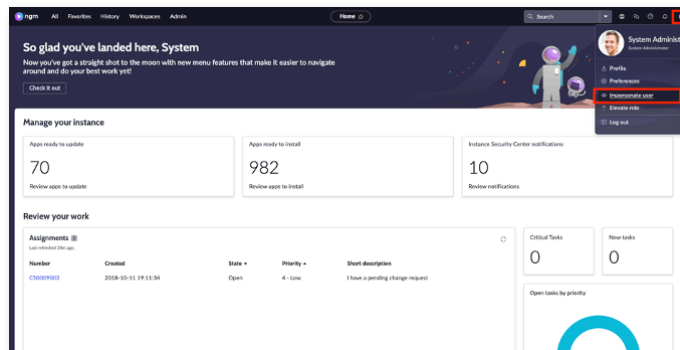
In this section, we will walk through how a Service Agent, like John, keeps track of all the requests, cases and complaints assigned to him and his team. He will identify where he needs to spend his time thanks to the out of the box agent workspace and work on the cases that require escalation and attention.

## Personas

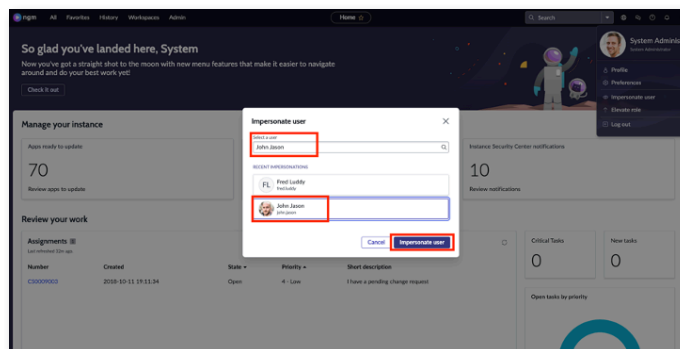
John Jason	Customer Service Agent
	John Jason is an experienced customer service agent known for his exceptional communication skills and commitment to providing top-notch service. With a friendly and approachable demeanor, he is skilled at actively listening to customers' concerns and finding effective solutions to their problems.

# Preventing important cases from falling through the cracks

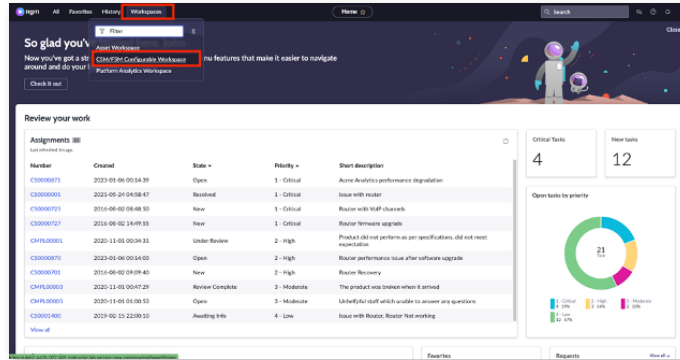
1. First, we need to pick the right user. Click the user profile picture and select Impersonate user.



2. Search for 'John' and select the service agent John Jason.

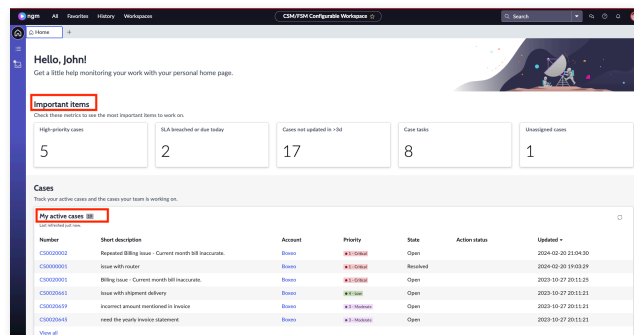


- We will now navigate to the purpose-built agent workspace. Click on Workspaces and select CSM/FSM Configurable Workspace.



- You are now on the Home page of the agent workspace that comes out of the box. Locate these 3 items by scrolling through the page:

- Important Items
- My Active Cases
- My Team's Cases



Number	Short description	Account	Priority	State	Assigned to	Updated
CS000001	Issue with router	Brevo	High	Resolved	Alex Levan	2024-02-20 19:03:29
CM4F0001001	Connectivity issues	Brevo	Medium	Open	Alex Levan	2023-10-27 20:11:00
CS0000010	Router performance issue after software upgrade	Imperial	High	Open	Alex Levan	2023-10-27 16:23:47
CS000001000	Product issue damaged	Brevo	Medium	Open	Alex Levan	2023-08-24 22:16:44
CM4F0001010	My website is broken	Brevo USA	Medium	New	Imperial	2023-08-18 15:01:03
CS0000100	Outage: SMT 80X-480 - ACME Corporation Analytics Suite 2014	Brevo	High	Awaiting Info	Emily Levan	2023-07-17 23:11:49

- Under the Important Items, we see that there is a case where the SLA is breached, we need to escalate the case immediately. Click on the number in the SLA breached tile to be taken to the list of cases.

**Important items**  
Check these metrics to see the most important items to work on.

High-priority cases: 5	SLA breached or due today: 2	Cases not updated in >3d: 17	Case links: 8	Unassigned cases: 1
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**Cases**  
Track your active cases and the cases your team is working on.

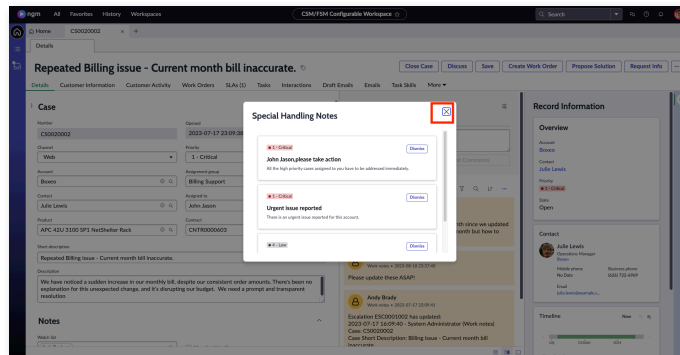
**My active cases**

Number	Short description	Account	Priority	State	Action status	Updated
CS000002	Resolved Billing Issue - Current month bill inaccurate.	Brevo	High	Open		2024-02-20 21:04:30
CS000001	Issue with router	Brevo	High	Resolved		2024-02-20 19:03:29
CS000001	Billing Issue - Current month bill inaccurate.	Brevo	High	Open		2023-10-27 20:11:25
CS0000441	Issue with shipment delivery	Brevo	High	Open		2023-10-27 20:11:21
CS0000109	Incorrect amount mentioned in invoice	Brevo	High	Open		2023-10-27 20:11:21
CS0000445	read the yearly invoice statement	Brevo	High	Open		2023-10-27 20:11:21

- On the list, we can see the case, which SLA is breached, stage, and by how many minutes/days alongside other information. Click on the case number to be taken to the case record.

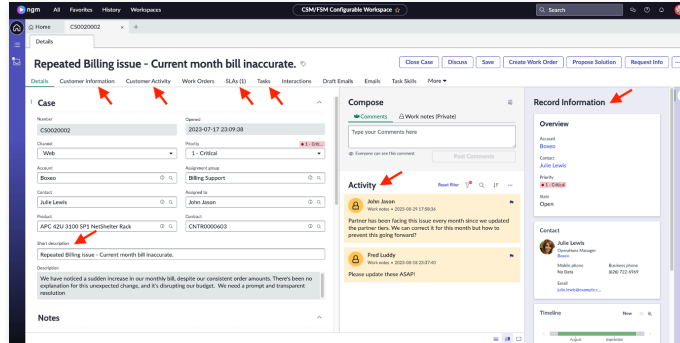
Task	SLA Definition	Type	Target	Stage T	Business time left	Business elapsed time	Business elapsed percentage	Start time	Stop time
CSD000001	CNTR000007 - Priority 2 resolution(2h)	SLA		In progress	1 Day 9 Hours 33 Minutes	25 Hours 4 Minutes	21.4%	2024-02-19 12:07:30	
CSD000002	Case - Priority 3 resolution (8 hour)	SLA		In progress	0 Seconds	17 Days 22 Hours 14 Minutes	5,376.4%	2023-08-18 22:27:40	

7. First, you'll see Special Handling Notes. These notes automatically pop up based on the values on the case. You can have multiple special handling notes to alert your agents for better customer service. Click X to close the special handling notes window.

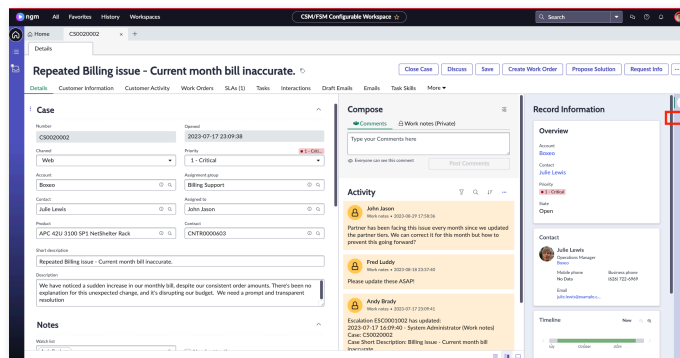


8. On the case page, we can see all the details such as customer information, work orders, SLA, tasks etc. John can also see the details about the issue to quickly decide the next steps to resolve the issue.

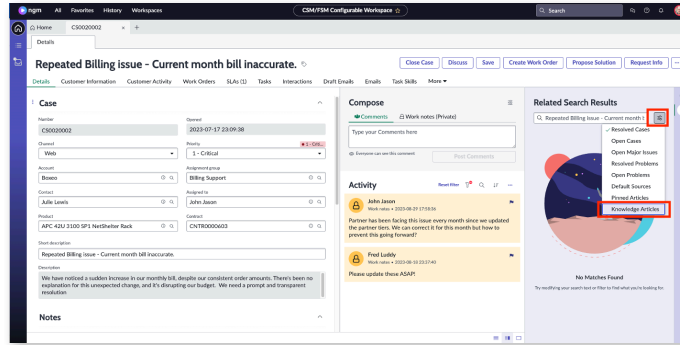




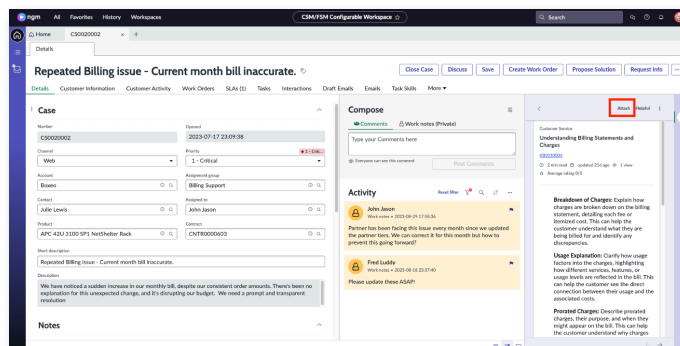
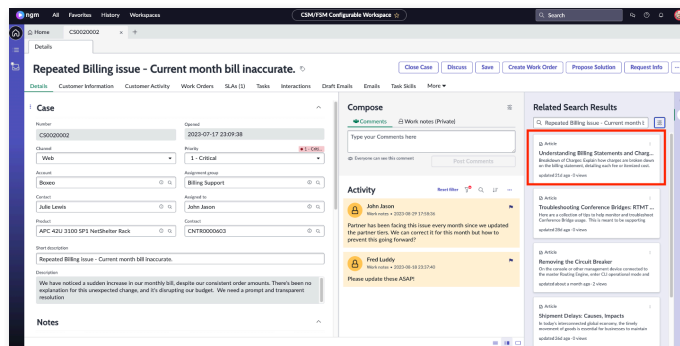
- John will leverage out of the box features to search for similar cases that were resolved and look for helpful knowledge articles. Click on the Agent Assist icon as shown on the screenshot below

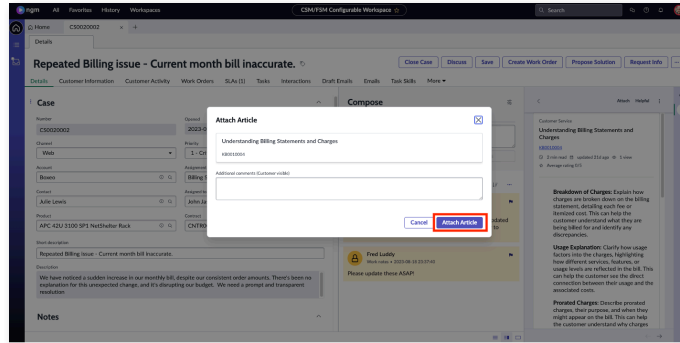


- Click on the hamburger icon as shown on the picture to see all the out of the box search options. Currently you are seeing all similar resolved cases. Click on Knowledge Articles.



11. We can now see relevant Knowledge Articles that gets surfaced automatically. Click on the first article and then click **Attach** to attach it to the case and share it with the customer.

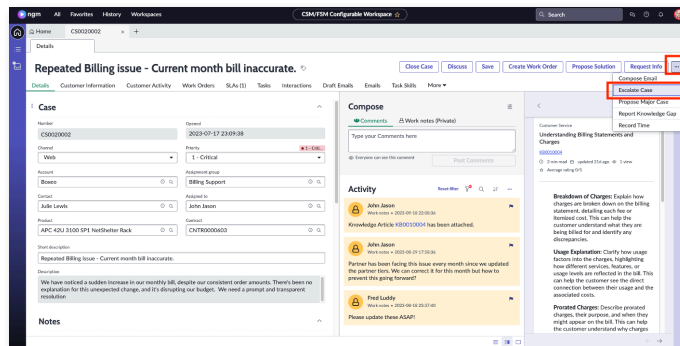




**NOTE**

If you include 'Additional Comments (Customer Visible)' before clicking on Attach Article, the article will be visible to the customer via the customer portal including your comment.

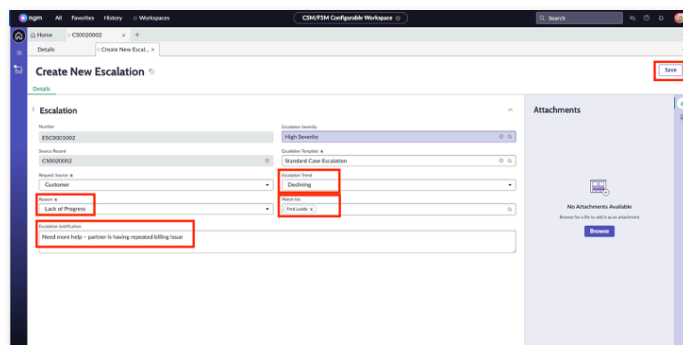
- Finally, John will escalate the case before moving on to other cases in his queue. Click on the three-dot icon and select Escalate Case.



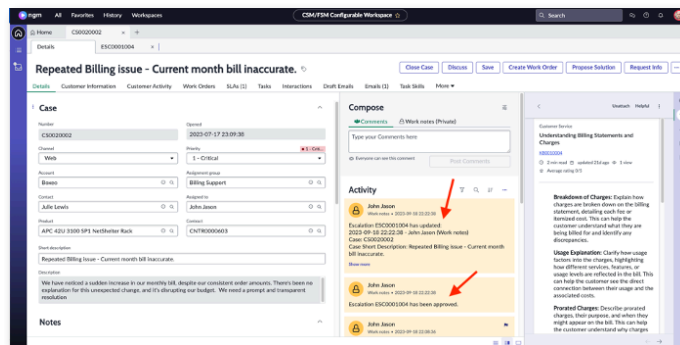
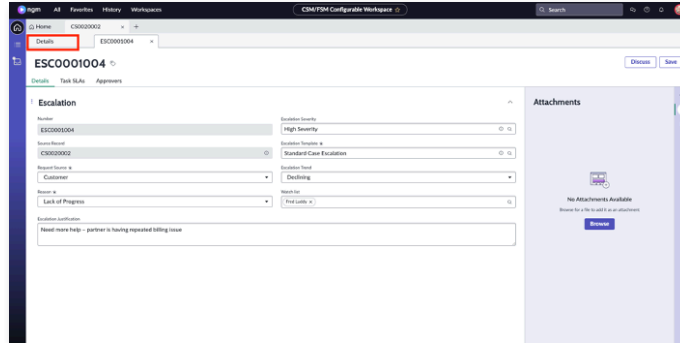
- On the Case Escalation page, select these values:

Field	Value
Reason	Lack of Progress
Escalation Trend	Declining
Watch List	Fred Luddy
Escalation Justification	Need more help - partner is having repeated billing issue.

Click Save.



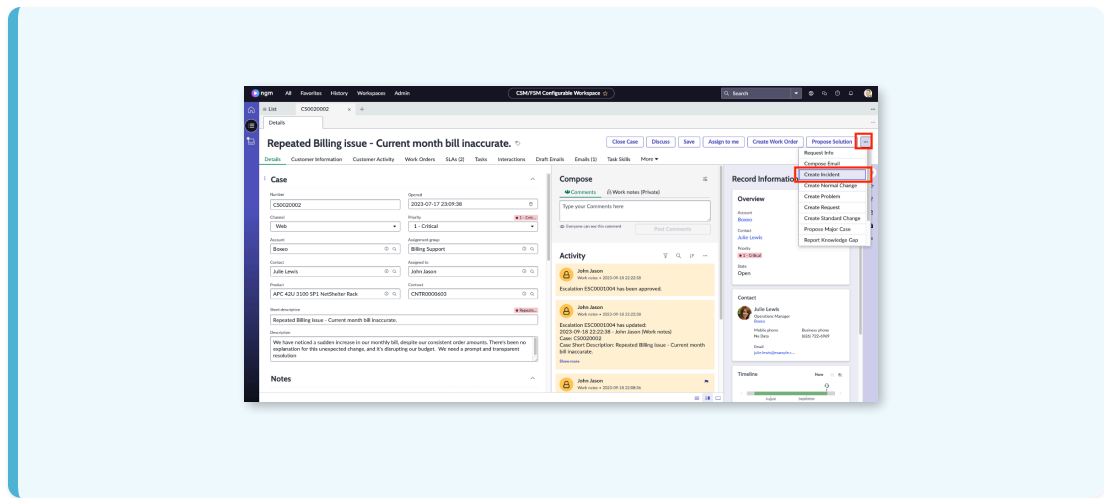
- Click on the **Details** tab to go back to the case. Observe the escalation that is automatically attached to the case.



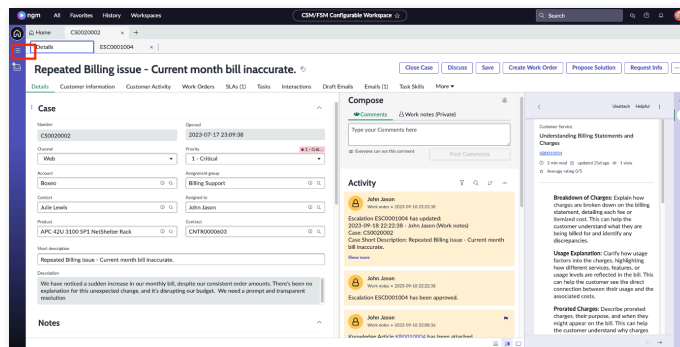
Great Job! John now has escalated the case and added his manager as watch list. He did all this work by using out of the box features!

### ! INFO

You can also create an incident, problem or a change request right from this case as shown below. For example, if the billing issue was due to the billing software that is used, you could easily create an incident right from the case and assign it to the IT team.



15. We will continue working on the agent workspace. Click on the hamburger icon to go to the case and task lists assigned to John.



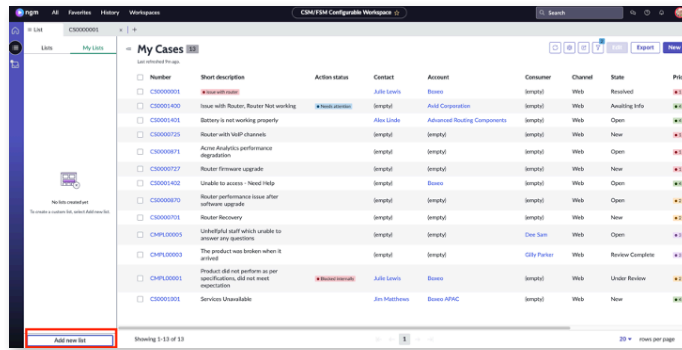
16. John has quick access to cases and tasks that matter to him. These lists are automatically updated and always show real-time data.

Number	Short description	Action status	Contact	Account	Consumer	Channel	State	Priority
C5000001	Issue with Router. Router Not working	New/Unassigned	John Lewis	Brown	Impetal	Web	Resolved	★1/5
C5000400	Issue with Router. Router Not working	New/Unassigned	John Lewis	Brown	Impetal	Web	Awaiting Info	★1/5
C5000401	Battery is not working properly	New/Unassigned	Alice Lewis	Advanced Routing Components	Impetal	Web	Open	★1/5
C5000725	Router with VoIP channels	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000871	Acme Router's performance degradation	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000727	Router firmware upgrade	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000402	Unable to access - Need Help	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000870	Router performance issue after software upgrade	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000701	Router Recovery	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
CMPL00001	Unhelpful staff which unable to answer any questions	Completed	Impetal	Impetal	Clay Parker	Web	Open	★1/5
CMPL00002	The product was broken when it arrived	Completed	Impetal	Impetal	Clay Parker	Web	Review Complete	★1/5
CMPL00001	Product did not perform as per specifications, did not meet expectations	Completed/Review	John Lewis	Brown	Impetal	Web	Under Review	★1/5
C5000001	Services Unavailable	Completed	Jim Matthews	Brown AFAC	Impetal	Web	New	★1/5

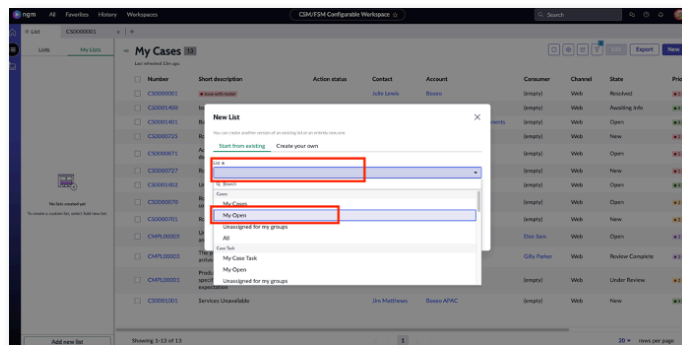
17. Users like John can easily create their own lists when needed without creating IT Backlog. We will now create Critical Cases lists that are assigned to John. Click on My Lists.

Number	Short description	Action status	Contact	Account	Consumer	Channel	State	Priority
C5000001	Issue with Router. Router Not working	New/Unassigned	John Lewis	Brown	Impetal	Web	Resolved	★1/5
C5000400	Issue with Router. Router Not working	New/Unassigned	John Lewis	Brown	Impetal	Web	Awaiting Info	★1/5
C5000401	Battery is not working properly	New/Unassigned	Alice Lewis	Advanced Routing Components	Impetal	Web	Open	★1/5
C5000725	Router with VoIP channels	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000871	Acme Router's performance degradation	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000727	Router firmware upgrade	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000402	Unable to access - Need Help	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000870	Router performance issue after software upgrade	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
C5000701	Router Recovery	Completed	Impetal	Impetal	Impetal	Web	Open	★1/5
CMPL00001	Unhelpful staff which unable to answer any questions	Completed	Impetal	Impetal	Clay Parker	Web	Open	★1/5
CMPL00002	The product was broken when it arrived	Completed	Impetal	Impetal	Clay Parker	Web	Review Complete	★1/5
CMPL00001	Product did not perform as per specifications, did not meet expectations	Completed/Review	John Lewis	Brown	Impetal	Web	Under Review	★1/5
C5000001	Services Unavailable	Completed	Jim Matthews	Brown AFAC	Impetal	Web	New	★1/5

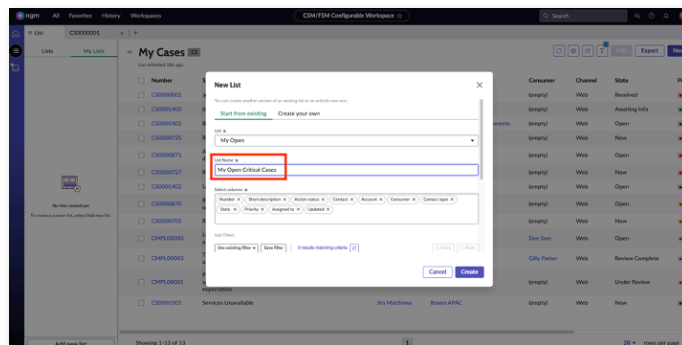
18. Click on Add new list



19. On the pop-up screen, click on List and select My Open.

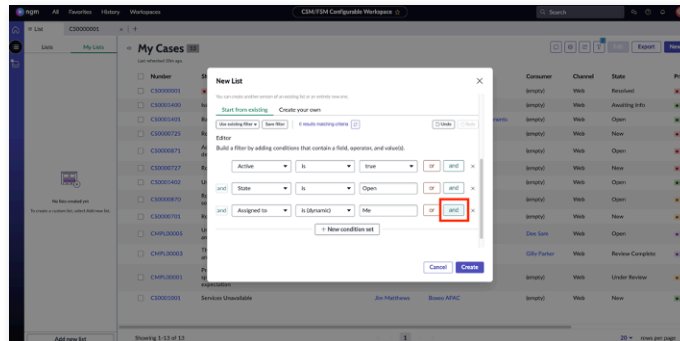


20. Populate List Name: "My Open Critical Cases"

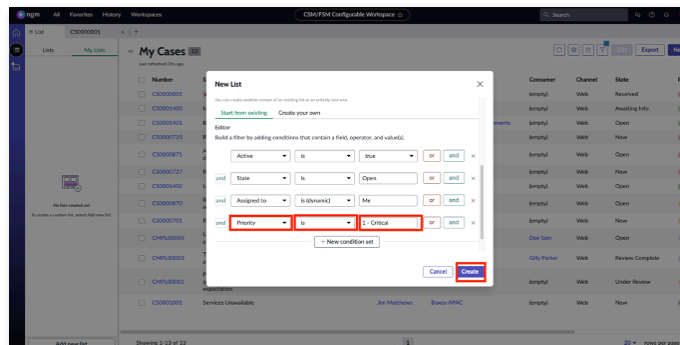




21. On the pop-up screen scroll down to the filter criteria and click on **AND** as shown on the screenshot below:



22. On the first input field select **Priority**, in the second input field select **is**, in the third input field select **1-Critical**. Click **Create**.



