servicenow®

Brazil Build workflows

Last updated: 10/08/2026

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Some examples and graphics depicted herein are provided for illustration only. No real association or connection to ServiceNow products or services is intended or should be inferred.

ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company and product names may be trademarks of the respective companies with which they are associated.

Please read the ServiceNow Website Terms of Use at www.servicenow.com/terms-of-use.html

Company Headquarters
2225 Lawson Lane
Santa Clara, CA 95054
United States
(408) 501-8550

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

servicenow

Table of Contents

Build workflows **5**

- Workflow Studio 8
  - Explore 9
  - Configure 17
  - Playbooks 18
  - Flows, subflows, and actions .....
  - Decision tables .....
  - Building spokes using Spoke Generator .....
- Intelligent approvals .....
  - Explore .....
  - Configure .....
  - Build intelligent approvals .....
  - Reference .....
- Classic approvals .....
  - Approval engines .....
  - Approval rules .....
  - Approval summarizer formatter .....
  - Approval with e-signature .....
  - Approval status .....
  - Generate an approval using approval rules .....
  - Generate approvals using the approvers related list .....
  - Generate approvals using Workflow flows .....
  - Multiple approvers .....
  - Receive notifications .....
  - Dynamic approval forms .....
  - Scripts and engines execution order .....
- Classic Business rules .....
  - Business rule scopes .....
  - Create a business rule .....
  - Global variables .....
  - Control field values with business rules .....
  - Display business rules .....
  - Task Active State Management .....
  - Installation settings .....
  - Example business rules .....
- System Events .....
  - Exploring system events .....
  - Configuring system events .....
  - Managing system events .....

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

System events reference
Service Creator
Service creator process
Activate Service Creator
Manage a service
Classic Workflow
Getting started with workflows
Workflow editor
Workflow management
Workflow concepts
Workflow administration
Troubleshoot workflows
Use the Workflow Operations Dashboard
Workflow performance timing
Workflow activities

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

servicenow

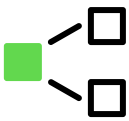
Build workflows

Transform manual tasks and mundane work into digital workflows. Modernize legacy processes with automation. Enable app development at all levels — no-code, low-code, and pro-code — from one platform.

Get started

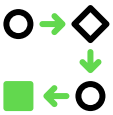
Increase the impact of your cross-enterprise workflows by automating manual processes. Transform business performance with automation. Optimize process efficiency and make work flow seamlessly.

Workflow Studio



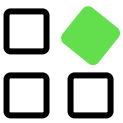
Access workflow applications from a single interface.

Workflow Studio flows



Build multi-step flows from reusable components without having to code.

Workflow Studio playbooks



Author cross-enterprise workflows and create a single, unified process.

Workflow Studio playbook experience

Interact with a business workflow in real time from within Workspace.

Workflow Studio decision tables

Decouple decision logic from code by creating and maintaining decision rules.

Service Creator

Enables a department to offer custom services through the service catalog

Workflow Studio

The ServiceNow® Workflow Studio application provides a single location to access all process automation applications.

Workflow Studio flows

ServiceNow Workflow Studio flows are a ServiceNow AI Platform® feature that enables process owners to automate work. Create end-to-end digital workflows. Automate any process—from simple productivity to complex transformation—in a no-code, environment.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow Studio playbooks

ServiceNow® Workflow Studio playbooks enable process owners to author cross-enterprise workflows and create a single, unified process. Build and manage multiple complex workflows easily with no-code playbooks and the enterprise application development platform.

Workflow Studio decision tables

Workflow Studio decision tables provides an intuitive interface to create and manage decision tables, which store sets of decision rules. Decision tables in Decision Builder embed business logic into a series of if-then decision rules. Decision tables read data from inputs. When all the conditions for a decision rule are met, the decision table returns one or more results. Decision Builder enables developers to decouple decision logic from the code base.

Playbook experience

Visualize complex processes in a simple and familiar task-oriented view built specifically for agents. Agents can use Playbook to update records, upload attachments, and complete tasks across multiple workflow activities.

Service Catalog item designer

The Service Catalog item designer enables non-administrators to create, maintain, and publish catalog items. It uses a structured design and publishing process to ensure consistency of usage.

Service Creator

Service creator enables a department to offer custom services through the service catalog, such as the HR department offering tuition reimbursement for further education.

Classic workflow builder tools

The ServiceNow AI Platform supports these classic workflow builder tools.

Classic Approvals

Classic approvals are records that store the authorization tasks that must be done to approve or reject a request. Approval records are typically created by a Workflow Studio flow or classic workflow. An approval defines both the approval tasks and the users or groups are assigned to approve or reject them. You can replace classic approvals with Workflow Studio flows or classic workflows.

Classic Business Rules

A business rule is a server-side script that runs when a record is displayed, inserted, updated, or deleted, or when a table is queried. You can replace classic business rules with Workflow Studio flows.

Classic Events

Events are special records that the system uses to log when certain conditions occur and to take some kind of action in response to the conditions. You can replace classic events with Workflow Studio flows or Playbooks processes.