Here's how your list should look:

The screenshot displays a web application interface for 'My Open Critical Cases'. The table contains the following data:

Number	Short Description	Action Status	Contact	Account	Consumer	Channel	Status	Priority	Assigned to	Updated
CS000002	Website display on mobile device	Open	John Smith	Home	Simple	Web	Open	High	John Smith	2023-09
CS000001	Active Analytics performance degradation	Open	Simple	Simple	Simple	Web	Open	High	John Smith	2023-09

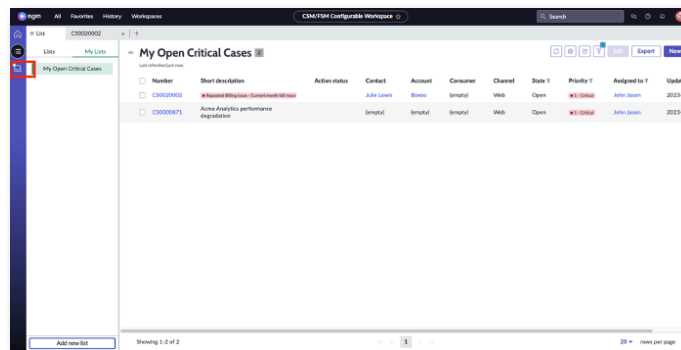
The interface includes a search bar at the top right, a left sidebar with 'My Open Critical Cases' selected, and a status bar at the bottom indicating 'Showing 1-2 of 2' and '20 items per page'.

Congratulations! You helped John to efficiently work on and prioritize his cases. Next chapter we will see how one of your customers will log a complaint using out of the box customer portal and then John addressing the complaint leveraging automation.

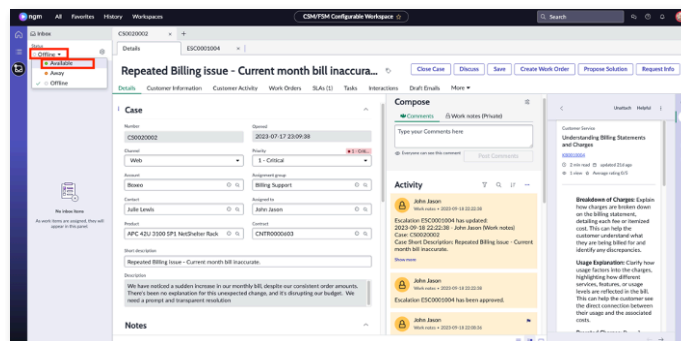
# Modifying agent availability

Before we move on to complaint management and portal, let's set John's status as Available so that when your customer Julie wants to connect to John via live chat, the chat gets routed to him.

1. Click on the inbox icon as shown below:



2. Click on Offline and choose Available from the list.



Great! With John's status now set to Available, we can move on to the next section!


# Complaint App Overview Demo

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## Overview

In this section, we see how an external stakeholder/user can log a complaint using the out of the box portal. Julie, the external user, will use the out of the box portal to log a complaint.

## Personas

Julie Lewis	External Stakeholder (Requester)
	As an external stakeholder, Julie's complaint should be handled with great care and attention. It's important to address her concerns promptly and effectively to maintain a positive relationship and reputation with her and others who may be observing how your company handles such matters.

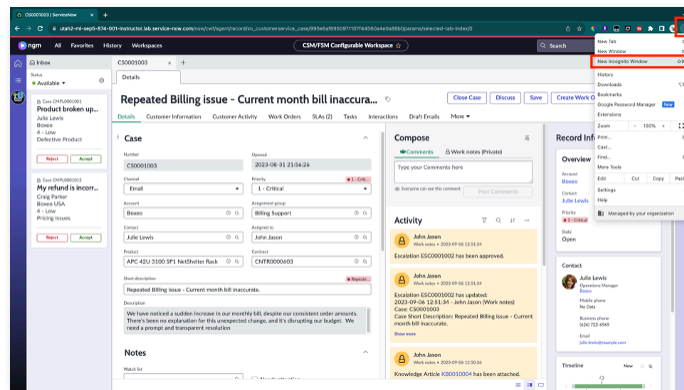
## Experience URL

For Julie's portion of the workshop, copy the URL below and paste into your browser replacing INSTANCENAME with your lab instance name. Your instance name is formatted similar to utah2-ml-sep20-985-001

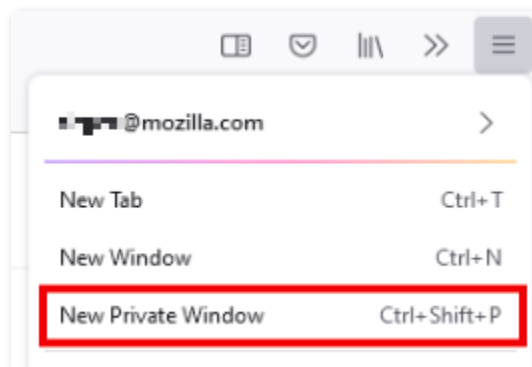
<https://INSTANCENAME.lab.service-now.com/csm>

# Customer Experience

1. For this exercise, we'll need to open a new browser session so that we can see both John and Julie's experiences.  
If you are using Chrome, open a New Incognito Window on your browser.

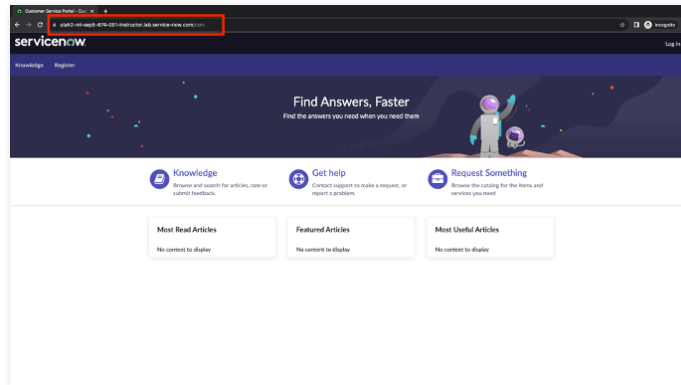


If you are using FireFox, open a New Private Window.



2. Now, on the incognito window paste the external portal URL that we just

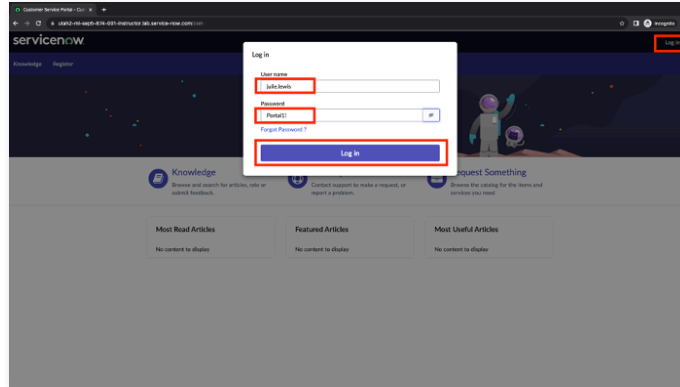
copied. Then hit Enter or Return key on your keyboard so that you can be directed to the portal.



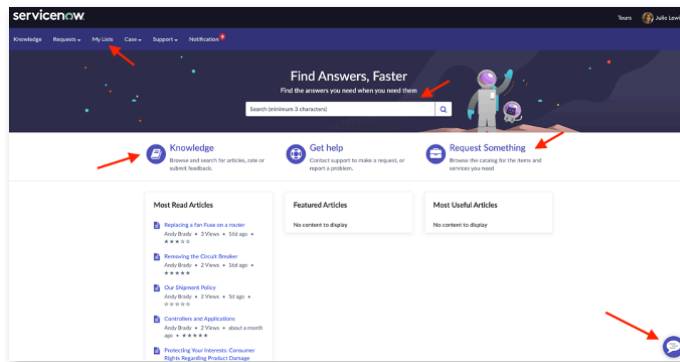
3. On the portal page, click Log in and enter:

Field Name	Password
User name	julie.lewis
Password	Portal1!

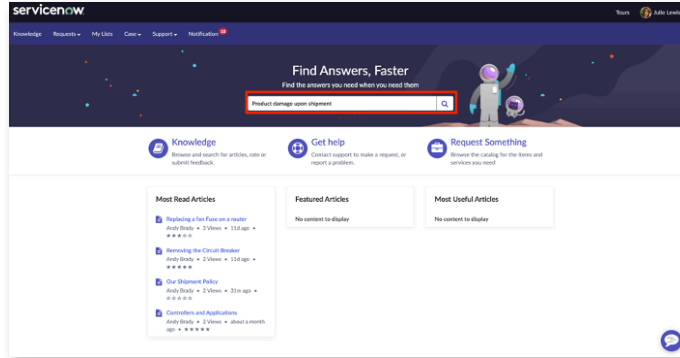
Click Log in



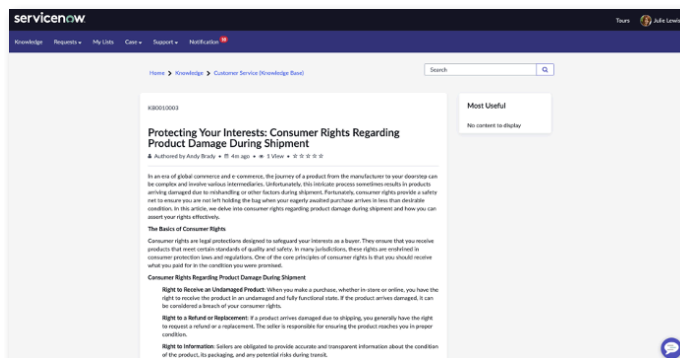
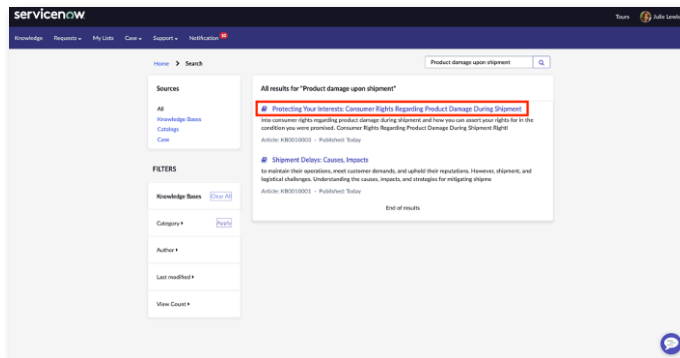
4. What you see on the screen is the out of the box portal. Your organization will change the look and feel, but the out of the box portal is already full of functionality with service catalogs, knowledge articles, virtual agents and chat bots etc.



5. Julie received a damaged product. First, she wants to see what her next steps could be to get support from your company. Go to the search bar as shown below and type Product damage upon shipment and press Return or Enter on your keyboard.

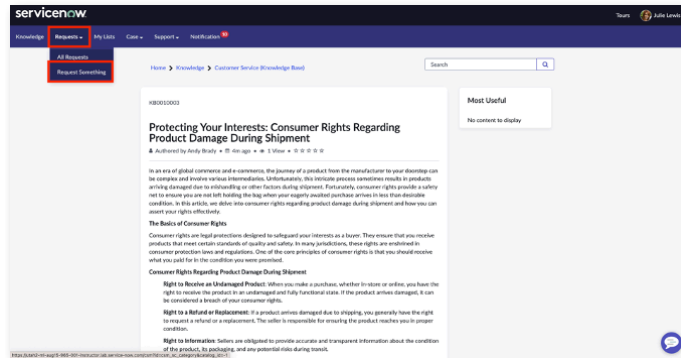


6. You can now see knowledge articles. Click on the first knowledge article to display.

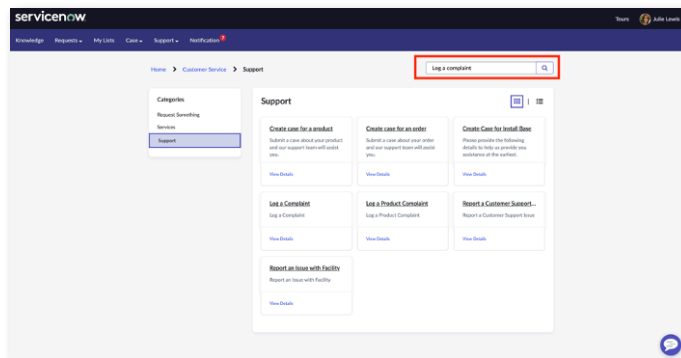


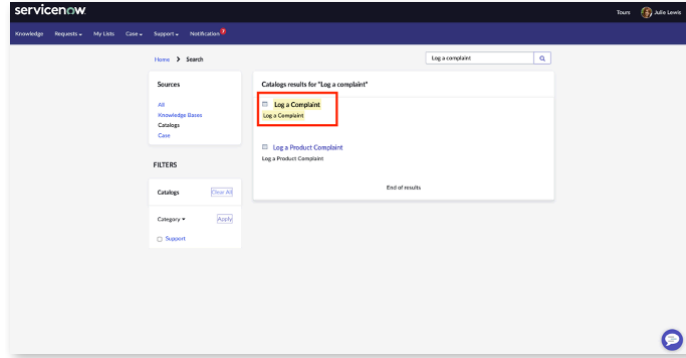


- Let's assume that Julie decides to log a complaint. Click on Requests and select Request Something.



- On the screen, search for Log a complaint as shown in the screenshot below



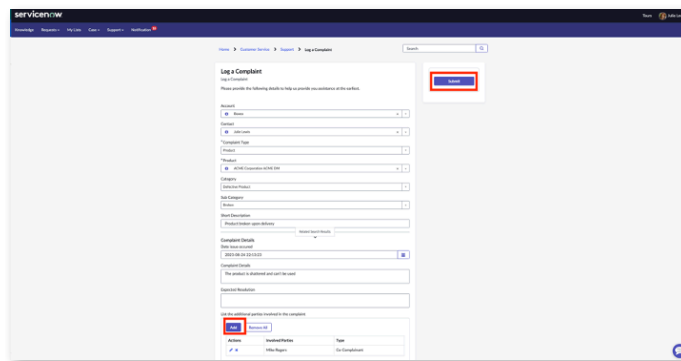


9. Fill in the form as followed:

Field Name	Value
Complaint Type	Product
Product	ACME Corporation ACME DM
Category	Defective Product
Sub Category	Broken
Short Description	Product broken upon delivery
Date issue occurred	Click on the calendar icon. Select today and click OK. You can also type in the answer instead of using the calendar widget
Complaint Details	The product is shattered and can't be used

Field Name	Value
List the additional parties involved in the complaint	Click on Add button. On the Involved Parties field, select Mike Rogers. On the Type field, select Co-Complainant

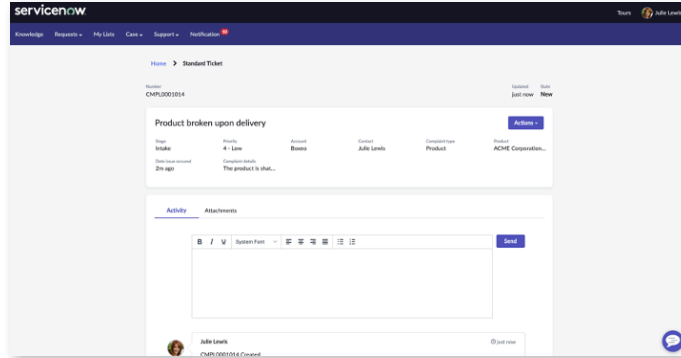
Click Submit



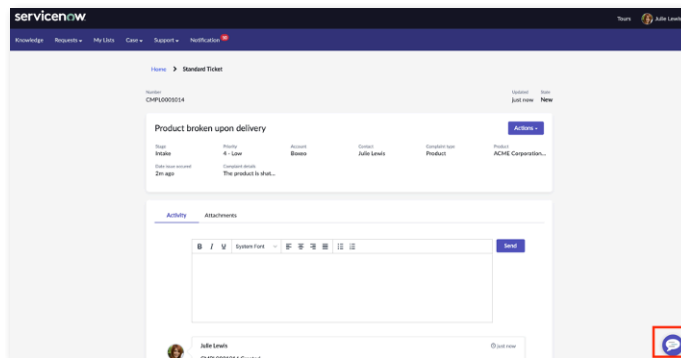
**i** NOTE

Note that once you type in the **Short Description**, the system automatically displays knowledge articles and related services. If you want to, you can disable this feature

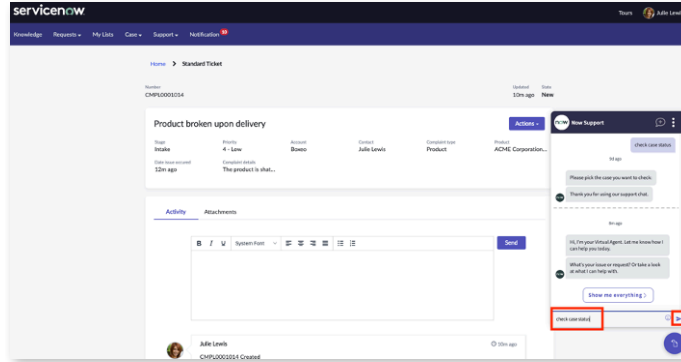
- See that Julie is presented with a complaint record that she can always come back to and track progress.



11. Julie can also interact with the Virtual Agent that is out of the box enhanced with AI capabilities and can be used to log requests, check case/complaint statuses, getting routed to a live agent for chat or more! Click on the **Virtual Agent** icon.



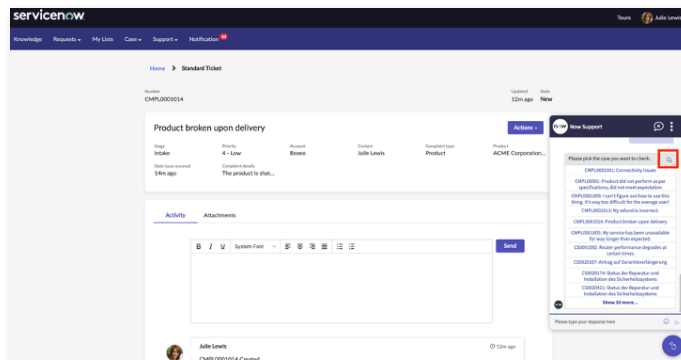
12. On the Virtual Agent, Julie can see her past conversations and start a new one. Type check case status



**NOTE**

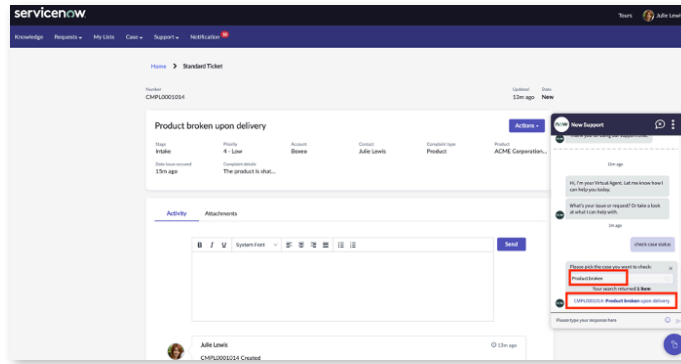
Instead of typing what you need, you can also click on **Show me everything** to see all the list of requests you can accomplish with the VA. In the instance you are using right now, we have a couple out of the box requests enabled.

- Virtual Agent presents all the cases and complaints that are being logged by Julie. Click on the magnifier icon to search for the complaint.

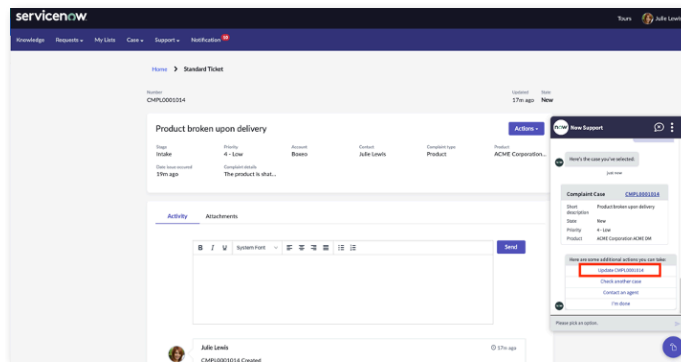


- Type Product broken on the search bar. You'll see that Virtual Agent returns

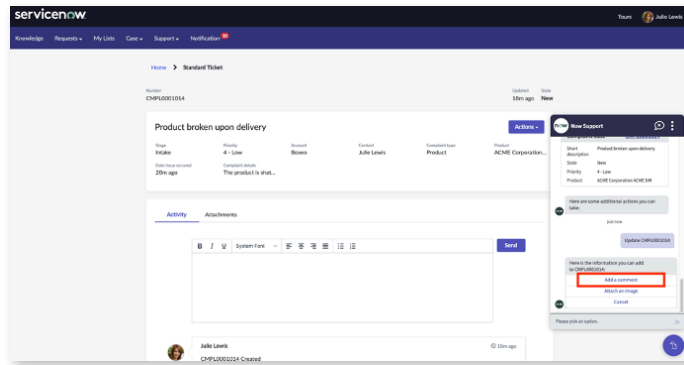
the complaint that you just logged. Select the complaint.



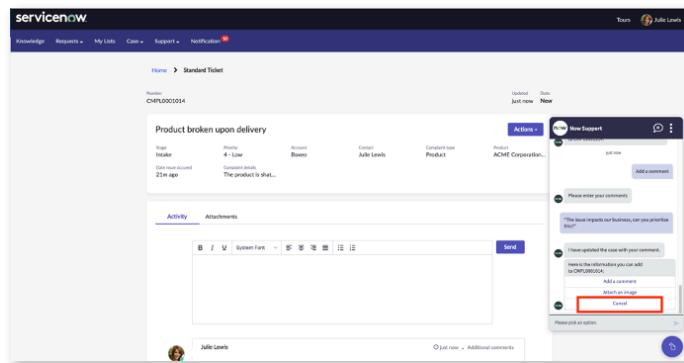
15. Select Update CMPL0001001 (the complaint number may be different). Julie can create and update their cases, requests, and complaints without any effort from the support team!



16. Select Add a comment and type The issue impacts our business, can you prioritize this?



17. Now you added a comment to the complaint. Select **Cancel** in the new Virtual Agent question as you don't want to do any other updates.

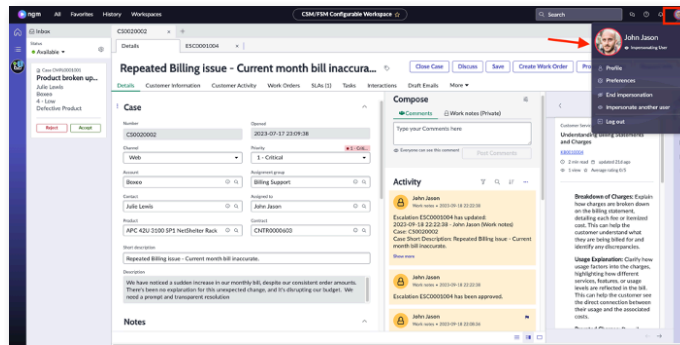


Congratulations! Your customer was able to submit a complaint so easily. All this with out of the box features, including the Virtual Agent! We will now go back to John and start working on this complaint.

# Customer Service Agent Experience

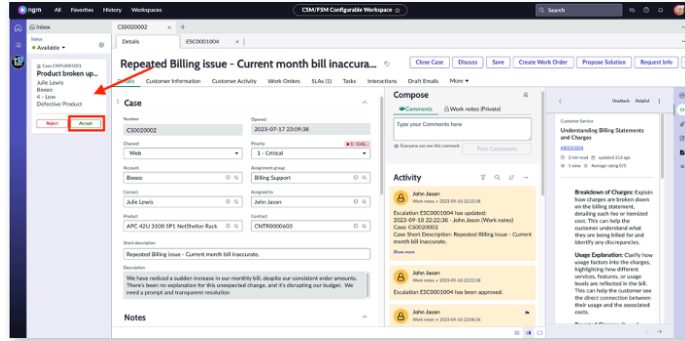
In this section, we see how an agent works on a complaint in an efficient way using out of the box workflow automation. Note that in the following App Engine session we will see how you can modify this workflow to fit your needs with no-code tools.

1. Go back to the window where you have logged in as John. Let's first make sure that you are still impersonated as John Jason. Go to the profile picture on the right-hand side. It should show John Jason.



2. Go to Inbox and see that the complaint request got routed to John Jason. Click Accept.

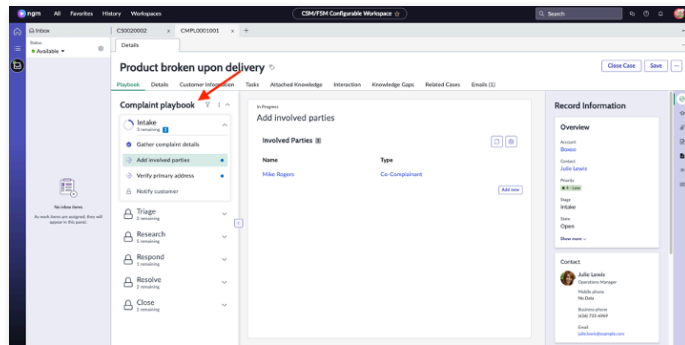




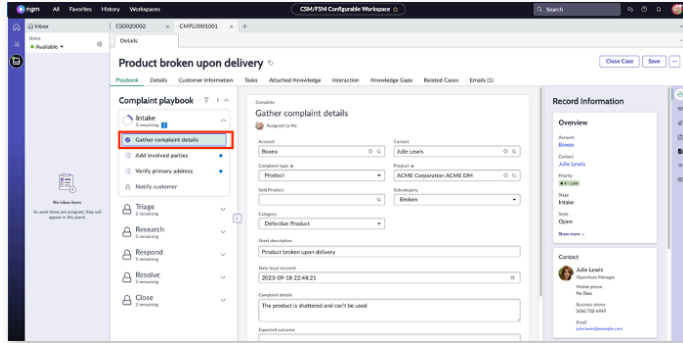
- On the complaint record, you'll see the Complaint playbook which is the out of the box complaint process. We will go through this process together.

**NOTE**

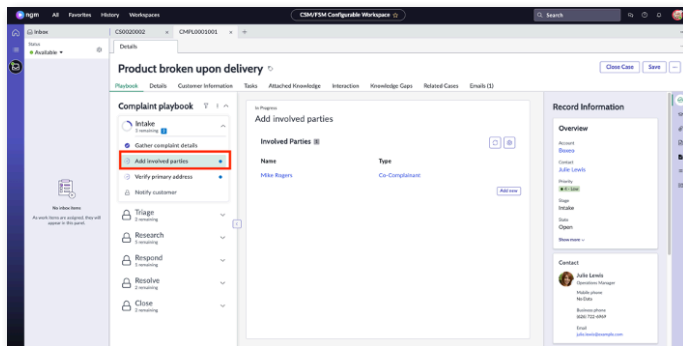
If Special Handling notes pop up, simply click on the X to close the box.



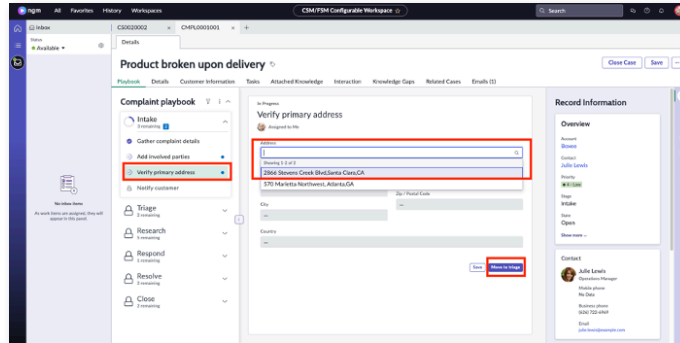
- Click on Gather complaint details to see the information captured by Julie.



5. Click on **Add involved parties** to see the co-complainant that Julie already added. See that John can add more here if there is need. For now, we will leave this as is.



6. Click on **Verify primary address** and click on the Address field to select the first address that pops up. Once the address is populated, click on **Move to Triage**.

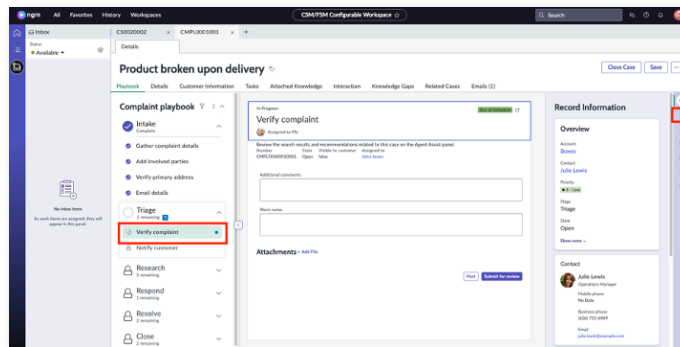


### ! INFO

It may take a second for the complaint to move to next stage

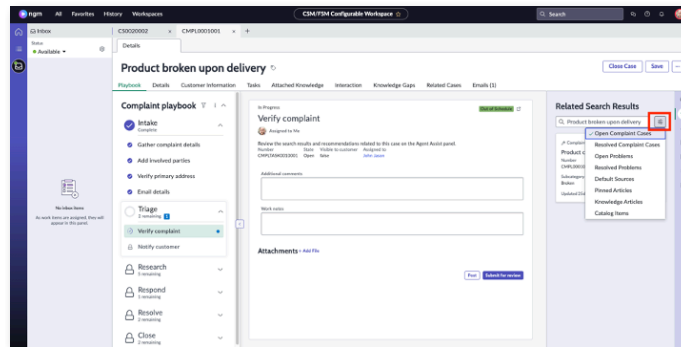
Note that the Intake section is now completed, and Complaint is automatically moved to Triage stage. There has also been an automated email sent to Julie.

7. Click on Verify complaint. John wants to see if this is a legitimate complaint or not. First, he will check if there is already a similar open complaint to prevent duplicate effort. Click on the hat icon on the right. We call this Agent Assist.

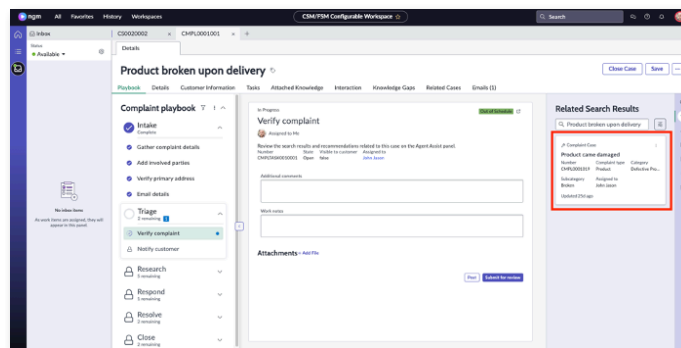


8. On the Agent Assist panel see that you can filter for open complaint cases,

resolved complaint cases, knowledge articles etc.



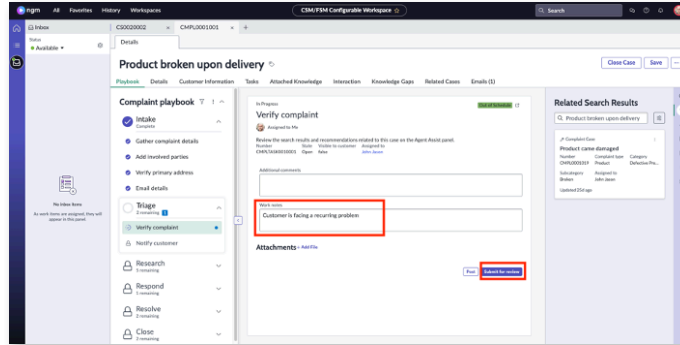
9. Stay on Open Complaint Cases and observe that there is a similar problem occurring for the same customer. So, this is a persisting issue.



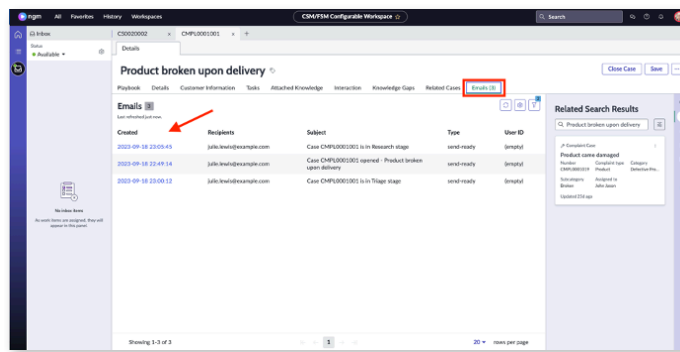
**i** NOTE

You can click on the complaint case to see more details. For now, we will leave this as is and move on.

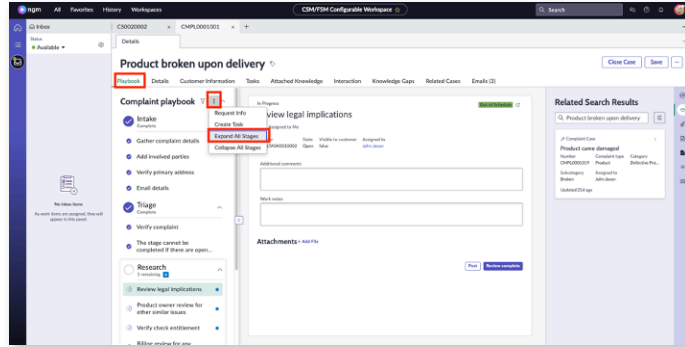
10. On the Verify complaint, on the Work notes section enter Customer is facing a recurring problem and click on Submit for review.



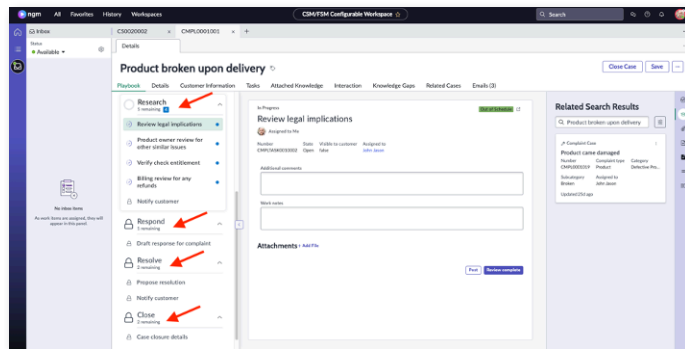
- Observe that the triage stage is automatically completed, and complaint is moved to research stage. Now, click on the Emails tab as shown below to see all the automated emails sent to Julie.



- Click on Playbook tab. Observe the new tasks that are assigned within the research phase. Click on the three-dot icon and then select Expand All Stages as shown below:

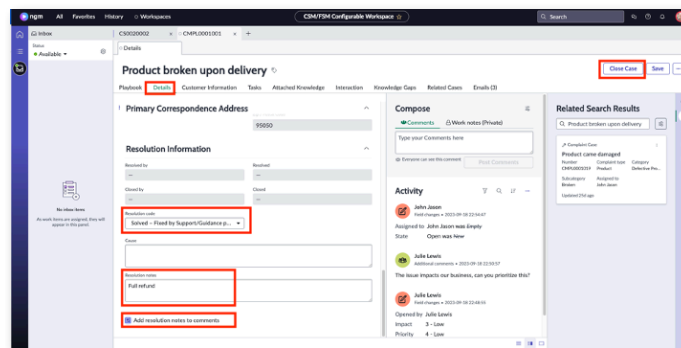


13. These are all the remaining out of the box tasks and steps that your team can take to resolve complaints. For this lab, we will stop following the steps here and close this complaint.



14. Click on Details tab. Scroll down to the Resolution Information section. Fill in these 3 fields:

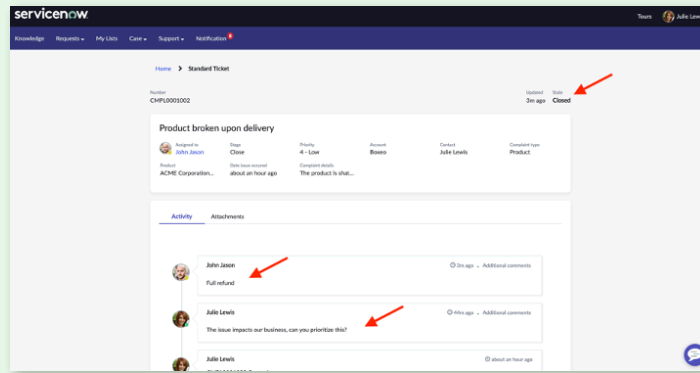
Field Name	Value
Resolution Code	Solved – Fixed by Support/Guidance provided
Resolution Notes	Full refund
Add resolution notes to comments	CHECK THE BOX



Click on Close Case

 TIP

If you go back to the incognito window where you had the external portal open, you can see the updates that Julie can see immediately, such as the case status or comments added by herself or John.




Congratulations! John was able to work on the complaint and follow the right steps thanks to out of the box processes.



# Reporting

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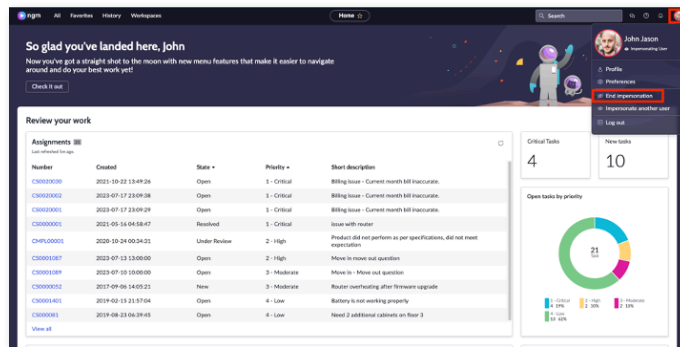
## Personas

Fred Luddy	Manager
	<p>Fred is responsible for overseeing and leading a team of customer service representatives and ensuring the delivery of excellent customer support. His primary role is to manage and optimize customer service operations to meet or exceed customer expectations.</p>

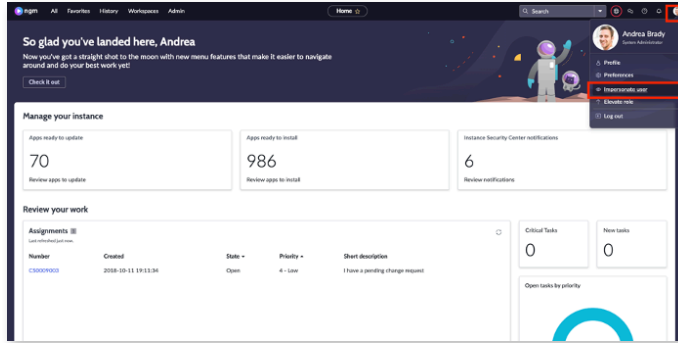
# Streamlined Insights - Enhancing Service Manager Data Reporting

In this section, we see how a manager can leverage reporting in ServiceNow to keep track of his company's and team's performance.

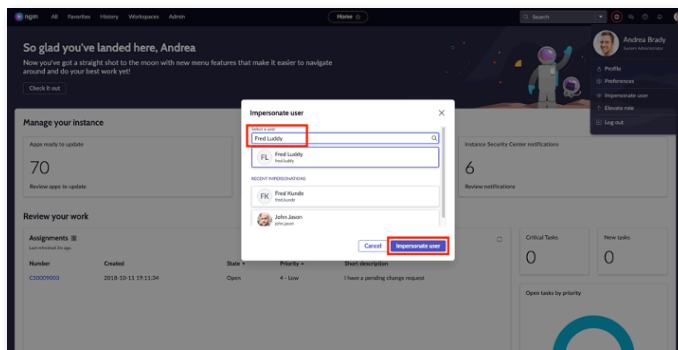
1. Let's get started! First, we need to pick the right user. Click the user profile picture, if you are still impersonated as John Jason, select End impersonation.



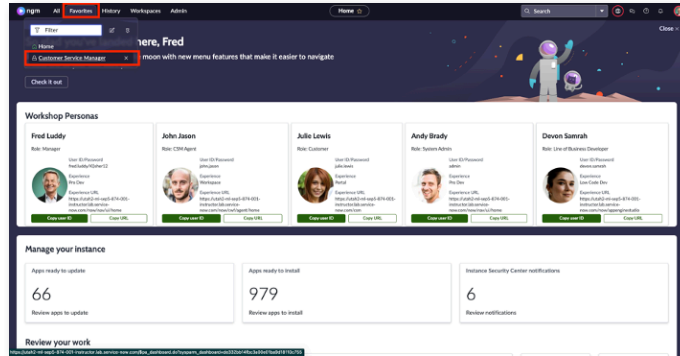
2. Click the user profile picture, select Impersonate User.



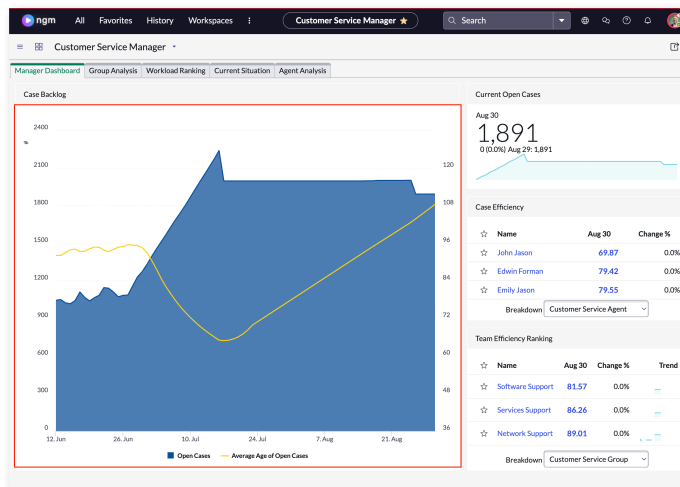
3. Search for Fred Luddy and click Impersonate User.



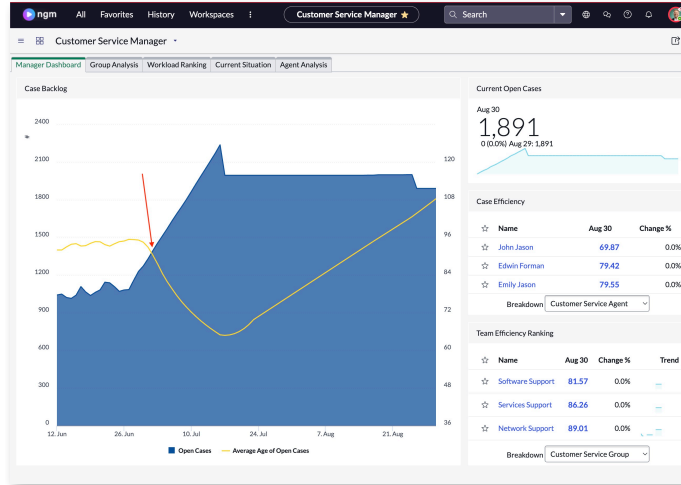
4. Click on Favorites and then click on Customer Service Manager dashboard



5. What you see on your screen is a sample service manager dashboard. CSM OOB provides you template dashboards that you can edit based on your needs. Observe that on the highlighted graph below, the number of open cases is increasing but the average age of open cases is decreasing.



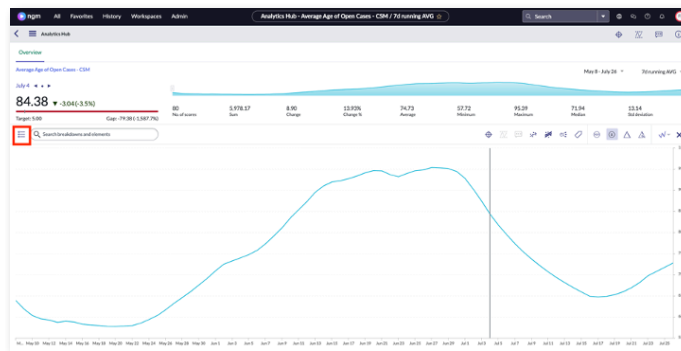
6. Let's understand this trend. You can click anywhere on the lines to drill down into the data. For this lab purpose, click on the yellow line where it intersects with the blue line.



**i** NOTE

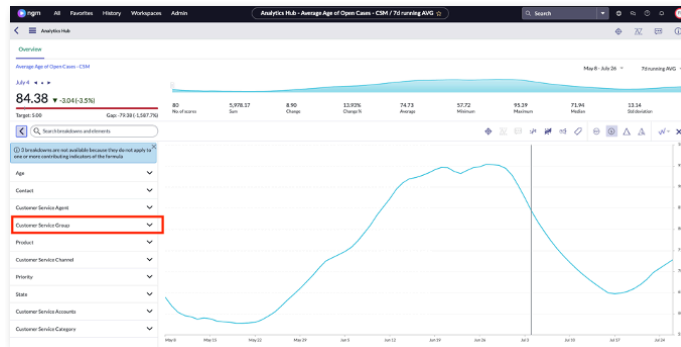
It's ok if you click somewhere else, you'll still be able to follow along

7. We will now discover the breakdown of this trend to understand what products, customers, channels etc. is contributing to it. Click on the list icon as shown below

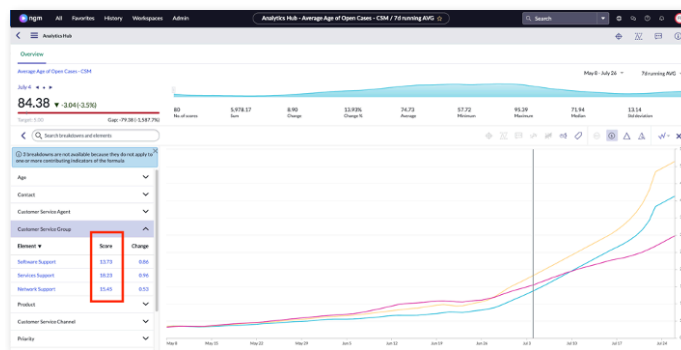


8. Observe that you have multiple variables that you can drill down to. Let's first

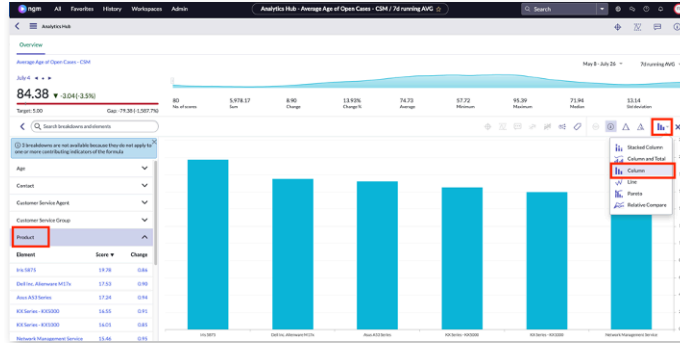
click on Customer Service Group



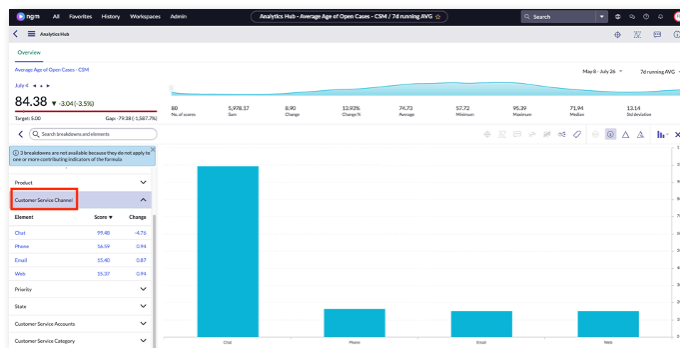
9. We can now see that within the Customer Service Group, Software Support has been the fastest and Services Support the slowest.



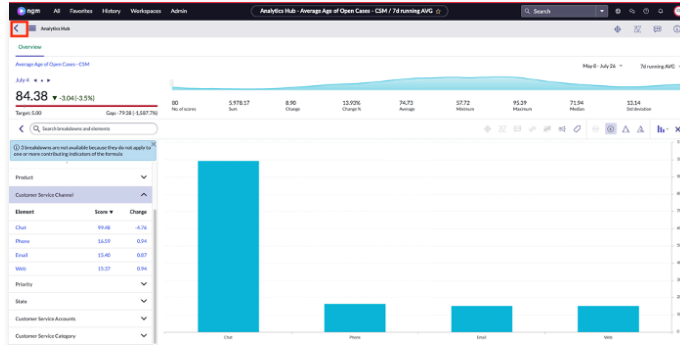
10. Let's now see which products have been impacted by this trend. Click on Product. Then click on the line graph icon to change the view to columns. We can see that cases related to Iris 5875 have been taking the longest.



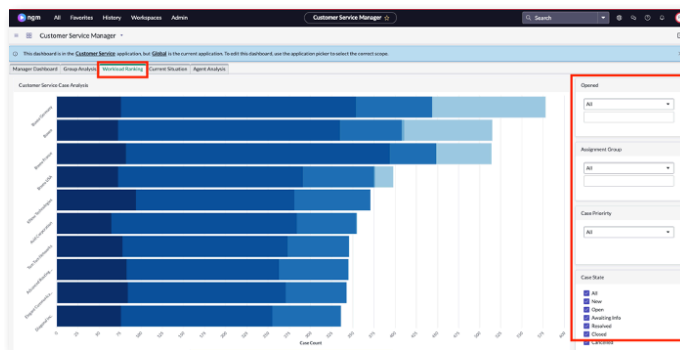
- Let's now see which channels contribute to this trend. Click on Customer Service Channel. Observe that cases that come in via chat has been taking the longest to resolve.



- Now Fred has a better idea on what is contributing to the case resolution time. Let's now click on the back icon to go back to the dashboard.

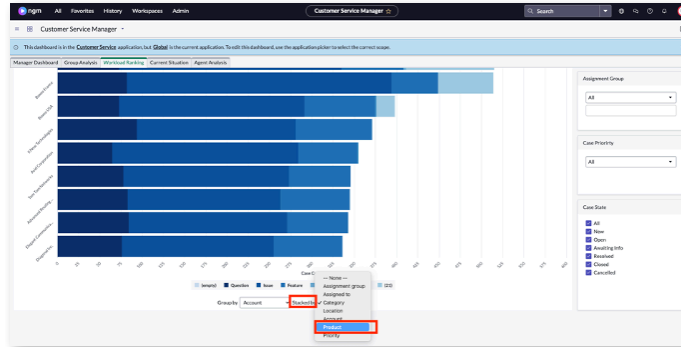


- Click on **Workload Ranking**. Observe that you now have case analysis per customer and interactive filters to drill further in data.

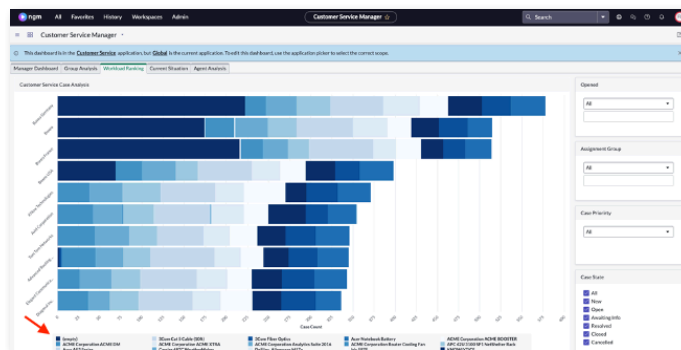


- Scroll down and select **Stacked by Product**.

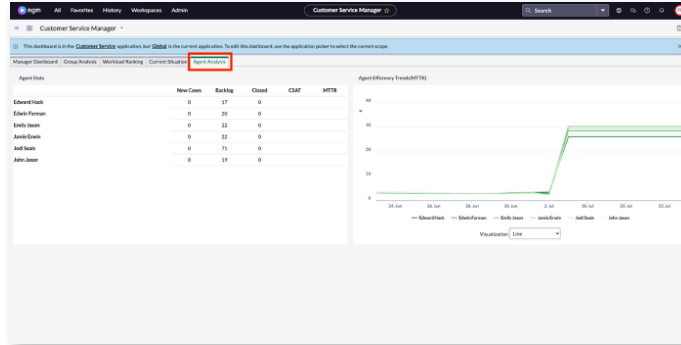




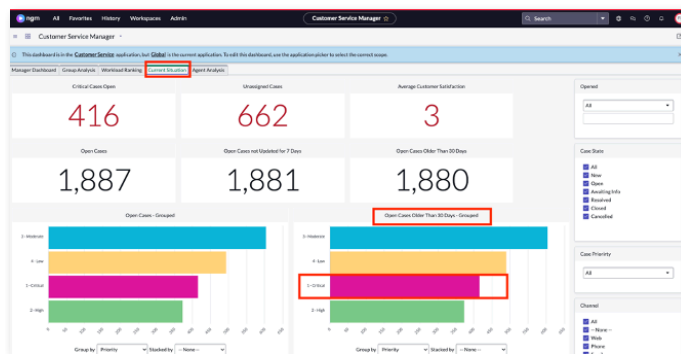
- Observe that you can now understand which products are resulting in most cases per customer.



- Let's see another tab. Click on Agent Analysis. You can now see the agent stats and agent efficiency. Remember that all this is real time data!



- Finally, click on **Current Situation**. We can see that there are open cases older than 30 days. On the **Open Cases Older than 30 Days** bar chart, click on **1-Critical**.



- You can now see the detailed list of all the critical cases that are older than 30 days. Let's add a work note to these cases to get the agents' attention. Of course, we won't be doing this one by one! First, click on the check box as shown below:

Number	Short description	State	Action status	Contact	Account	Assignee	Assignment group	Priority	Channel	Opened	Updated
<input type="checkbox"/>	C8002002 Billing issue - Current month bill inaccurate.	Open		George Warren	Boomi	John Jaxon	Billing Support	1 - Critical	Web	2023-07-17 16:09:36	2023-09-18 15:49:23
<input type="checkbox"/>	C8002003 Change SAP 020-4000 - SAP 020 creation Analytics Suite 2023	Awaiting info	Needs attention	John Lewis	Boomi	Erin Hunt	Network Support	1 - Critical	Web	2023-07-05 09:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002004 Site Design Problem needs to be updated.	Awaiting info		Impranj	Impranj	Impranj	Impranj	1 - Critical	Phone	2023-07-05 15:00:30	2023-07-17 16:09:36
<input type="checkbox"/>	C8002005 Email server is down.	Resolved		Impranj	Impranj	Impranj	Impranj	1 - Critical	Web	2023-07-05 22:06:46	2023-07-17 16:09:36
<input type="checkbox"/>	C8002006 Current Analytics for company portal app	Resolved		Impranj	Impranj	Impranj	Impranj	1 - Critical	Email	2023-07-05 20:40:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002007 Issue with Fax machine	Awaiting info		Impranj	Impranj	Impranj	Impranj	1 - Critical	Phone	2023-07-05 20:00:34	2023-07-17 16:09:36
<input type="checkbox"/>	C8002008 Current Analytics for company portal app	Open		Impranj	Impranj	Impranj	Impranj	1 - Critical	Phone	2023-07-05 20:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002009 Billing issue - Current month bill inaccurate.	Open		John Lewis	Boomi	John Jaxon	Billing Support	1 - Critical	Web	2023-07-17 16:09:29	2023-07-17 16:09:42
<input type="checkbox"/>	C8002010 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-06 17:28:04	2023-07-17 16:09:36
<input type="checkbox"/>	C8002011 Email server is down.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-05 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002012 Email server is down.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-05 15:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002013 My computer is not allowing the headset/phone device	New		Impranj	Impranj	Both Anglin	Network Support	1 - Critical	Email	2023-07-11 19:36:48	2023-07-17 16:09:36
<input type="checkbox"/>	C8002014 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-06 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002015 Request Main Password reset	New		Impranj	Impranj	Both Anglin	Network Support	1 - Critical	Web	2023-07-07 09:20:00	2023-07-17 16:09:36
<input type="checkbox"/>	C8002016 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-06 06:30:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002017 Request installation inception	New		Carl Customer	Boomi	Both Anglin	Impranj	1 - Critical	Phone	2023-07-17 09:00:34	2023-07-17 16:09:36
<input type="checkbox"/>	C8002018 Issue with Fax machine	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-07 16:24:45	2023-07-17 16:09:36
<input type="checkbox"/>	C8002019 Issue with Canon Service	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-11 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002020 Issue with Fax machine	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-07 09:40:39	2023-07-17 16:09:36
<input type="checkbox"/>	C8002021 Need access to the common drive.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-07 03:00:01	2023-07-17 16:09:36

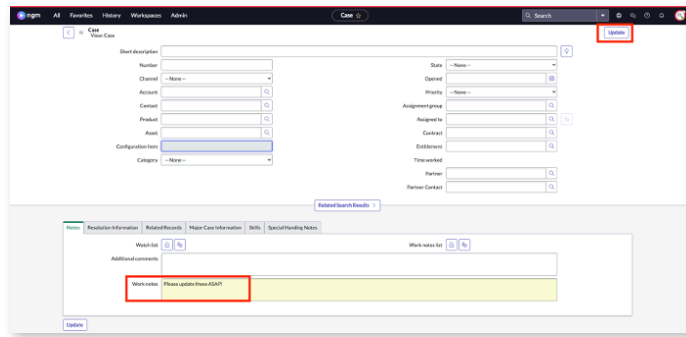


TIP  
You could also select cases individually by clicking on the checkboxes beside the case numbers

19. Right click beside the Number column and click on Update Selected

Number	Short description	State	Action status	Contact	Account	Assignee	Assignment group	Priority	Channel	Opened	Updated
<input type="checkbox"/>	C8002002 Billing issue - Current month bill inaccurate.	Open		George Warren	Boomi	John Jaxon	Billing Support	1 - Critical	Web	2023-07-17 16:09:36	2023-09-18 15:49:23
<input type="checkbox"/>	C8002003 Change SAP 020-4000 - SAP 020 creation Analytics Suite 2023	Awaiting info	Needs attention	John Lewis	Boomi	Erin Hunt	Network Support	1 - Critical	Phone	2023-07-05 09:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002004 Site Design Problem needs to be updated.	Awaiting info		Impranj	Impranj	Impranj	Impranj	1 - Critical	Web	2023-07-05 15:00:30	2023-07-17 16:09:36
<input type="checkbox"/>	C8002005 Email server is down.	Resolved		Impranj	Impranj	Impranj	Impranj	1 - Critical	Web	2023-07-05 22:06:46	2023-07-17 16:09:36
<input type="checkbox"/>	C8002006 Current Analytics for company portal app	Resolved		Impranj	Impranj	Impranj	Impranj	1 - Critical	Email	2023-07-05 20:40:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002007 Issue with Fax machine	Awaiting info		Impranj	Impranj	Impranj	Impranj	1 - Critical	Phone	2023-07-05 20:00:34	2023-07-17 16:09:36
<input type="checkbox"/>	C8002008 Current Analytics for company portal app	Open		Impranj	Impranj	Impranj	Impranj	1 - Critical	Phone	2023-07-05 20:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002009 Billing issue - Current month bill inaccurate.	Open		John Lewis	Boomi	John Jaxon	Billing Support	1 - Critical	Web	2023-07-17 16:09:29	2023-07-17 16:09:42
<input type="checkbox"/>	C8002010 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-06 17:28:04	2023-07-17 16:09:36
<input type="checkbox"/>	C8002011 Email server is down.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-05 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002012 Email server is down.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-05 15:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002013 My computer is not allowing the headset/phone device	New		Impranj	Impranj	Both Anglin	Network Support	1 - Critical	Email	2023-07-11 19:36:48	2023-07-17 16:09:36
<input type="checkbox"/>	C8002014 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-06 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002015 Request Main Password reset	New		Impranj	Impranj	Both Anglin	Network Support	1 - Critical	Web	2023-07-07 09:20:00	2023-07-17 16:09:36
<input type="checkbox"/>	C8002016 Update access to systems requested	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-06 06:30:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002017 Request installation inception	New		Carl Customer	Boomi	Both Anglin	Impranj	1 - Critical	Phone	2023-07-17 09:00:34	2023-07-17 16:09:36
<input type="checkbox"/>	C8002018 Issue with Fax machine	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Phone	2023-07-07 16:24:45	2023-07-17 16:09:36
<input type="checkbox"/>	C8002019 Issue with Canon Service	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-11 16:00:01	2023-07-17 16:09:36
<input type="checkbox"/>	C8002020 Issue with Fax machine	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Email	2023-07-07 09:40:39	2023-07-17 16:09:36
<input type="checkbox"/>	C8002021 Need access to the common drive.	New		Impranj	Impranj	Both Anglin	Impranj	1 - Critical	Web	2023-07-07 03:00:01	2023-07-17 16:09:36

20. On the form type: Please update these ASAP! to the Work Notes field and click Update.



Congratulations! Fred was able to understand service trends, get a handle of current state and agent efficiency. Finally, act on critical cases with a single button!


# Scale Digital Innovation with no-code Configuration

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## Overview

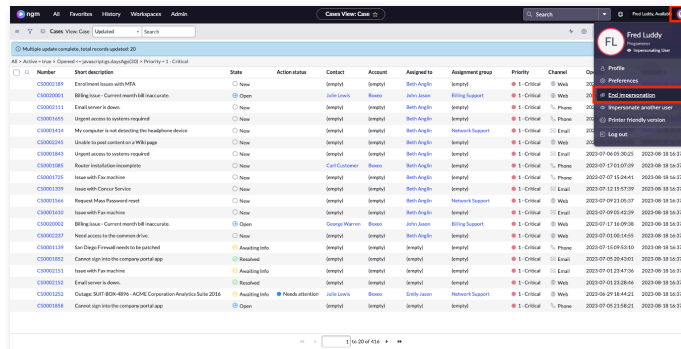
In this section, we will see how a business analyst, Andy, can configure the tool to include new automated process to the out of the box complaint management so that he can satisfy an urgent business need: complaint investigations

## Personas

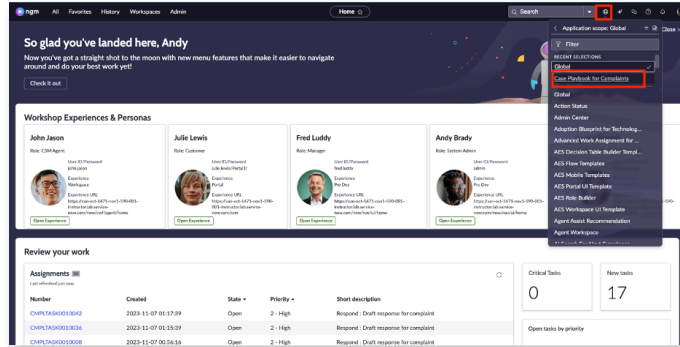
Andy Brady	System Administrator
	As a ServiceNow System Administrator, Andy's primary responsibilities involve managing and maintaining the ServiceNow platform within an organization.

# Create meaningful experiences for your application users

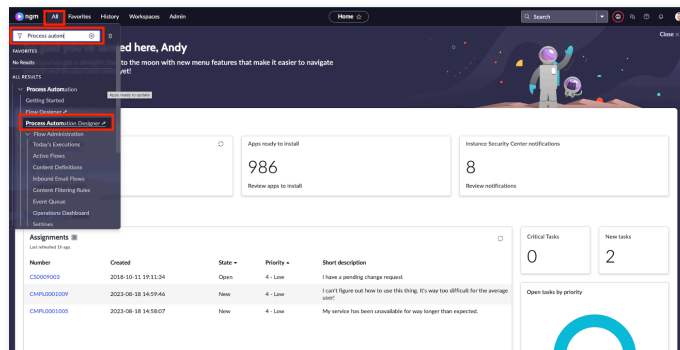
1. First, we need to pick the right user. Click the user profile picture and select End impersonation this will take us to admin view where Andy can make his changes.



2. Now let's go to the right scope to before we start updating the playbook. Go to the Scope icon at the top right corner and select Case Playbook for Complaints



- Now let's update the process. Go to All and type Process automation. Select Process Automation Designer.



- Click on Complaint Playbook that has "Published" status.

Label	Application	Status	Active	Updated by	Updated
Completed playbook	Case Playbook for Complaints	Draft	true	admin	2022-10-12 22:17:15
Completed playbook	Case Playbook for Complaints	Published	true	admin	2022-12-02 08:46:58
Connectivity Troubleshooter	Customer Service	Published	true	admin	2020-08-22 14:26:28

**! INFO**

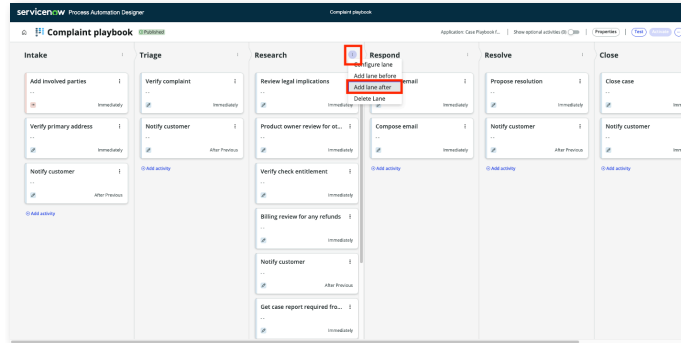
In real life you would use the one in Draft status to try and test changes before publishing

- Observe the lanes and tasks that were previously presented in the complaint case. This is the out of the box process that we will edit to include the investigation.

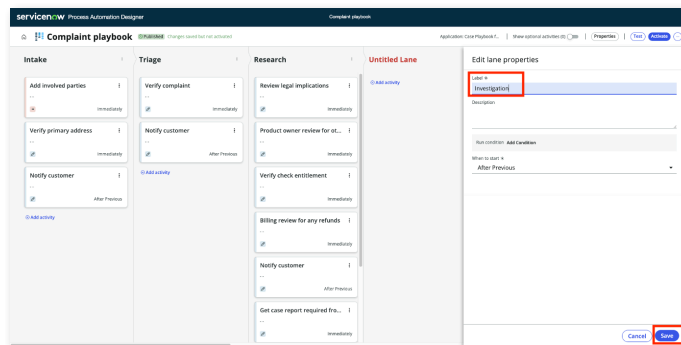
Intake	Triage	Research	Respond	Resolve	Close
Add involved parties	Verify complaint	Review legal implications	Compose email	Propose resolution	Close case
Verify primary address	Notify customer	Product owner review for et...	Compose email	Notify customer	Notify customer
Notify customer		Verify check endorsement			
		Billing review for any refunds			
		Notify customer			
		Get Case report required fro...			

- Click on the three-dot icon beside Research and select Add lane after.

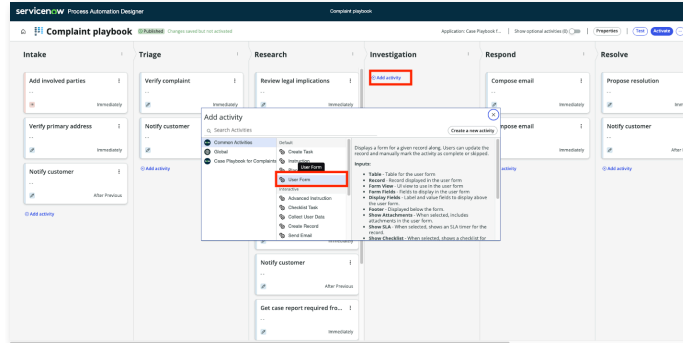




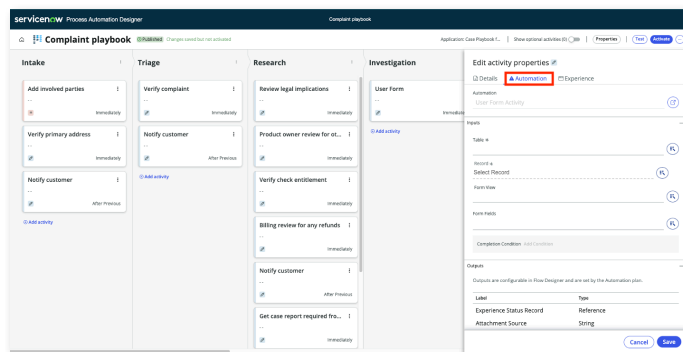
7. Type Investigation under Label and click Save.



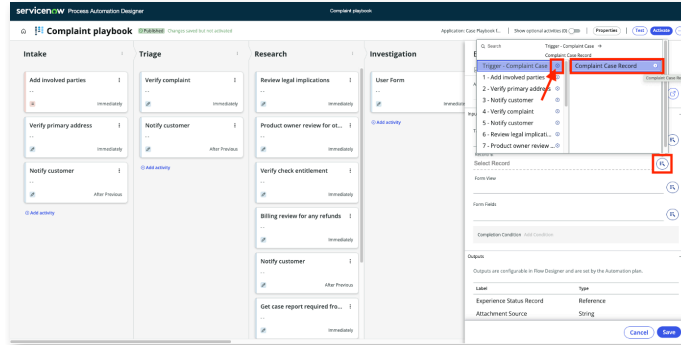
8. Under Investigation Lane, click on Add activity. Select User Form.



9. Click on the Automation tab



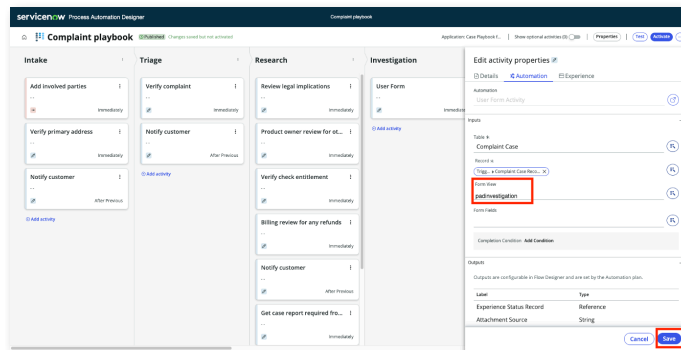
10. Click on the data pill icon beside Record. Then click on the arrow beside Trigger Complaint Case. Select Complaint Case Record



### ! INFO

This allows the process dynamically pull data from the current complaint record that the user is on

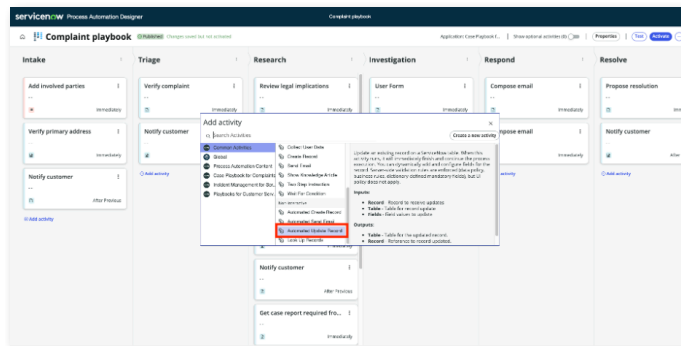
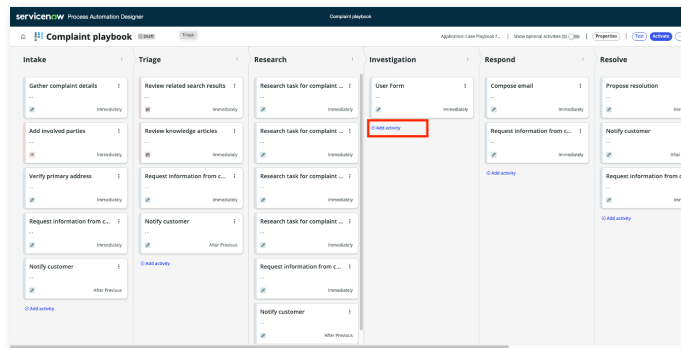
11. Type `padinvestigation` to the Form View field. Click Save



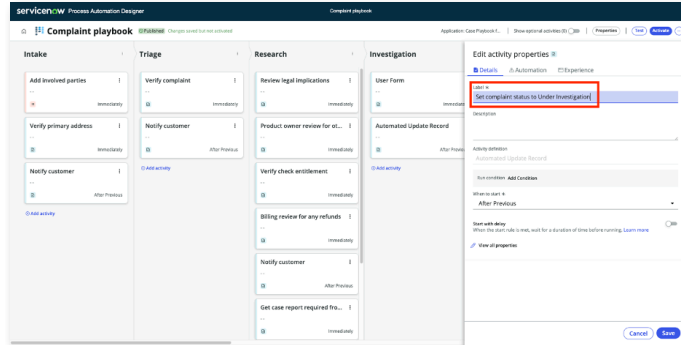
### ! INFO

Making this change allows the user to see the investigation required field at the right step of the overall process. `padinvestigation` is a form view that we have in this instance. The form view may be named differently.

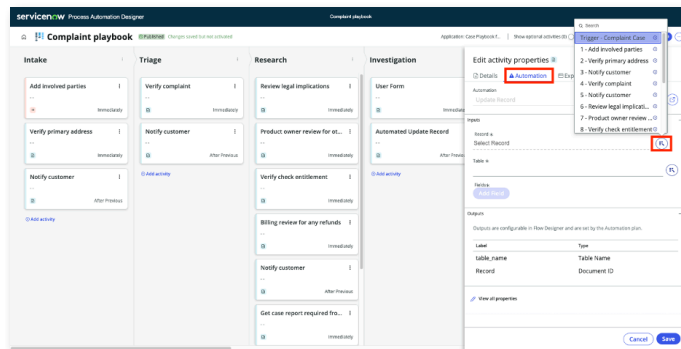
12. Now we will update the complaint status to Under Investigation when the user sets the Investigation Needed checkbox to True Click on Add activity under Investigation Lane. Then select Automated Update Record



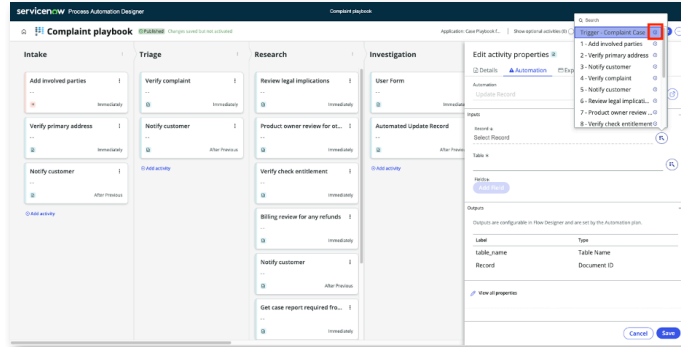
13. Type Set complaint status to Under Investigation to the Label field



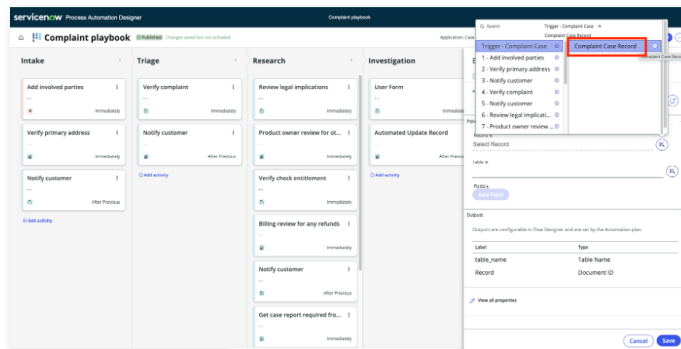
14. Click on Automation and click on the data pill icon beside the Record field



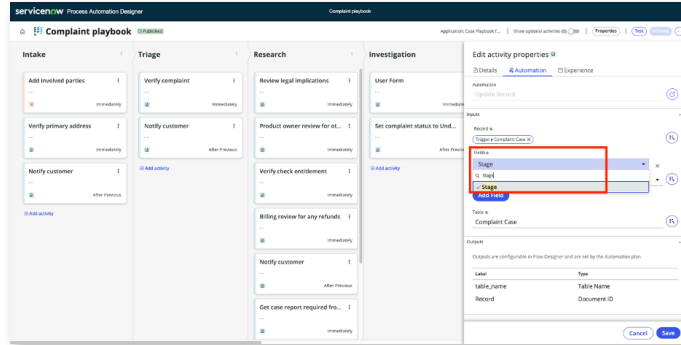
15. Click on the little arrow as shown on the screenshot



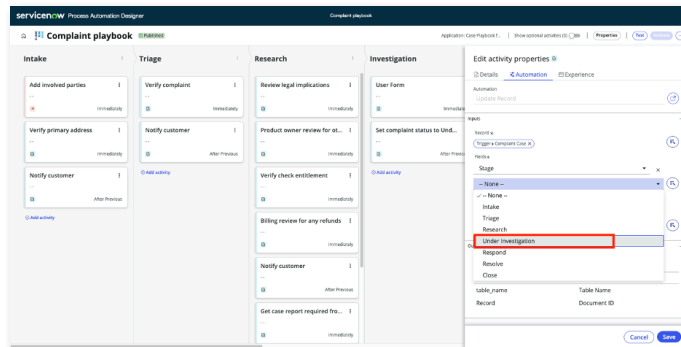
## 16. Select Complaint Case Record



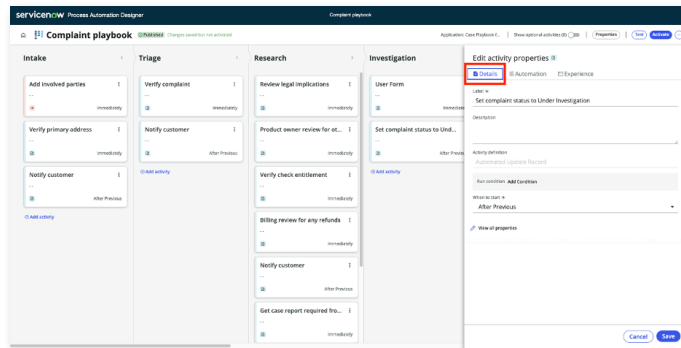
## 17. Click on the Fields and search for Stage and select Stage



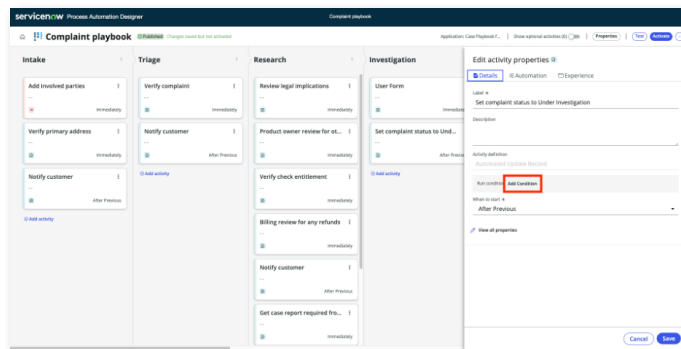
18. Select Under Investigation on the box that appears under Stage



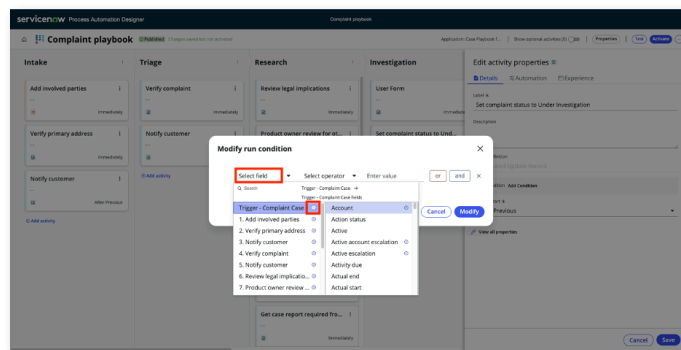
19. Now we will add a Run Condition to this step so that it only updates the complaint status if the Required Investigation is checked. Click on Details tab.



20. Click on Add Condition

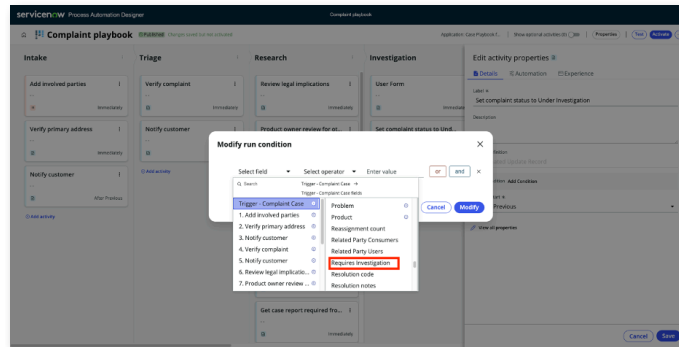


21. Click on the first field and click on the little arrow beside the Complaint Case

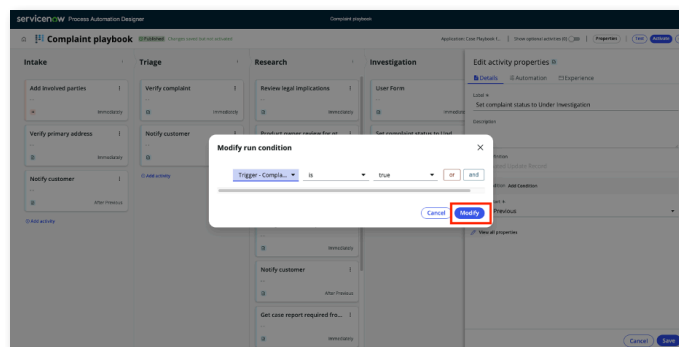




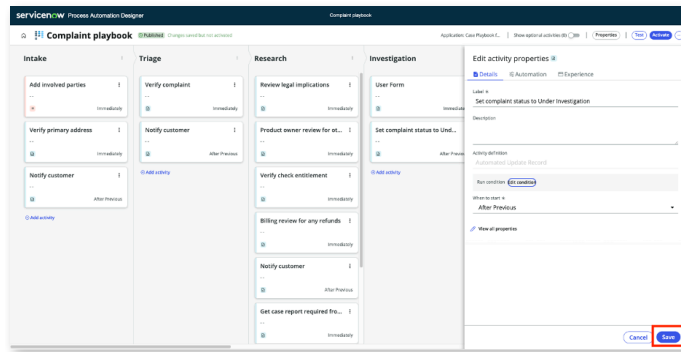
22. Scroll down on the fields section and then select Requires Investigation



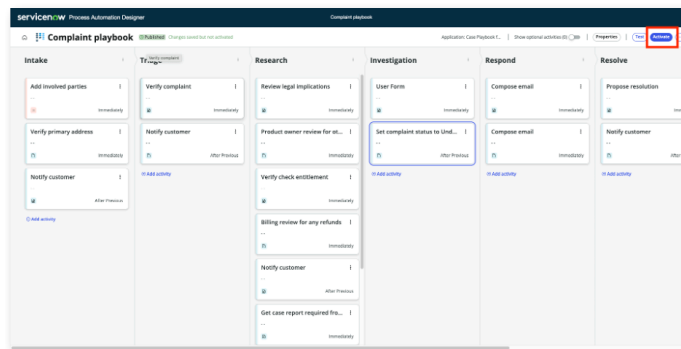
23. The system will auto populate the rest of the fields as shown below. Leave those as is and click on Modify



24. Click Save.



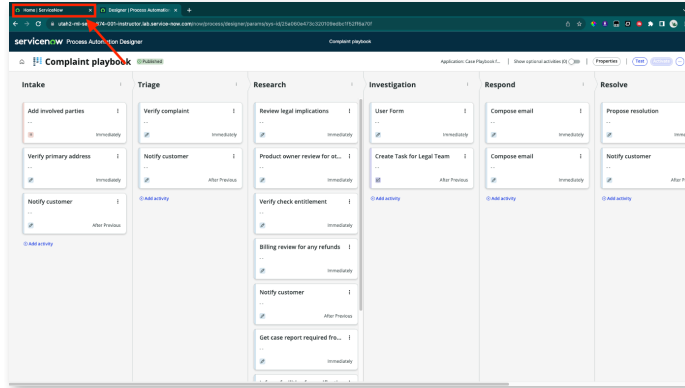
25. Finally click on **Activate**. This will activate the new process. It'll be applied to new complaints created going forward.



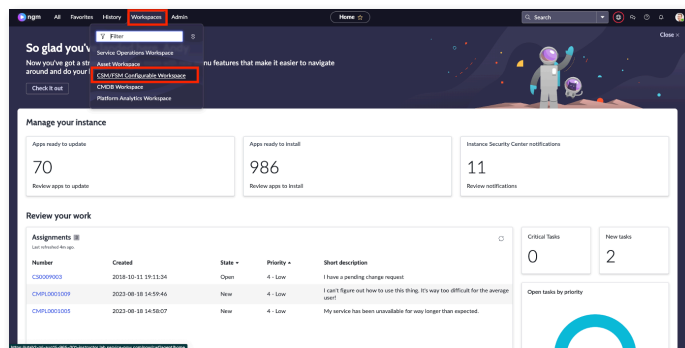
Great job! You updated the process so that the agents can now flag records for investigation and loop in the Legal Support team. Now let's see this on action! To see the new complaint process, we will create a new complaint record.

# Test the Complaints Playbook

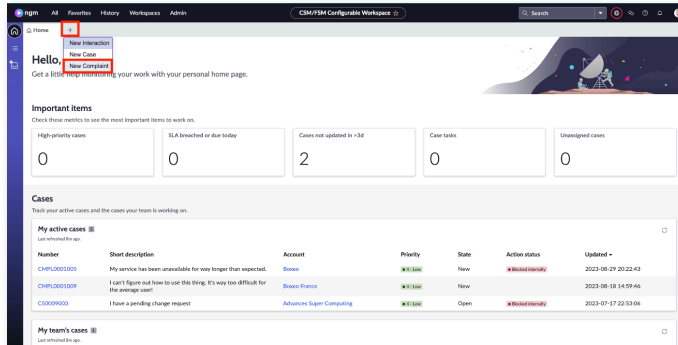
1. On your browser, click on the tab that says Home|ServiceNow



2. Click on Workspaces and select CSM/FSM Configurable Workspace



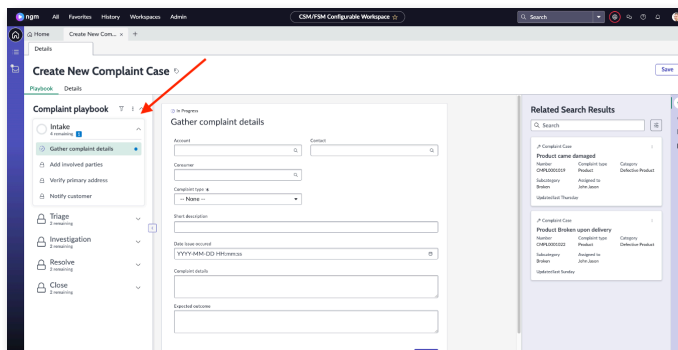
3. Click on + icon and then select New Complaint



**! INFO**

This is one of the ways your agents can create new records when they need to intake an issue.

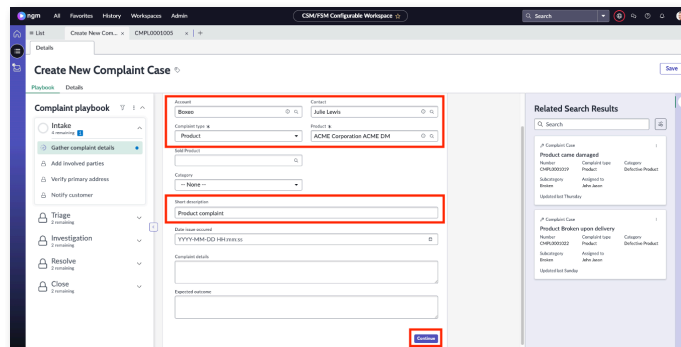
4. You'll see this screen:



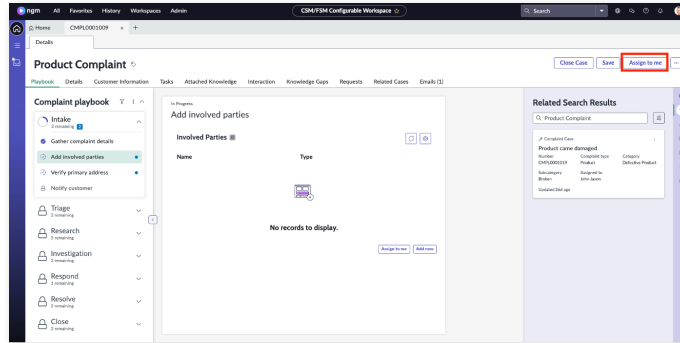
5. Fill in the details:

Field Label	Value
Account	Boxeo
Contact	Julie Lewis
Complaint Type	Product
Product	ACME Corporation ACME DM
Short Description	Product Complaint

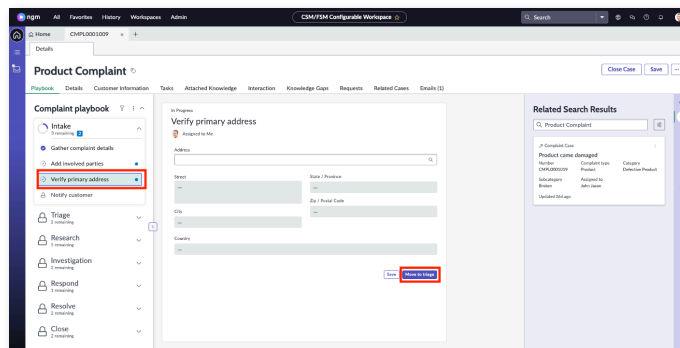
Click Continue



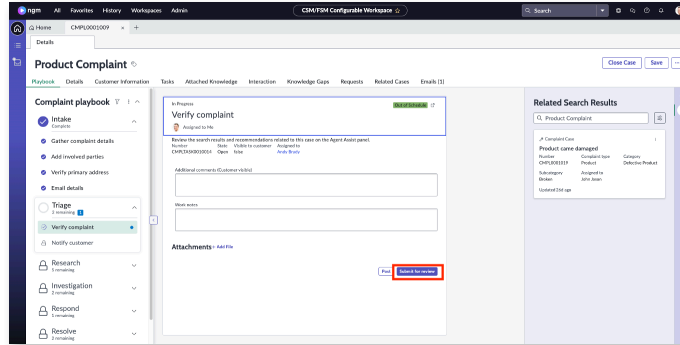
6. Click on Assign to me



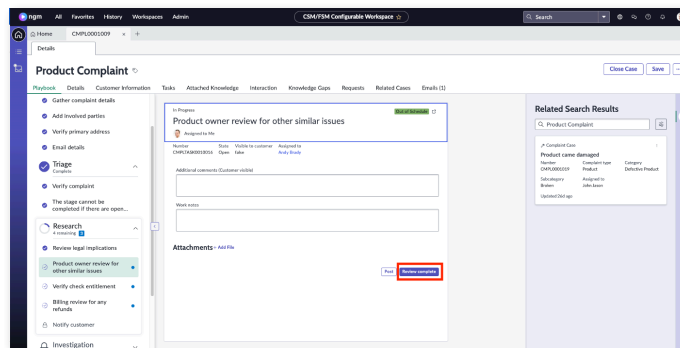
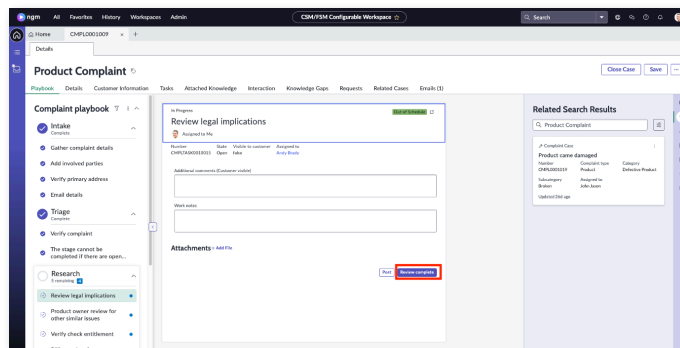
7. Click on Verify primary address and then click on Move to triage

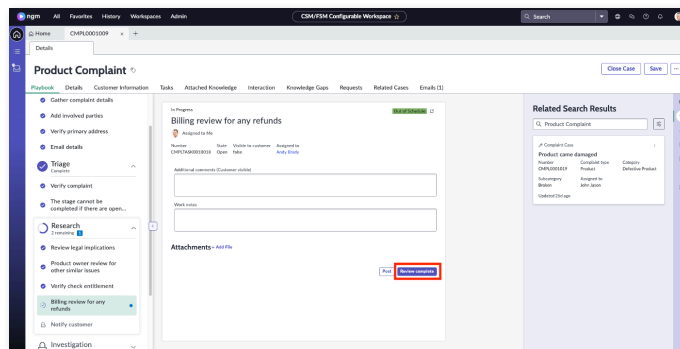
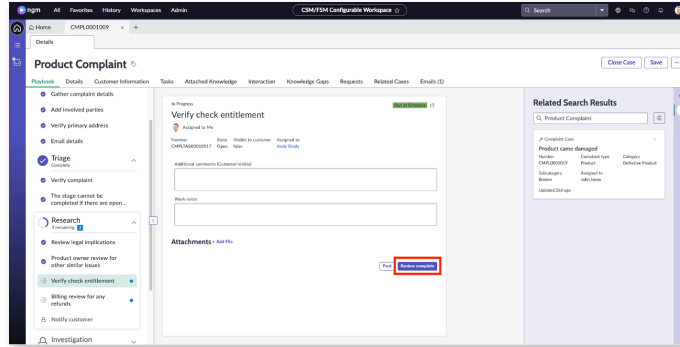


8. Once the screen is refreshed, click on Submit for review



9. Once the screen is refreshed, you'll be in the Research stage of the process. Click on Review Complete on the next 4 tasks as shown below:





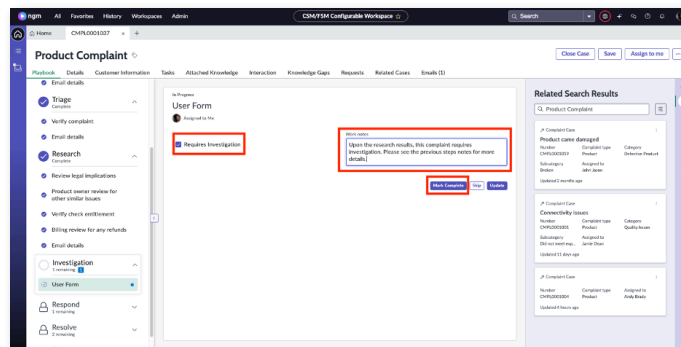
10. Once the screen is refreshed, you'll be in the Investigation stage of the process. This is the stage that you just created following the lab. On the form do the following:

Field Name	Value
Requires Investigation	checked
Work Notes	Upon the research results, this complaint requires investigation. Please see the previous steps notes for

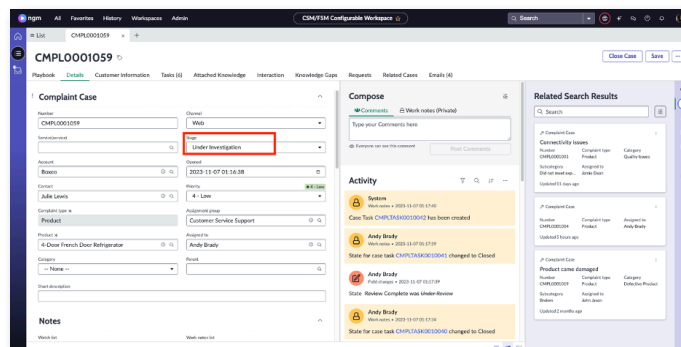


Field Name	Value
	more details.

Click on Mark Complete



- Now let's check the new stage of the case and verify that the case stage is automatically updated to **Under Investigation** because of the previous step. Click on **Details** tab. Observe that the **Stage** is automatically updated to **Under Investigation**



Congratulations! You just experienced the investigation stage that you added to the out of the box complaint management process. Let's stop here.

Our next section of the lab will focus on creating the Investigation App that the Legal Support team will use to execute the investigation.

# Create Investigation App with App Engine

## Overview


In this exercise, we'll see how IT and the business can partner to create applications to better support our customers.


## Personas

### ▶ Citizen Developer [*sit-uh-zuhn dih-vel-uh-per*]

Someone who, despite lacking formal coding training, engages in creating software applications and tools to solve specific business problems or enhance workflows. A citizen developer leverages low-code and no-code platforms to translate their domain knowledge into practical solutions.

In ServiceNow, this could be any user developing in Dev without the 'admin' role.

Devon Samrah	Business Process Owner & Citizen Developer
	Devon Samrah is a long time member of the Legal team and leads the Complaint Investigation team. Given her vast knowledge of the overall process, she is the perfect candidate to build a low-code app that supports the complaints investigation process.

Andy Brady	System Administrator
	As a ServiceNow System Administrator, Andy's primary responsibilities involve managing and maintaining the ServiceNow platform within an organization.

# Create Request for Citizen

## Development

---

Governance plays a key role in the success of any citizen development program. Our use case is no exception. Before Devon can build her application, she needs to request the access from the IT team. She will create a new request on the Employee Center portal and Andy, our platform administrator will review and provide his approval.

NOTE: In a real world environment, notifications in the form of email, text, platform notifications would take place. In our lab environment we will simply rely on the switching of users to see and approve the requests.

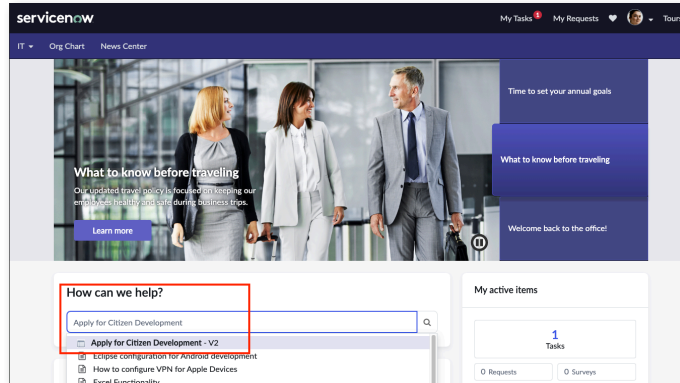
1. To get started, navigate to the Employee Center portal and impersonate our Citizen Developer, Devon Samrah. You can find the link to Employee Center on the landing page of your instance, but for quick reference -

<https://INSTANCENAME.lab.service-now.com/esc>

 NOTE

Replace INSTANCENAME with your personal lab instance

2. Type **Apply for Citizen Development** in the **How can we help?** search box and then click on the **Apply for Citizen Development - V2** option that appears.



3. Complete the form with the following fields:

Application Name:

Complaints Investigation

Describe your idea in a few sentences:

Right now, complaint cases are being logged in ServiceNow. We want to move our process from spreadsheets to ServiceNow to better serve our customers with a more consistent experience.

Does this involve any sensitive/PII data?

No

Who are the users that will have access to the data in the application?

All of the Complaints Investigation department including management.

**Apply for Citizen Development - V2**

This is the first step to empower you to develop and drive the development of your application.

Fill in the below form with specific details that would drive you to develop apps on App Engine Studio, and create the business value you need.

\* Application Name  
Complaints Investigation

Describe your idea in a few sentences  
Right now, complaint cases are being logged in ServiceNow. We want to move our process from spreadsheets to ServiceNow to better serve our customers with a more consistent experience.

Is your process repeatable?  
Yes

Do you have an email or excel-based process?  
Yes

How many users are involved in this?  
 >20  
 <=20

Does this involve any sensitive/PII data?  
No

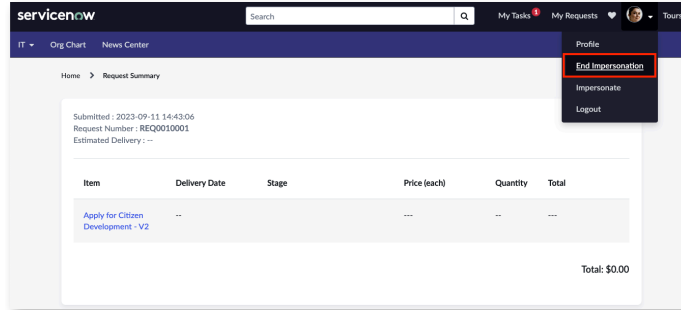
Do you need data from other departments?  
Yes

Who are the users that will have access to the data in this application?  
All of the Complaints Investigation department.

Submit

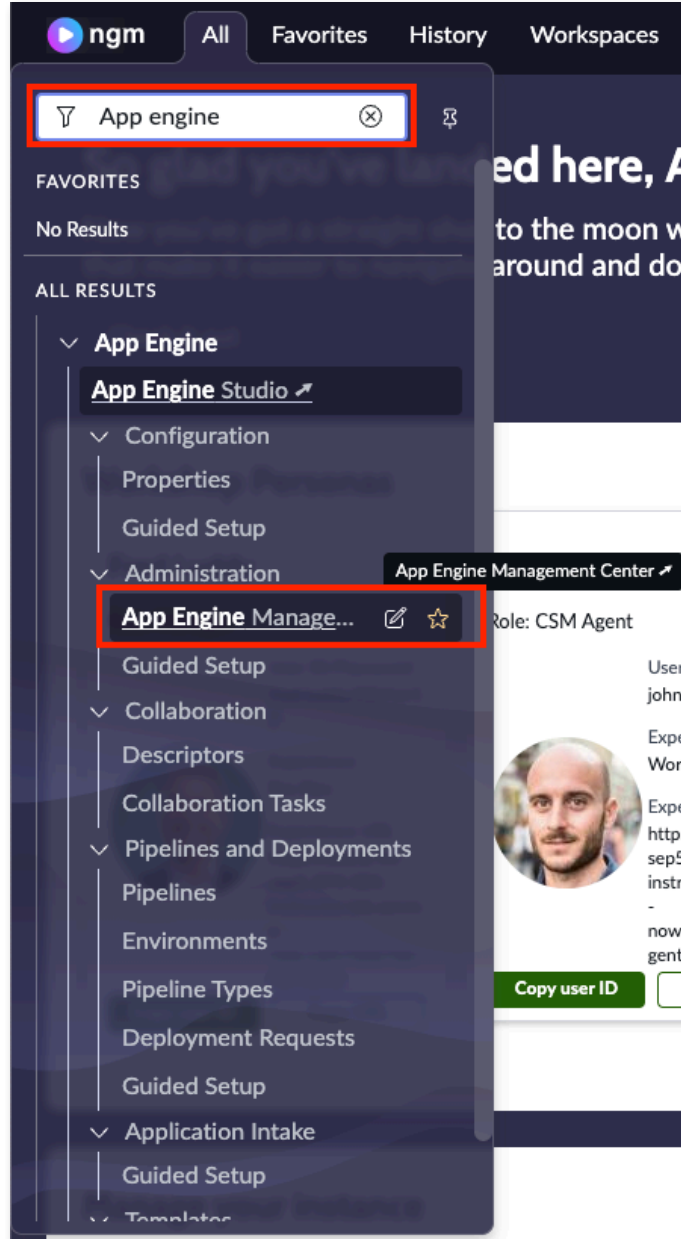
Once your form is complete, click **Submit**

4. *With our request submitted, we can now switch back to our platform admin persona, Andy, to approve Devon's request. Click on Devon's profile picture in the top right then click End Impersonation.*

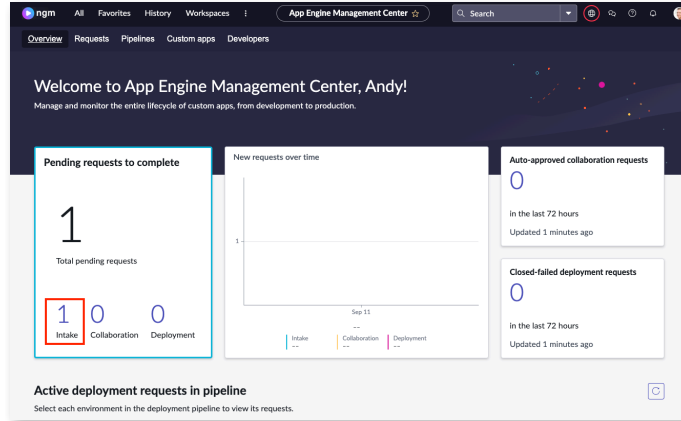


5. Now back on our platform landing page, click on **All** and search for **App Engine** in the filter nav. Choose **App Engine Management Center** from the options. AEMC loads in a new browser tab.

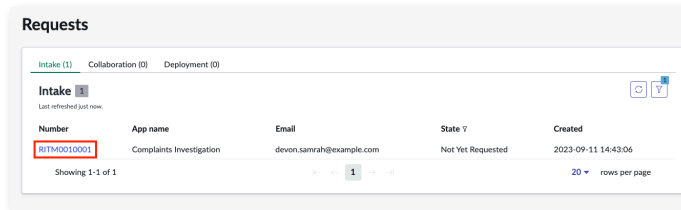




6. Here, Andy can see any new requests for applications, collaborations or application deployments. We see there is one new pending request to complete. Click on the 1 just above the word Intake.



7. We see there our request from Devon. Click on the number beginning with RITM to view it



**NOTE**

Your RITM number may vary from what is in the screenshot

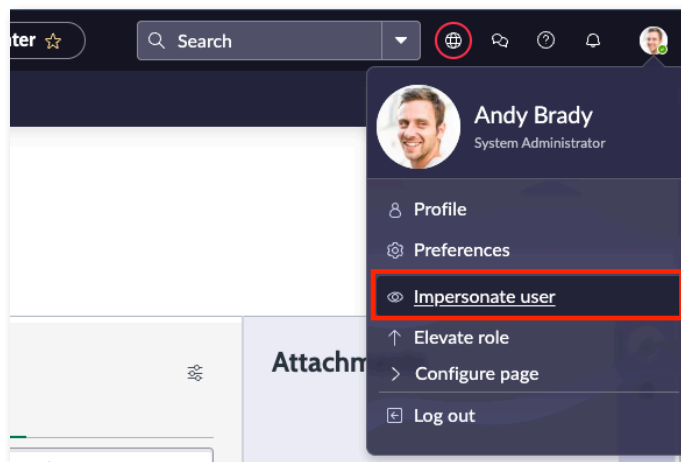
8. Next, we will specify the development environment and what access Devon will have as she is building her application. Scroll to the bottom of the request and choose Development from Development Instance and Create/edit applications (AES User Group) from the Permission type field.

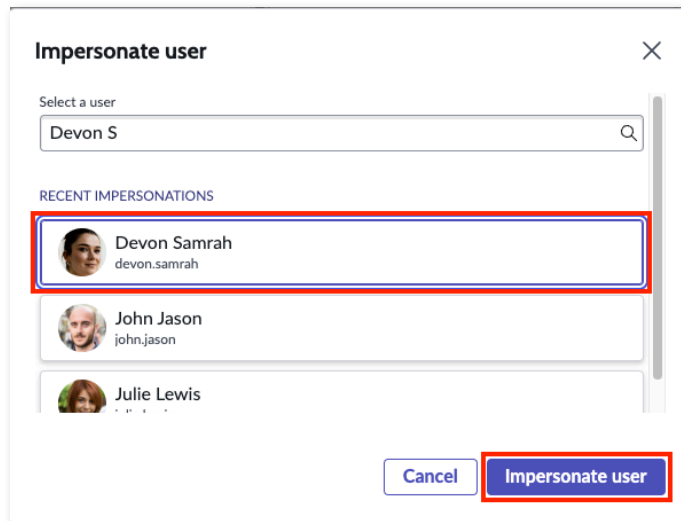
**Administration**

Development instance  
Development

Permission type  
Create/edit applications (AES User Group)

9. Once complete, save the request record. Since we are operating in a lab environment and this is NOT a governance workshop, we've reconfigured Devon to have the access she needs without requiring a complete pipeline configuration. We can now move on to impersonating Devon again and build our Complaints Investigation app. Click on Andy's profile picture in the top right and click Impersonate User. Choose Devon Samrah from the list.





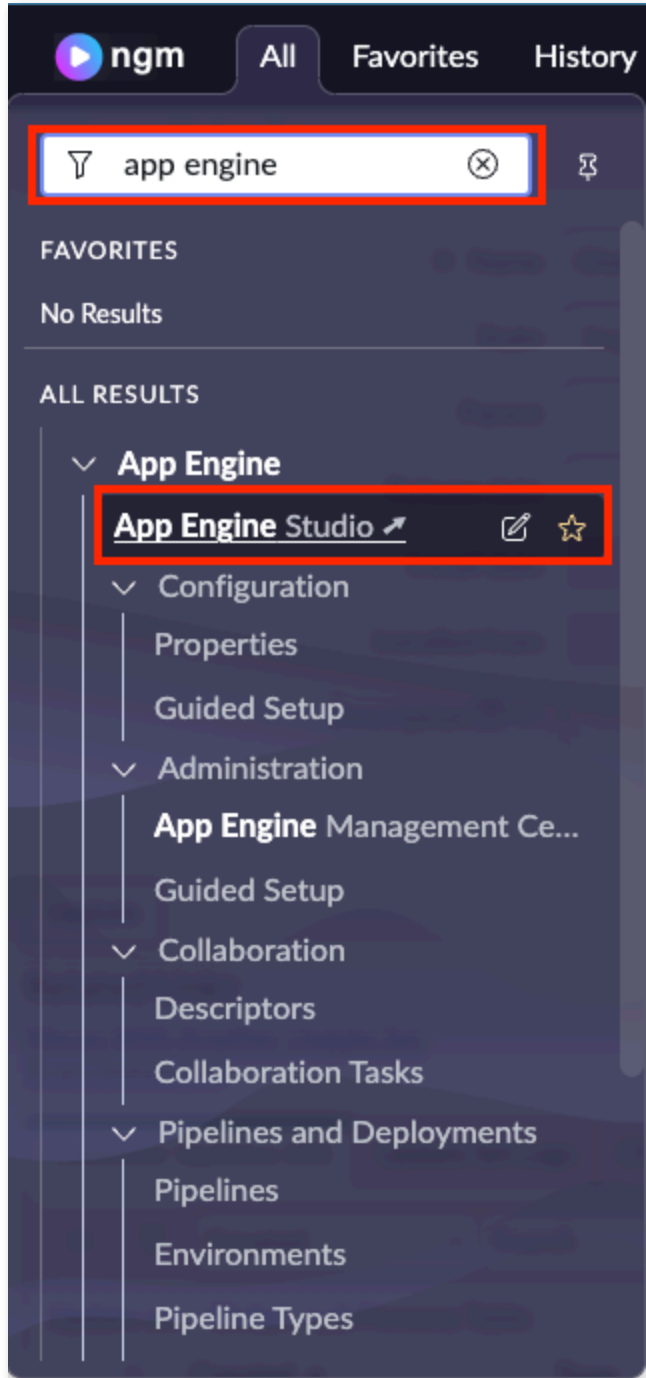
Click Impersonate User to complete the switch to Devon's persona.

Nice work! You've just set things up for Devon to be able to create her app. Now let's move on to the next exercise, creating the complaints investigation app.

# Create Application in App Engine Studio

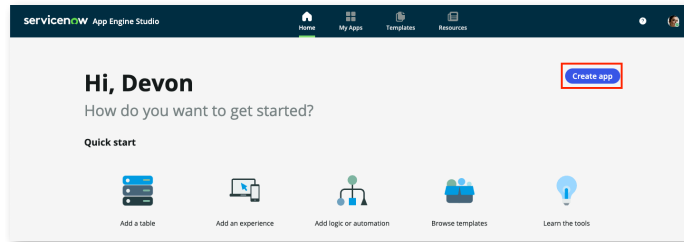
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1. Type app engine studio in the Filter Navigator and then click on the App Engine Studio link. App Engine Studio will open in a new browser tab



2. Once App Engine Studio opens click the **Create app** button in the upper right of the screen.

NOTE: if you get a **Getting Started** message, you can close it.



3. Enter the following for each field:

Name

Complaints Investigation

Description

This app is designed to streamline customer complaint investigations

**CREATE APP**

### Let's get started on your new app.

Add a name and description that define the purpose of your app. You can also add a thumbnail image.

Name \* ⓘ  
Complaints Investigation

Description ⓘ  
This app is designed to streamline customer complaint inv

Drag app logo or browse to upload

BMP, GIF, ICO, JPEG, JPG, PNG, SVG

Cancel Continue

4. App Engine Studio will create default roles for admin and user of our application. Users assigned these roles will be members of the team responsible for investigating the complaints. Accept the default admin and user roles and select Continue.

**CREATE APP**

### Let's add roles to your new app.

Default roles have already been added based on popular roles for apps. You can add or remove roles, later.

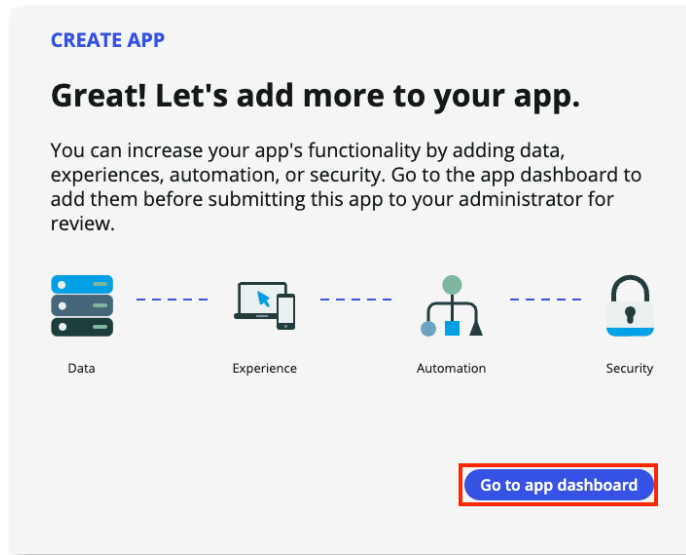
+ Add a role

Role name * ⓘ admin	Description ⓘ Default admin role	🗑️
Role name * ⓘ user	Description ⓘ Default user role	🗑️

Cancel Continue



5. Select the Go to app dashboard option once the app is created.



Nice work.. you've just created the foundation of our Complaint Investigation app. Now let's move on to the next exercise, creating our data model.

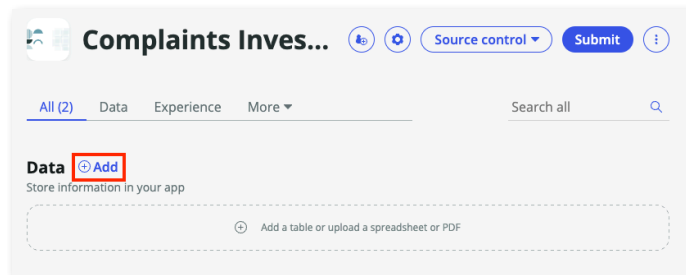
# Create Application Data Model

---

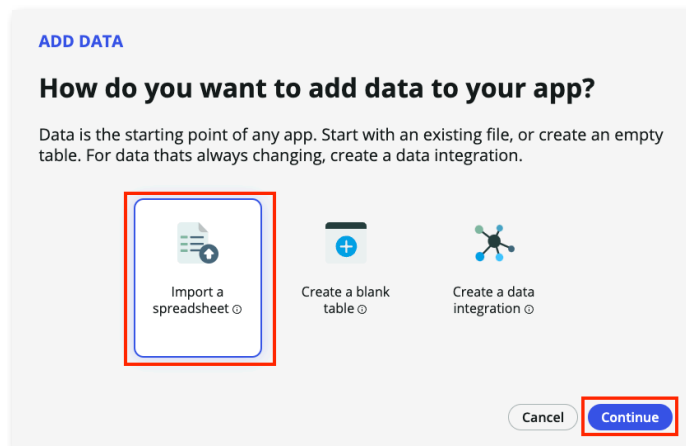
In this exercise will start building out the tables needed to support out application. We'll import a spreadsheet to quickly populate the table with existing data. This is a very common way customers are building tables in App Engine Studio for processes that are currently being administered in Excel and email.

Data can also be imported from other third-party sources like a database or web service/API.

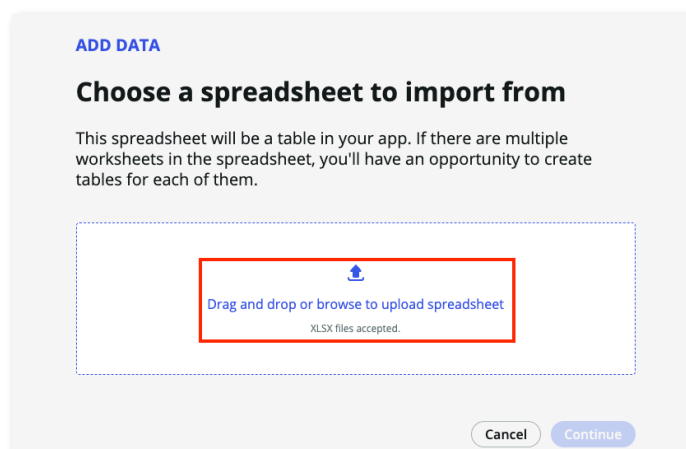
1. On the app homepage, click on **+Add** next to **Data**.



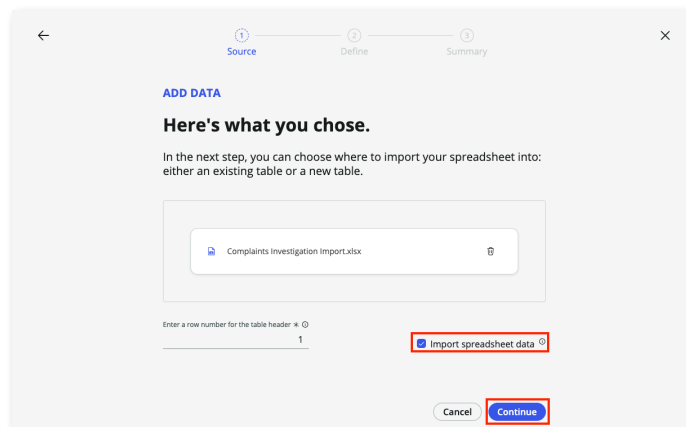
2. Select **Import a spreadsheet** and then the **Continue** on the next screen



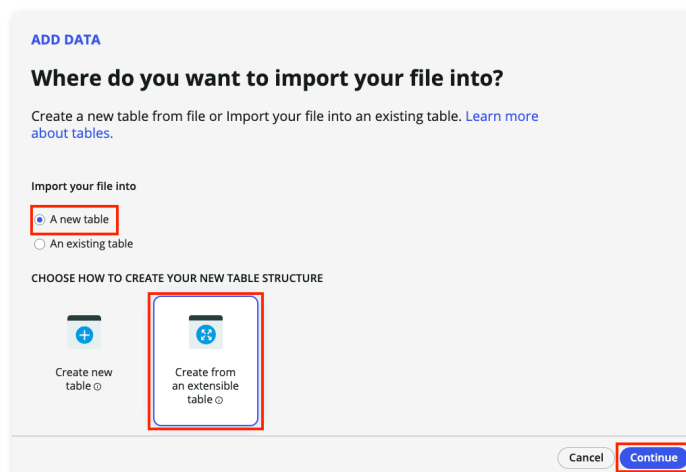
3. Click Drag and drop or browse to upload spreadsheet. Download this file: [ComplaintsInvestigationImport.xlsx](#) and upload the file to the instance.



4. Check the Import spreadsheet data checkbox and click Continue



5. On the next screen, keep the default option of **A new table** and choose **Create from an extensible table** then click **Continue**



6. Search in the **Table** field for **Customer** and choose **Task** from the list. Click **Continue**

**ADD DATA**

### Which table do you want to use?

We'll add the table's data to your app. Essentially, you are creating an extension with branching logic.

Table  
**Customer**

Recommended tables

Case  
 Stores **customer** service case records.

All other tables

Card Configuration  
 sn\_customercentral\_card\_config

**Task**  
 sn\_customerservice\_task

Continue

- Set the Table label field to Complaint Investigation Select Auto number Set the Prefix field to CMLINV

**ADD DATA**

### Now, let's get more info about your new table

Define the properties of your new table.

Table label \*

Table name prefix \*       Table name \*

Make extensible  **Auto number**

Prefix \*       Starting number \*       Number of digits \*

Cancel    **Continue**

**!** INFO

Setting the Prefix allows us to distinguish our tasks from records created that are also extended from the Customer Service Task table.

8. The next step is to setup permission for the Complaint Investigation table. Assign full permissions to the admin role by selecting **All**. Select the **Create**, **Read** and **Write** permissions for the user role. When finished, click **Continue**.

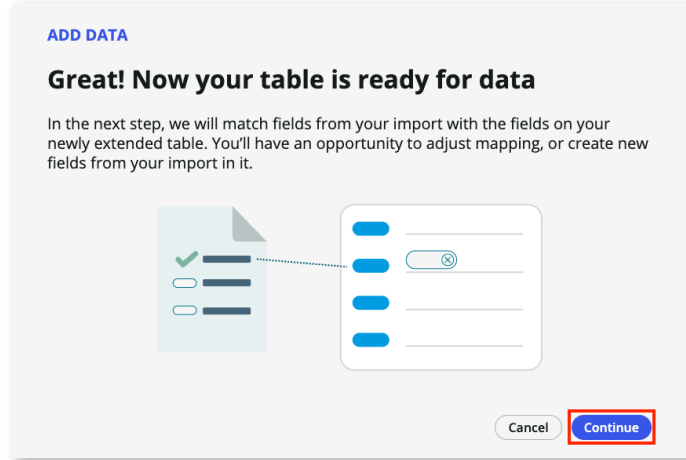
**ADD DATA**

**Let's add permissions to your table.**

Create roles and define how much control each role has of this table. Note: at least one role needs to have 'read' access for you to 'preview' the data in your table.

Role Name	Description	All	Create	Read	Write	Delete
admin	Default admin role	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
user	Default user role	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

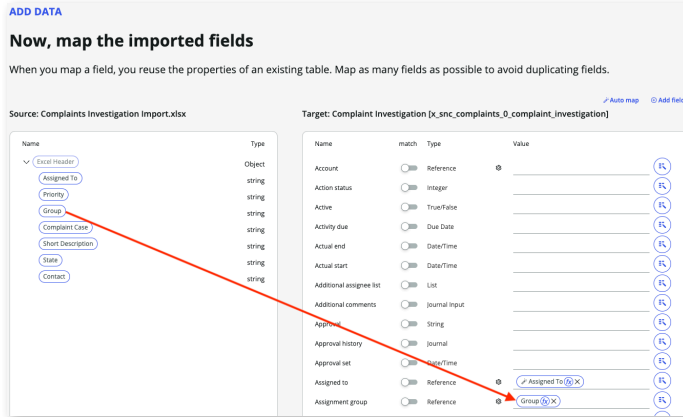
9. Now, we wait for the platform to create our table. Select **Continue** once the table is created to move on to mapping our imported data to the appropriate fields.



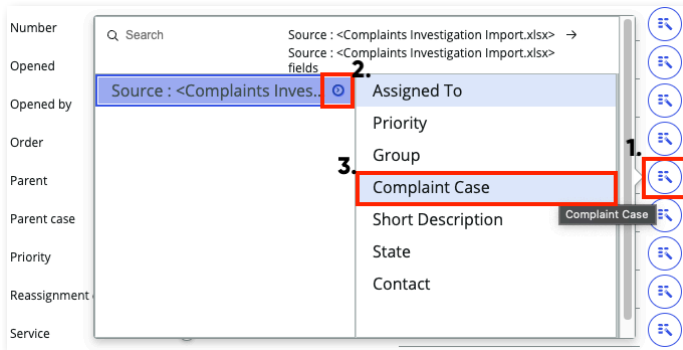
10. Once the screen loads, you can exit out of any guided tour popup that may appear initially. Looking at the right hand column, you'll notice the platform automatically mapped our fields for us! This is indicated by the wand icon next to the column name



11. Scroll through the list to ensure all your fields are accounted for. You'll notice that **Group** is not associated with the **Assignment Group** field on our table. Drag and drop it from the left side to the right next to the **Assignment Group** field.



- We also need to associate these existing complaint investigations with the cases they are related to. Scroll down until you see the **Parent** field on the right. Click the magic wand icon on the right of the field then the small arrow next to **Source** and choose the **Complaint Case** option from the menu.

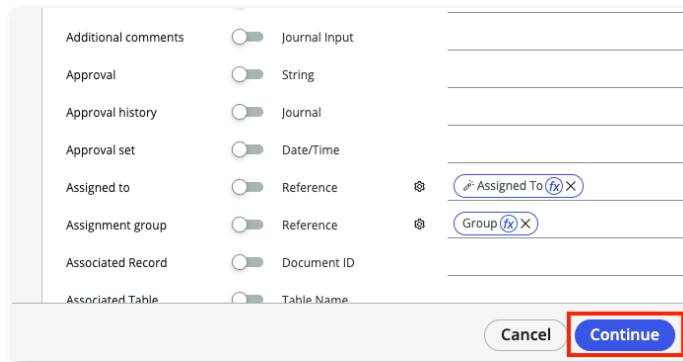


**! INFO**

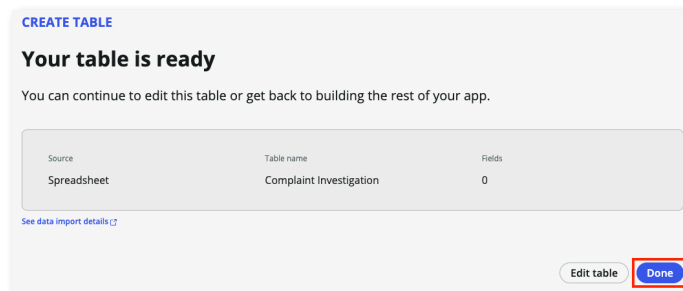
This is referred to as 'dot-walking'.

- Click Continue

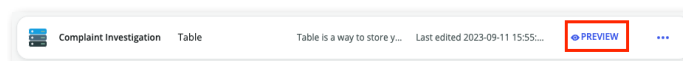




14. Click Done once the table has been created to return to the App Home.



15. Let's check our table to make sure the data is mapped correctly. You should see our newly created Complaints Investigation table listed under Data. Click on the Preview link

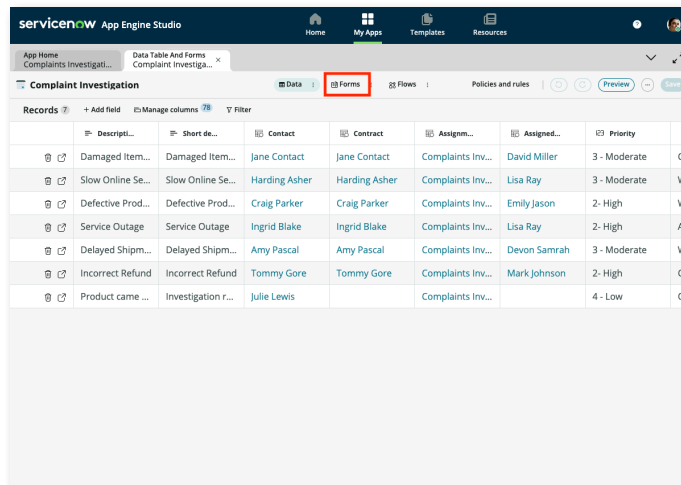


16. Your screen should look similar to the one below

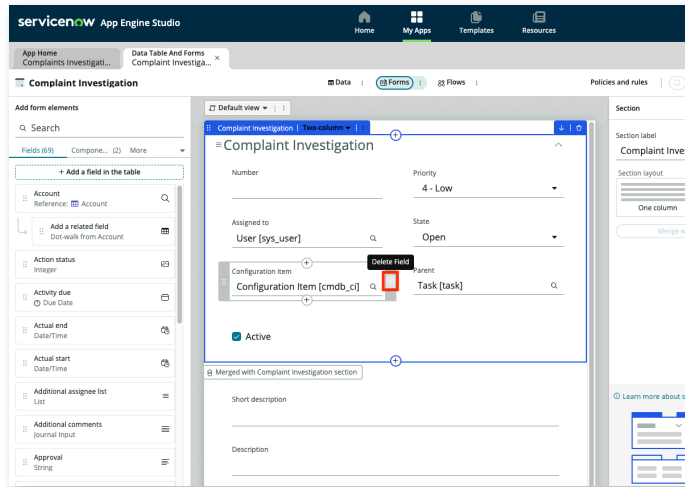
Description	Subject	Contact	Contract	Assignment group	Assigned to	Priority	State	Parent
Damaged Item Received	Damaged Item Received	Jane Contact	Jane Contact	Complaints Investigations	David Miller	3 - Moderate	Closed	CMPL0001015
Slow Online Services	Slow Online Services	Harding Asher	Harding Asher	Complaints Investigations	Lisa Ray	3 - Moderate	Work In Progress	CMPL0001001
Defective Product	Defective Product	Craig Parker	Craig Parker	Complaints Investigations	Emily Jason	2 - High	Work In Progress	CMPL0001002
Service Outage	Service Outage	Ingrid Blake	Ingrid Blake	Complaints Investigations	Lisa Ray	2 - High	Awaiting Info	CMPL0001005
Delayed Shipment	Delayed Shipment	Amy Pascal	Amy Pascal	Complaints Investigations	Devon Samrah	3 - Moderate	Work In Progress	CMPL0001009
Incorrect Refund	Incorrect Refund	Tommy Gore	Tommy Gore	Complaints Investigations	Mark Johnson	2 - High	Closed	CMPL0001013

Once you've finished reviewing the data, close the window to return to App Engine Studio

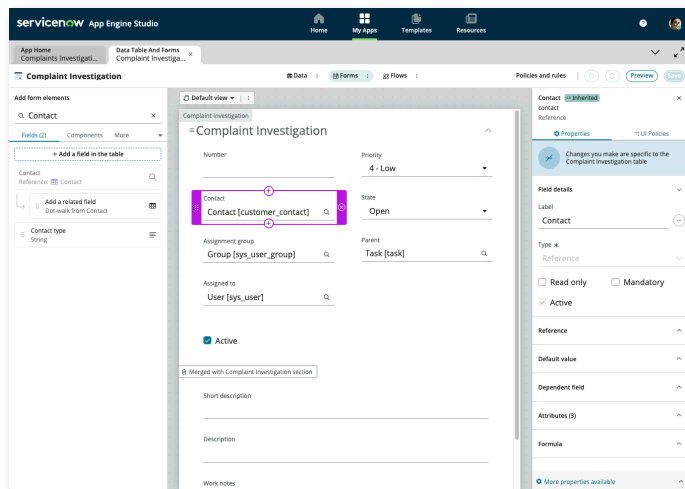
- Next, let's focus on the data we want to be shown on the screens when viewing these investigation records. In App Engine Studio, click on the table and click on Forms at the top of the screen to open Form Builder



- To make this form more useful for us, remove the Configuration Item field by hovering over the field and clicking on the X that appears



- Now we'll add some fields that help us with our investigation process. On the Add form elements side bar, search for the Assignment Group field and drag/drop it on the form. Repeat the process for Contact and save your form once complete. Your form should look similar to below

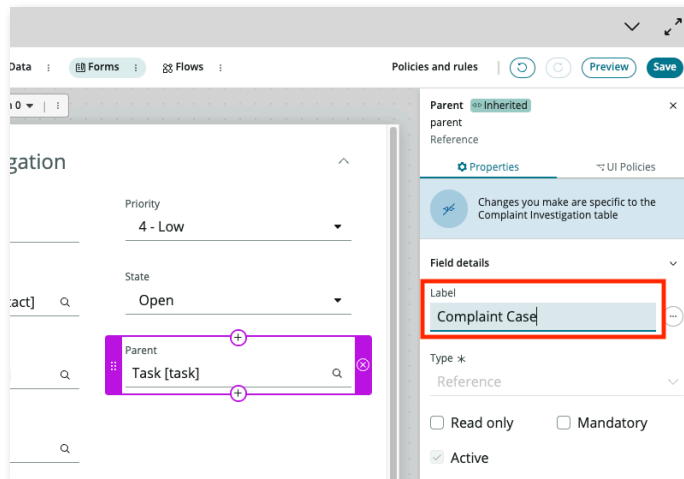


- Let's also rename the Parent field so it is more meaningful for our process. Click on the Parent field and change the Label field in the right configuration

section to say **Complaint Case** and click **Save**

**!** INFO

This label change will only be reflected in our Complaint Investigation table and will not impact the rest of the platform.



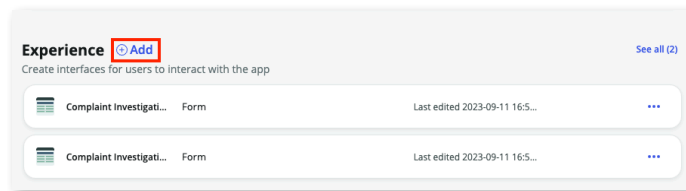
Excellent! Now that we have our legacy data in the platform, let's look to see how we create our own Workspace to start managing these investigations using ServiceNow!

# Create Investigations Workspace

---

We've got our data, now we need to work on the experience for our investigations team. Similar to John Jason in the earlier lab, we'll configure our workspace to ensure we don't miss important investigations and provide our customers with the best customer experience.

1. On the app homepage, click on **+Add** next to Experience.



2. Select **Workspace** from the next screen and then **Begin**

ADD EXPERIENCE

### What type of experience do you want to add to your app?

Select an experience to learn more about the interface and what it can do for your users.

The image shows four experience options arranged in a 2x2 grid. Each option includes a small screenshot of the interface and a brief description. The 'Workspace' option is highlighted with a red border.

- Workspace**: A workspace helps users manage and fulfill requests sent to them.
- Standard catalog item**: People can add ways to request a good or service.
- Record producer**: People can create records using a catalog item.
- Portal**: Deliver apps to your employees or customers using a modern, easy to use portal.

ADD EXPERIENCE

### A workspace helps users manage and fulfill requests sent to them.

The screenshot displays the 'now' workspace interface. At the top, there's a navigation bar with 'List' and 'CS0001088'. Below that, a 'Details' section shows the case title 'Upgrade to new router not successful' and buttons for 'Close Case', 'Save', 'Create Work Order', 'Propose Solution', and 'Request Info'. The main area is divided into several sections: 'Contact' for George Warren, 'Timeline' showing a progress bar, and 'Case - Priority 2 resolutio...'. At the bottom, there's a 'Compose' section for adding comments and a 'Related Search Re...' section. A red-bordered 'Begin' button is located in the bottom right corner.

3. Leave everything as default on the next screen

## ADD EXPERIENCE

### Let's design your Workspace

This experience needs a name, description and URL.

Name \* ⓘ

Complaints Investigation

Description ⓘ

Enter a description

URL \* ⓘ

complaints-investigation

/now/complaints-investigation

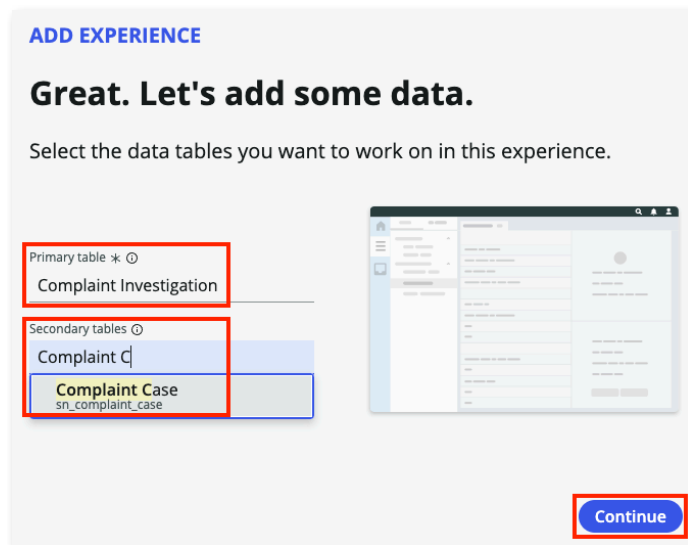
Roles ⓘ

x\_snc\_complaints\_0.admin x x\_snc\_complaints\_0.user x

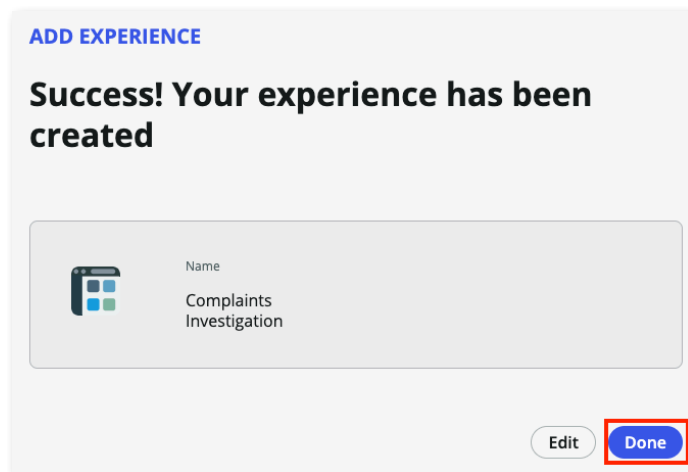
Cancel

Continue

4. Ensure Complaint Investigation is listed as the Primary table. For Secondary tables, choose Complaint Case so we can see those on our workspace as well

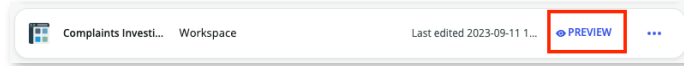


5. Once the Workspace has been completed, click Done

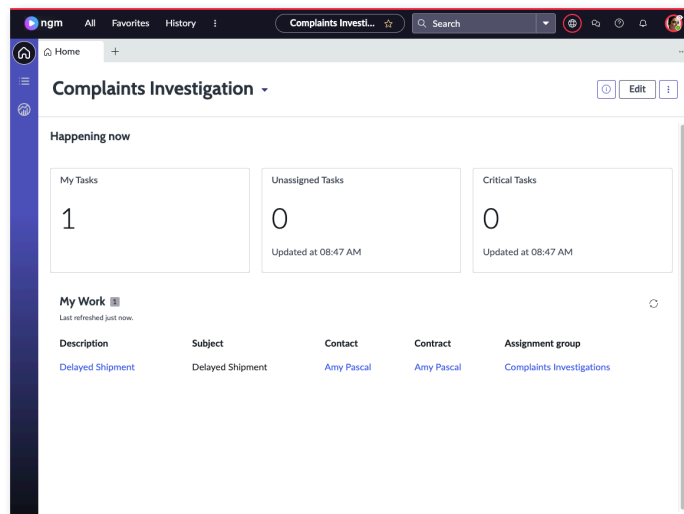


6. Back on our App Home page, click on Preview next to our new Complaints Investigation Workspace.

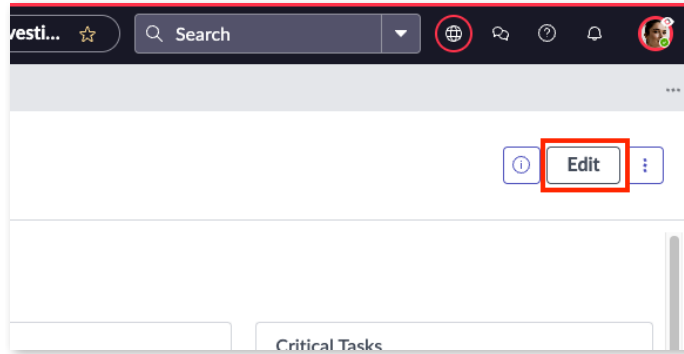




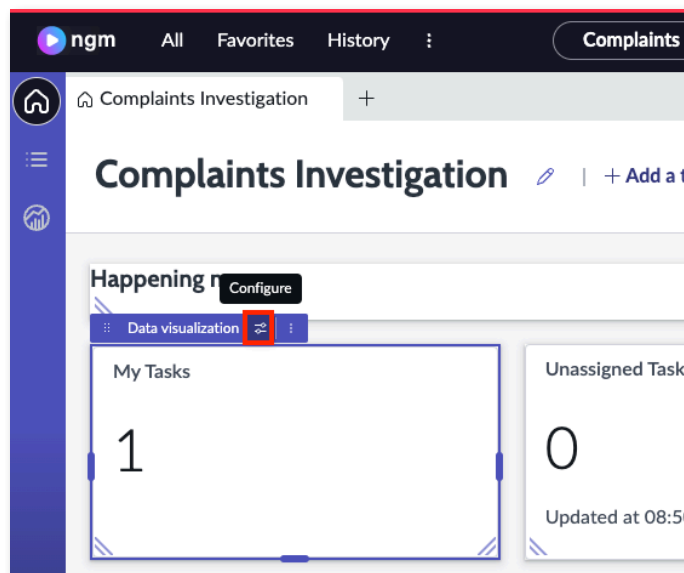
7. Since we uploaded our existing spreadsheet, you should see some existing records in our workspace. Your workspace should look similar to this one:



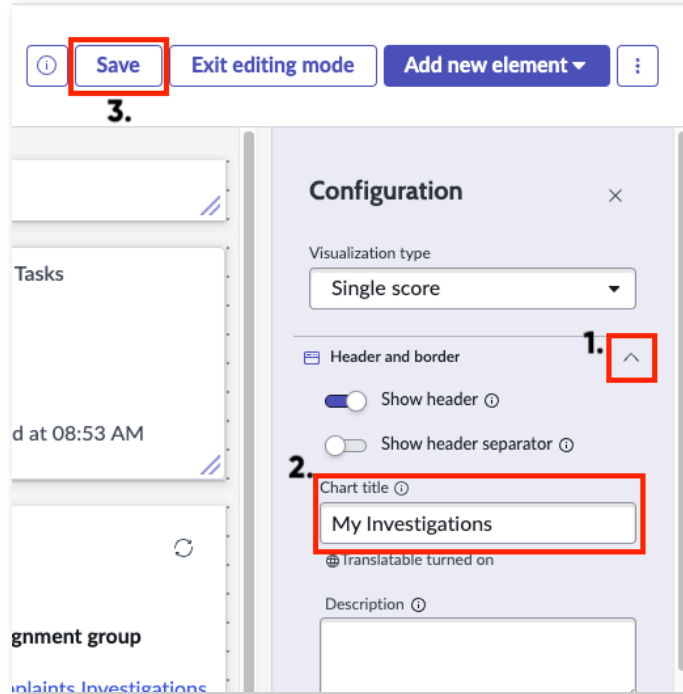
8. Let's use Workspace Builder to configure this workspace to our needs. Click Edit at the top of the screen



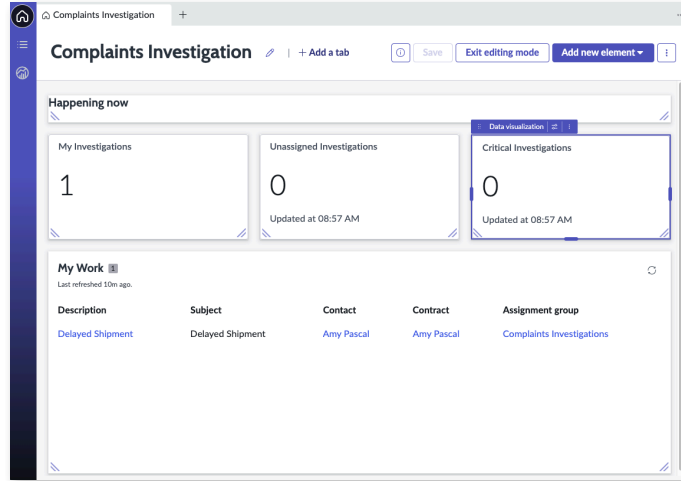
9. Click the My Tasks component then click the Configure button



10. On the Configuration pane that appears, find the Header and border section and click the down arrow to expand it. Change the Chart title to My Investigations then click Save



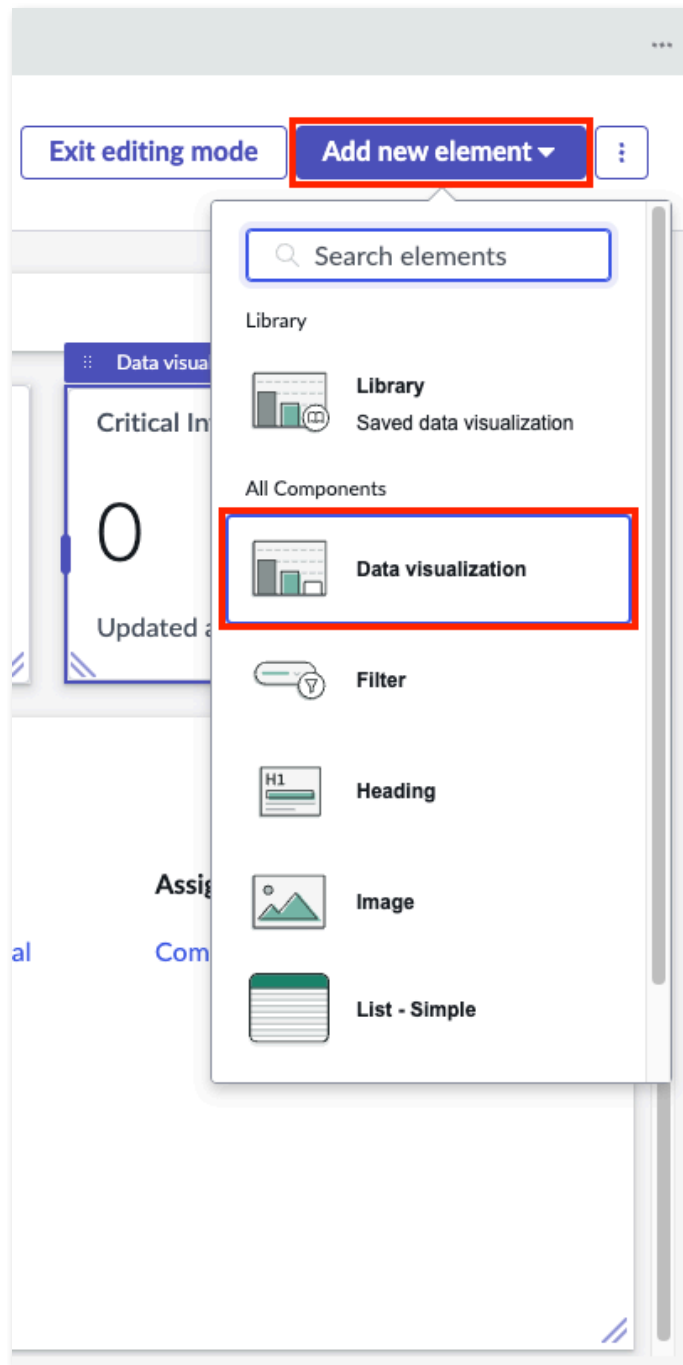
11. Repeat step 10 for the remaining widgets replacing the word Tasks with Investigations. Your workspace should look like similar to the below workspace when complete.



 DANGER

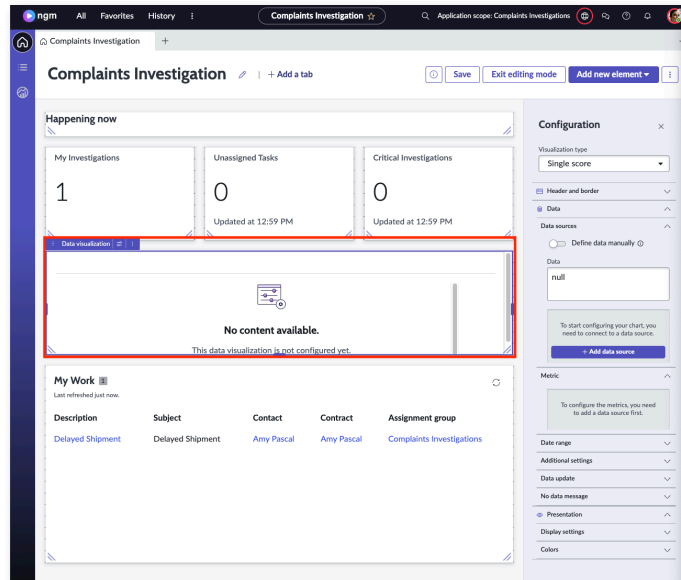
Before we move on **SAVE YOUR WORK!**

- Next, let's add a new Data Visualization widget to our workspace so we have some visibility into the overall landscape of Complaints Investigations. Click on **Add new element** at the top and choose **Data visualization**

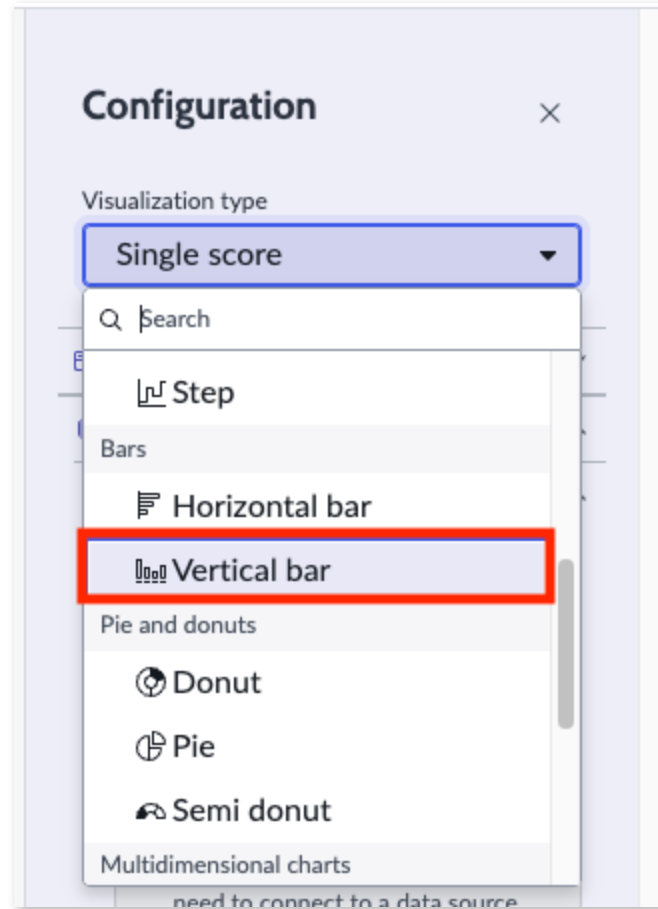


13. The new component will be added to the bottom of the workspace by

default. Drag it up just above My Work and resize it to match the My Work list below.



14. Now let's configure the new widget. On the configuration pane, choose Vertical Bar from the Visualization type list.



15. Find and expand the Header and border section. For the Chart Title enter:

Complaint Cases by Account

## Configuration ✕

Visualization type

Vertical bar ▾

---

☰ Header and border ∧

Show header ⓘ

Show header separator ⓘ

Chart title ⓘ

Complaint Cases by Account

🌐 Translatable turned on

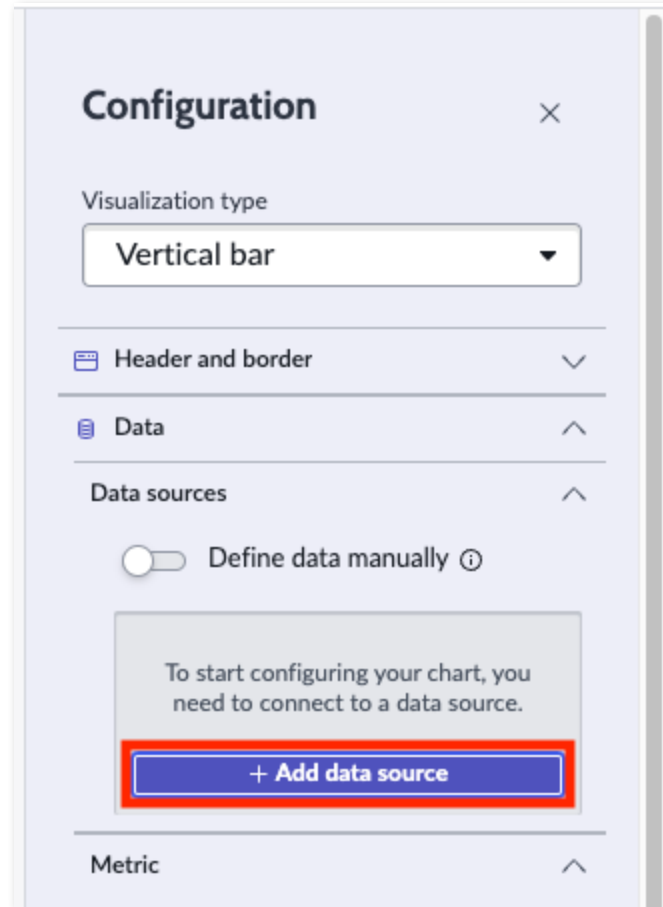
Description ⓘ

Wrap title ⓘ

Show border ⓘ

1. Under the Data section, click Add data source

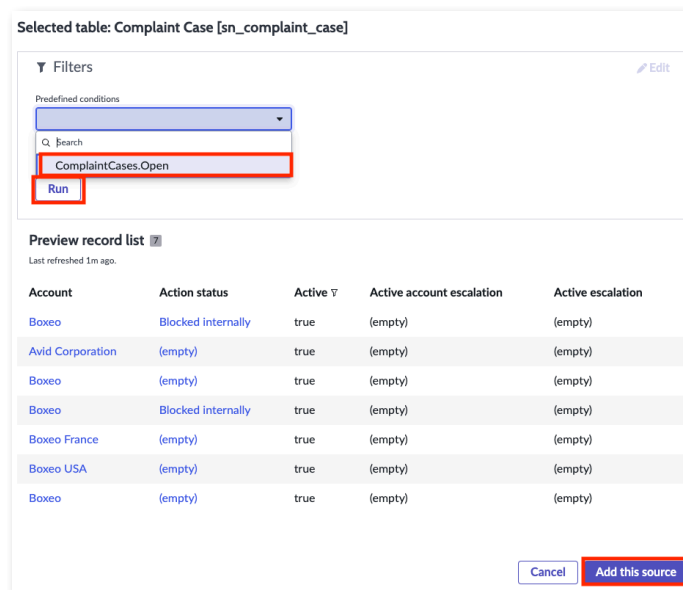




17. On the Add data source page, search for Complaint Case and click on the option when it appears.



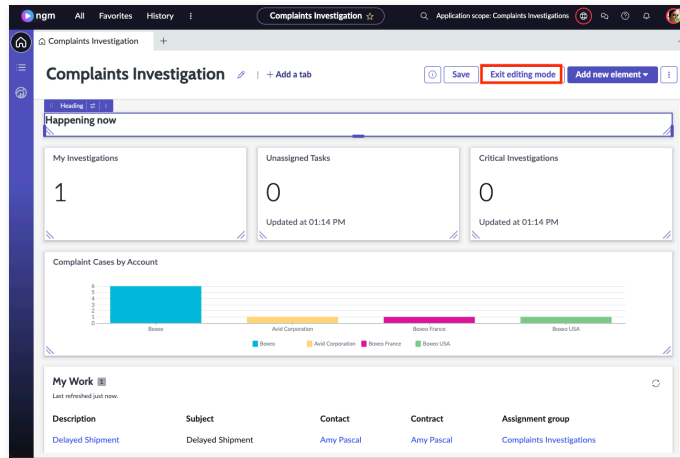
18. Under Predefined conditions choose ComplaintCases.Open and click Run. Ensure that data is displayed then click Add this source



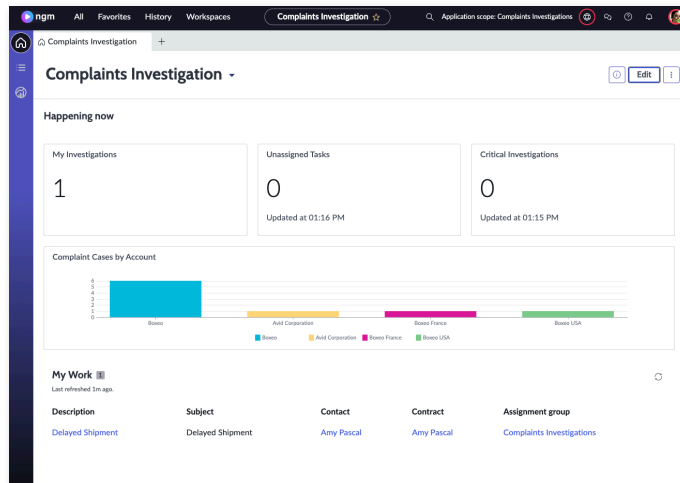
19. Save your work and click Exit editing mode

**!** INFO

Before saving, it may be necessary to do some resizing of the components on the screen. Feel free to do so as needed.

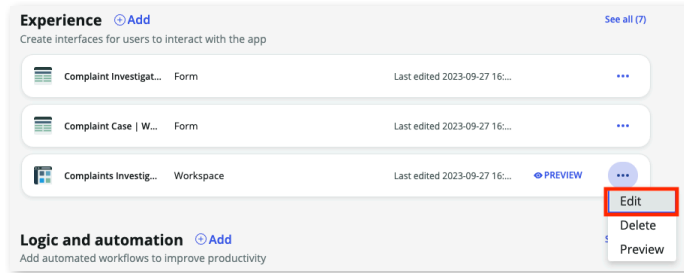


20. Your dashboard should look similar to the screenshot below

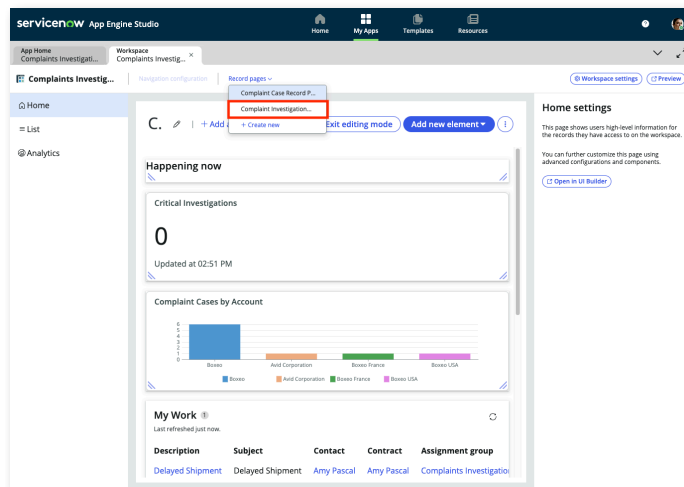


21. Now that we have our homepage complete, let's take a look at the record

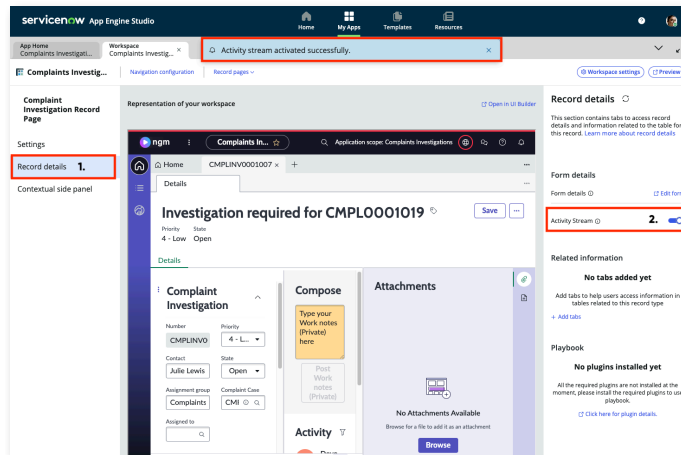
pages and ensure we can see the activities that take place on these investigation records. Back on your **App Home** screen, find your workspace under the **Experiences** section, click the ... on the right and click **Edit**



- This takes us to **Workspace Builder**. Click on **Get started** if you get a pop-up screen welcoming you. At the top under **Record pages** click on **Complaint Investigation**



- Click on **Record details** in the left panel then toggle **Activity Stream** in the right panel. You should see a message indicating that we have successfully activated the activity stream



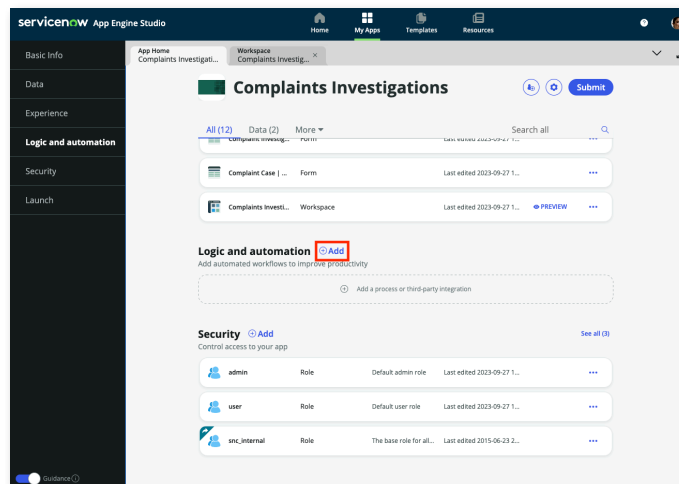
That's it! You've just successfully configured a new dashboard for Complaints Investigations team and added features to the form that will help the team work more efficiently in the complaints investigation process!

Feel free to add additional data visualization and components to get a better feel for the flexibility of the dashboards and workspaces.

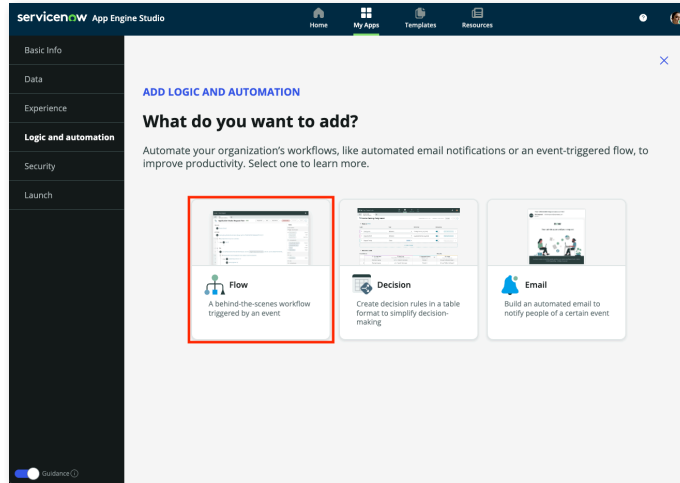
# Create Flow in Flow Designer

In this exercise, we'll tie our investigation process together with the Complaints Management module in CSM so we can wave bye-bye to those spreadsheets!

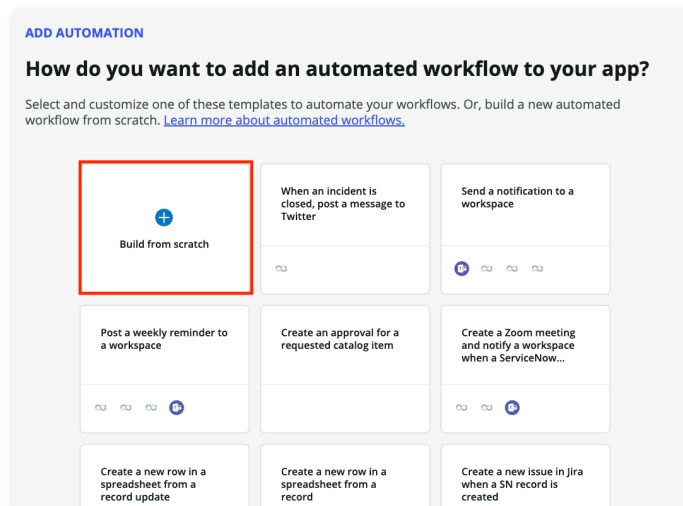
1. If you haven't done so already, close your workspace and go back to your App Engine Studio window. In the Logic and Automation section, click on Add



2. There are several options for automation when building an app as a low code developer on the ServiceNow platform, but today we will be focusing on workflow. So on this screen, choose Flow from the options



3. To help you get started quickly, we've provided a set of common flows we see our customers building. In addition to that, we've built these flows with pre-existing integrations to collaboration tools like Teams. We, however, will be starting from scratch. Click on **Build from scratch**



4. Set the following values for your new flow and click Continue:

Name:

Complaint Investigation Flow

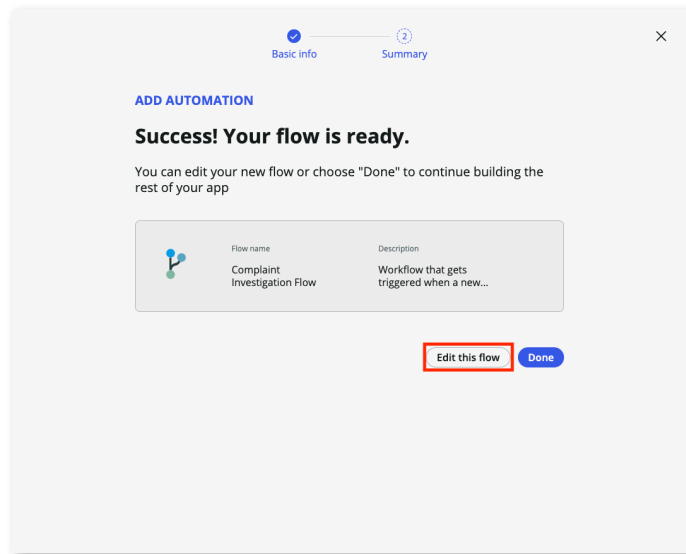
Description:

Workflow that gets triggered when a new complaint is received and requires investigation.

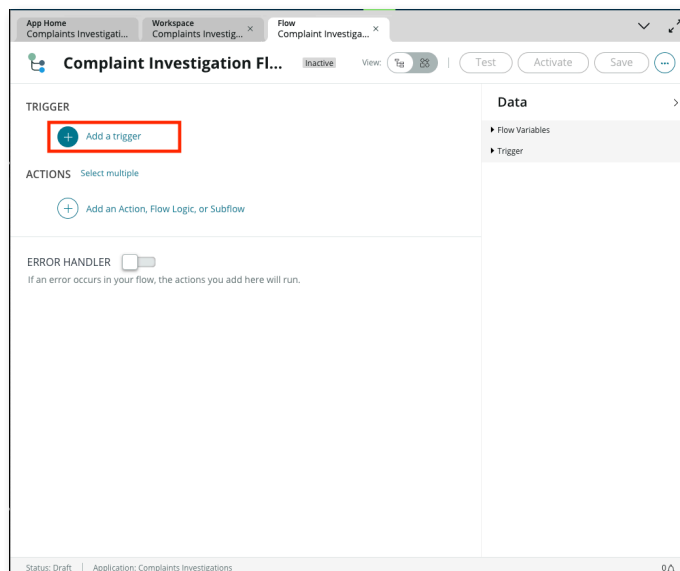
The screenshot shows a dialog box titled 'ADD AUTOMATION' with a close button (X) in the top right corner. At the top, there are two tabs: 'Basic info' (selected) and 'Summary'. Below the tabs, the text reads 'Let's set up your flow' and 'This flow needs a name, description, and other details.' There are two input fields: 'Name \*' containing 'Complaint Investigation Flow' and 'Description' containing 'Workflow that gets triggered when a new complaint is received and requires investigation.' Below the description field is a link 'Show advanced options' with a downward arrow. At the bottom right, there are two buttons: 'Cancel' and 'Continue' (highlighted with a red box).

5. On the Success! Your flow is ready screen, click Edit this flow

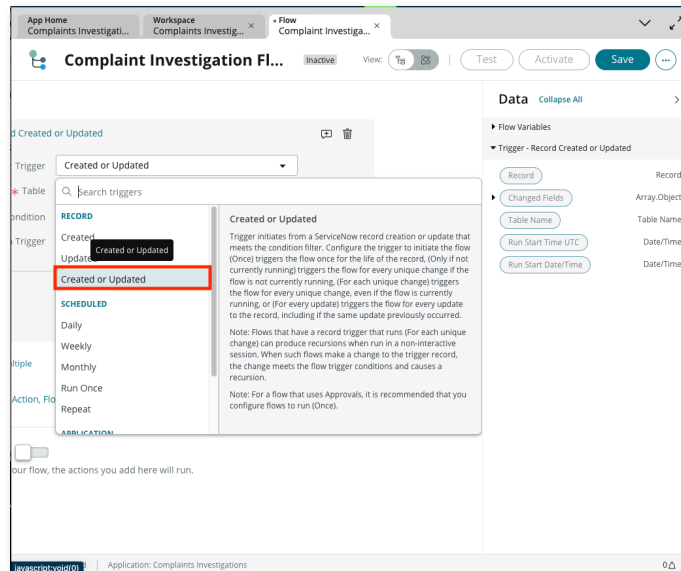




6. This will open Flow Designer where we can define our trigger and our resultant actions in our workflow. Click Add a trigger

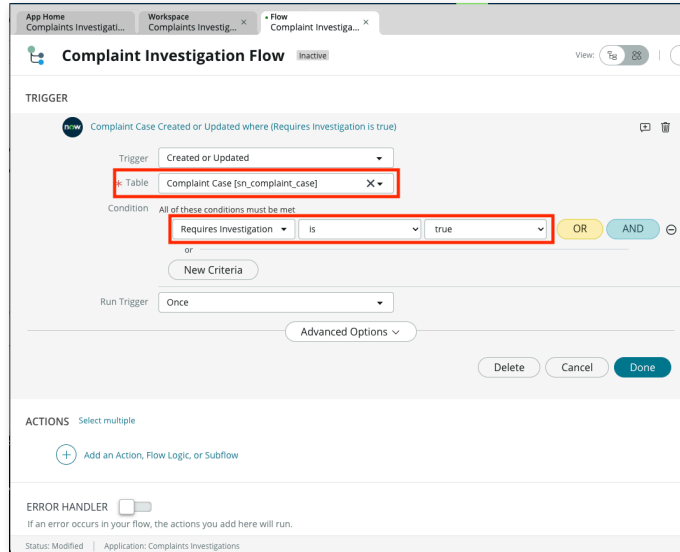


7. Choose Created or Updated in the dropdown.

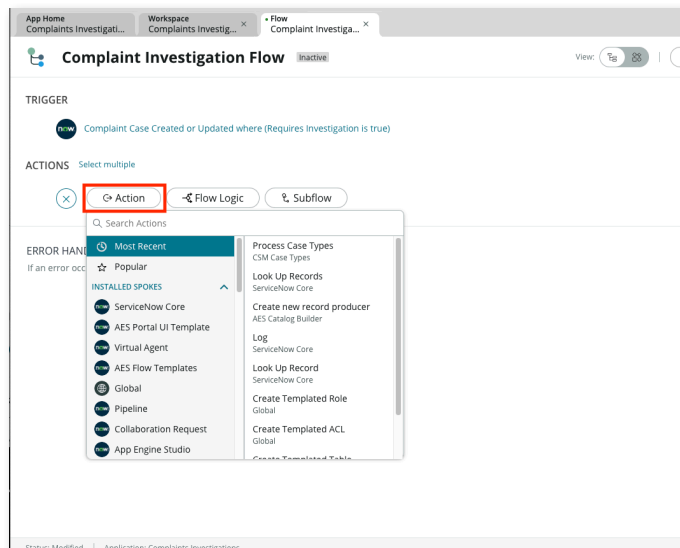


8. To complete the trigger configuration, set the following values and click Done:

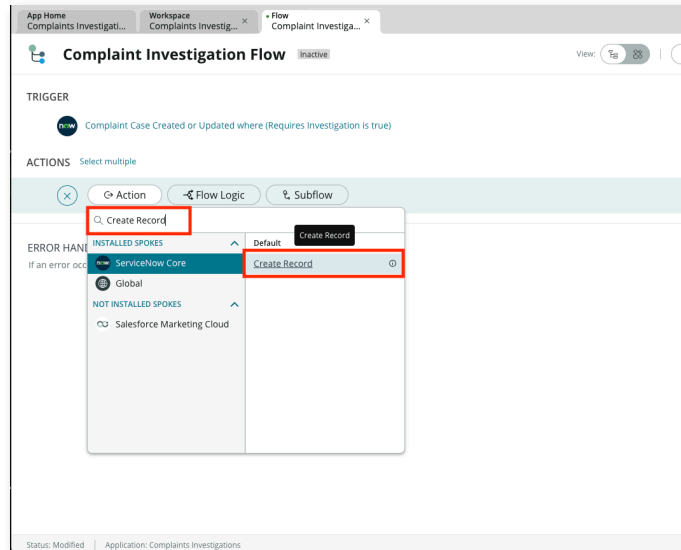
Field Name	Value
Table	Complaint Case [sn_complaint_case]
Condition	Requires Investigation is True



- Now that we know when our flow is going to execute, let's tell it what we want it to do. Under Actions click the + Add an Action, Flow Logic, or Subflow then click Action



- In the Search Actions field, type **Create Record** and choose the **Create Record** option listed in the right column



- Set the Table field to our **Complaint Investigation** table we created in our first exercise in App Engine Studio. Then set the Fields as shown below then click **Done** when complete:

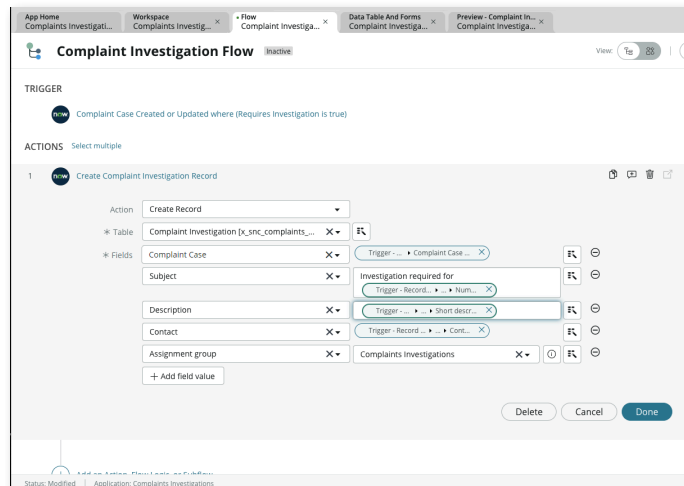
**NOTE**

Values highlighted in bold below indicate we are dot walking to the fields we need in our workflow

Field Name	Value
Complaint Case	Trigger - Record Created or Updated - Complaint Case Record

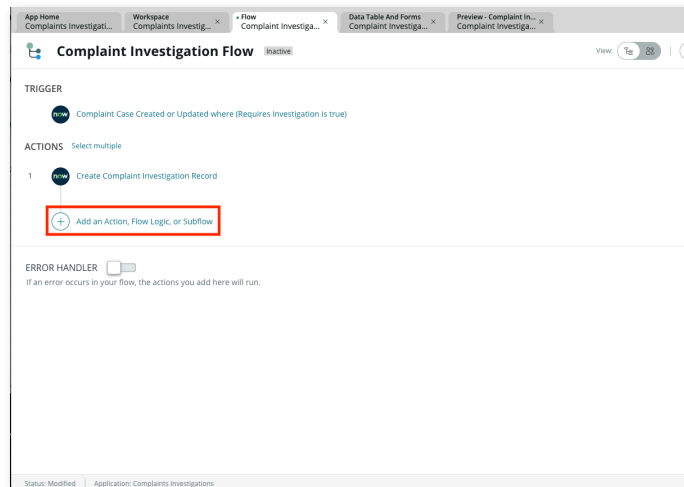
Field Name	Value
Subject	Investigation required for Trigger - Record Created or Updated - Complaint Case Record - Number
Description	Trigger - Record Created or Updated - Complaint Case Record - Short Description
Contact	Trigger - Record Created or Updated - Complaint Case Record - Contact
Assignment Group	Complaints Investigation

When you're finished, your action should look similar to this:

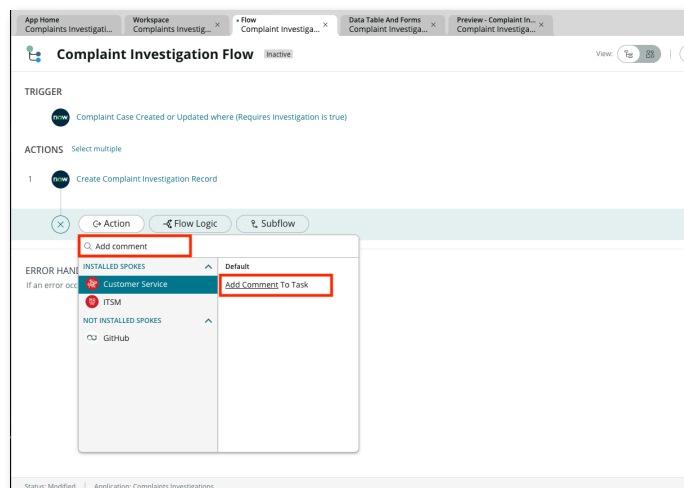


- Next, we want to make sure we indicate in the complaint case record that we have automatically created this investigation. This will ensure that anyone

who looks at the case later will know we've taken action. Let's add a new action by clicking the + Add an Action, Flow Logic, or Subflow button under the action we just created then click Action



13. This time we're looking for the Add Comment To Task action. In the Search field, type Add comment and select the option that appears under the Customer Service spoke



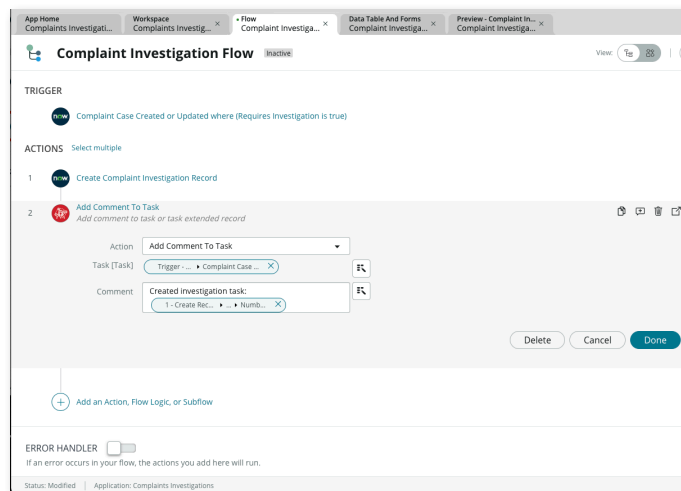
14. Complete the action with the following values then click Done:

**i** NOTE

Values highlighted in bold below indicate we are dot walking to the fields we need in our workflow

Field Name	Value
Task [task]	Trigger - Record Created or Updated - Complaint Case Record
Comment	Created investigation task: 1 - Create Record - Complaint Investigation Record - Number

When you're finished, your action should look similar to this:

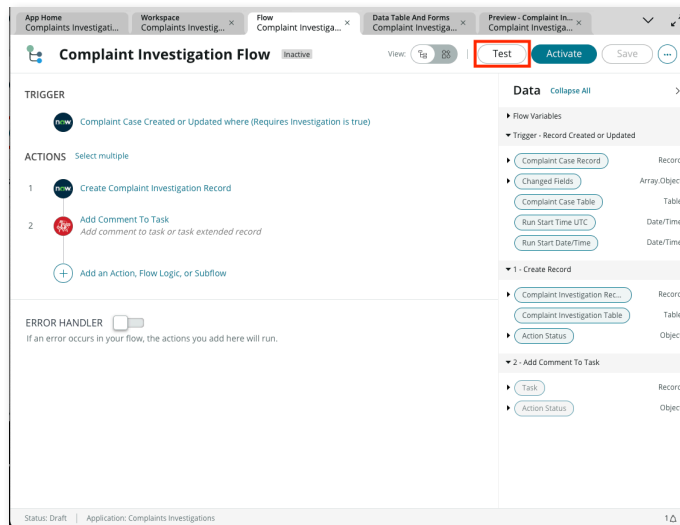


15. Time to test! Save your flow and click the Test button at the top of the screen.

When prompted, choose the complaint case we created earlier in our lab

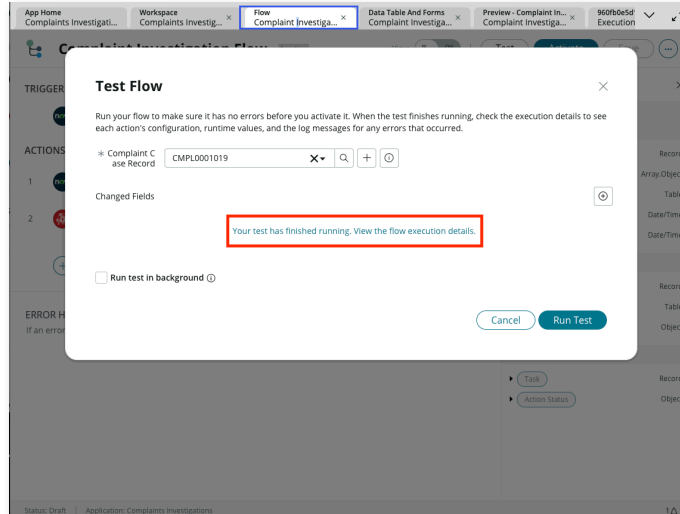
**i** NOTE

Your complaint number may vary from the one reflected in the lab guide.

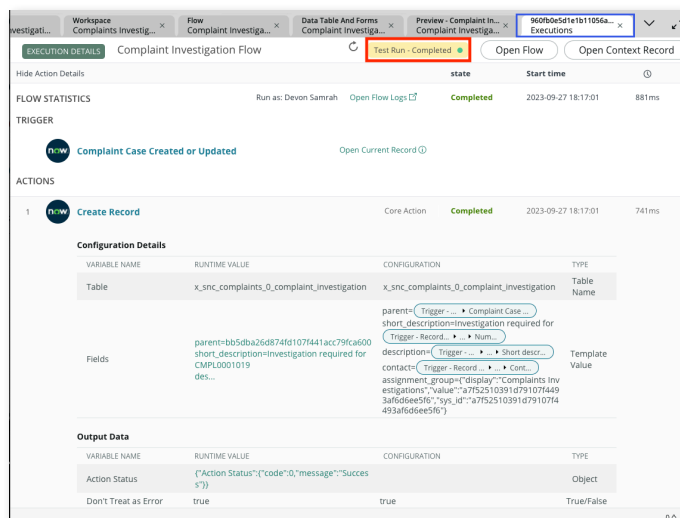


16. To view your test results, click the link on the pop-up

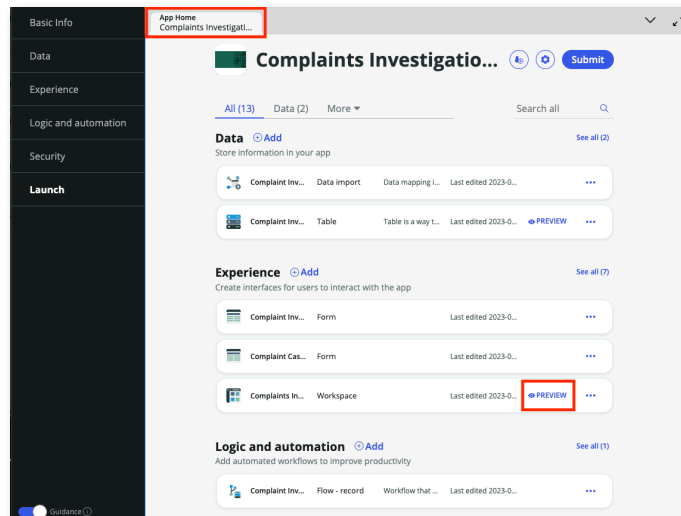




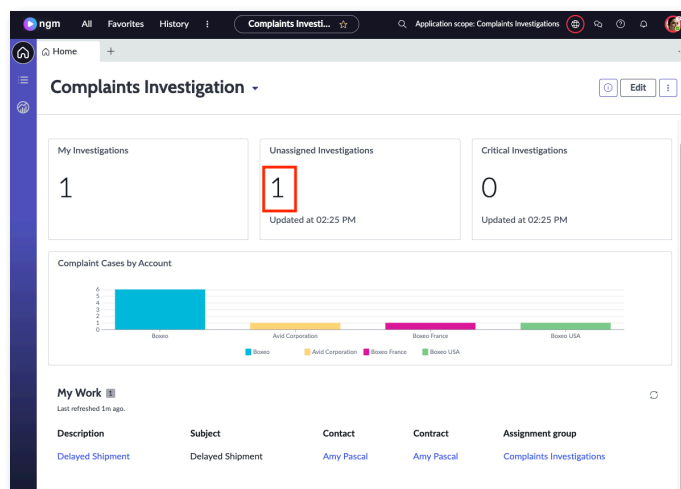
17. Here you will be able to view any errors or resultant records that are created as part of your workflow. If you received errors, go back and take a look at your flow to ensure everything has been completed correctly. If it was successful, you should see **Test Run - Completed** at the top of your screen



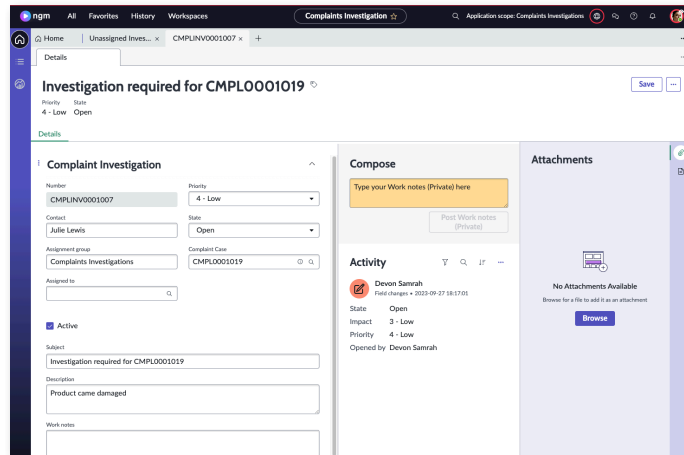
18. Finally, let's see what this looks like for Devon in her new Workspace. Go back to App Home and Preview the Workspace again.



19. Notice there is now an unassigned Investigation for Devon awaiting her on the workspace homepage. Click on the 1 under Unassigned Investigations to view the list of investigations that are unassigned



20. Click on the record that appears in the list to view the newly created investigation record. Your screen should look very much like the screen below!



That's it! You've successfully created automation necessary to create a new investigation when a complaint case requires investigation.

**i** NOTE

Next Steps for Devon:

In the real world, once Devon is happy with her app, she would submit the app for review and approval by the App Engine Administrators.

For the purposes of our lab today, we will not cover those steps, however if you are interested in learning more about how we govern all aspects of application development in ServiceNow, please reach out to your Creator Workflows team.

# Download Lab Guide PDF

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