Classic Workflow

Workflow is a legacy application that provided a drag-and-drop interface for automating multi-step processes across the platform. Each workflow consists of a sequence of activities, such as generating records, notifying users of pending approvals, or running scripts. The graphical Workflow Editor represents workflows visually as a type of flowchart. It shows activities as boxes labeled with information

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

about that activity and transitions from one activity to the next as lines connecting the boxes. You can replace classic workflows with Workflow Studio flows or Playbooks processes.

Applications and features

Workflow Studio

Integrate workflow authoring, configuring, and monitoring into a single page experience. Consolidate Playbooks, Workflow Studio, Workflow Studio, Integration Hub integrations, and Decision Builder into one design environment.

Workflow Studio playbooks

Playbook enable process owners to author cross-enterprise workflows and create a single, unified process. Build the underlying processes for playbooks that Playbook Experience agents and fulfillers use.

Workflow Studio flows

Flows automate a repeatable multi-step process. When the flow trigger conditions are met, the flow runs a sequence of reusable actions and flow logic to complete the process.

Workflow Studio actions

Actions automate a repeatable task or operation within a flow. Flows run actions by passing them data as inputs. Actions run a sequence of steps to complete the task, and pass data to the flow as outputs.

Workflow Studio decision tables

Workflow Studio decision tables enable developers to decouple decision logic from their code by creating and maintaining decision rules.

Playbook experience

Interact with a business workflow in real time from within Workspace. Agents can use Playbook to update records, upload attachments, and complete tasks across multiple workflow activities.

Service Creator

Service creator enables a department to offer custom services through the service catalog, such as the HR department offering tuition reimbursement for further education.

Classic Approvals

Classic approvals are records that store the authorization tasks that must be done to approve or reject a request. Approval records are typically created by a Workflow Studio flow or classic workflow. An approval defines both the approval tasks and the users or groups are assigned to approve or reject them.

Classic Business Rules

A business rule is a server-side script that runs when a record is displayed, inserted, updated, or deleted, or when a table is queried.

Classic Events

Events are special records that the system uses to log when certain conditions occur and to take some kind of action in response to the conditions.

Classic Workflow

Workflow is a legacy application that provided a drag-and-drop interface for automating multi-step processes across the platform. Each workflow consists of a sequence of activities, such as generating records, notifying users of pending approvals, or running scripts. The graphical Workflow Editor represents workflows

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

visually as a type of flowchart. It shows activities as boxes labeled with information about that activity and transitions from one activity to the next as lines connecting the boxes.

Related ServiceNow applications and features

App Engine Studio

ServiceNow® App Engine Studio (AES) is a development tool for creators of varying skill levels to build applications that meet the immediate needs of your organization.

Zero Copy Connector for ERP

Work with remote tables in the ERP system of record, such as SAP, as well as APIs and ETLs, to create ERP data models to use as data sources for ServiceNow AI Platform applications.

ERP Customization Mining

Identify ERP customization apps that are candidates to migrate to the ServiceNow AI Platform. Use the ServiceNow AI Platform to build applications and features to automate ERP processes and workflows.

Integration Hub

Automate integration tasks using ServiceNow components for ServiceNow® Workflow Studio, or develop custom integrations. A separate subscription is required.

Integration Hub available spokes

Activate spokes to enhance your Workflow Studio experience with integration-specific content. Use prebuilt flows and actions to automate your integrations or create your own integration automation.

MID Server

The Management, Instrumentation, and Discovery (MID) Server is a Java application that runs as a Windows service or UNIX daemon on a server in your local network. The ServiceNow® MID Server enables communication and the movement of data between a ServiceNow instance and external applications, data sources, and services.

Robotic Process Automation (RPA) Hub

Use the ServiceNow® Robotic Process Automation (RPA) Hub to enable end-to-end automation for your organization. With a combination of UI interactions, element-based automations, and APIs that interact between the various business applications, you can emulate user actions and eliminate mundane and repetitive human activities.

Virtual Agent Designer

The Assistant Designer Asset library includes a diagram tool for creating and managing topics, which are blueprints for conversations between a virtual agent and user. You can design topics that help your users resolve common work issues or guide them through self-service tasks.

Workflow Studio

Integrate workflow authoring, configuring, and monitoring into a single page experience. Consolidate playbooks, flows, actions, decision tables, and integrations into one design environment.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Get started

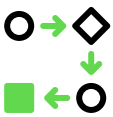
Explore

Learn about Workflow Studio concepts and features

Configure

Configure workflow builders

Flows, subflows, and actions



Use flows to automate repeatable multi-step processes

Playbooks

Use Playbooks to automate, streamline, and standardize complex processes

Flow Assist

Generate flows from text prompts or images using AI

AI in Playbooks

Use AI to create and manage Playbooks

Troubleshoot and get help

- Workflow Automation product on the ServiceNow Community
- Search the Known Error Portal for known error articles
- Contact Customer Service and Support

Exploring Workflow Studio

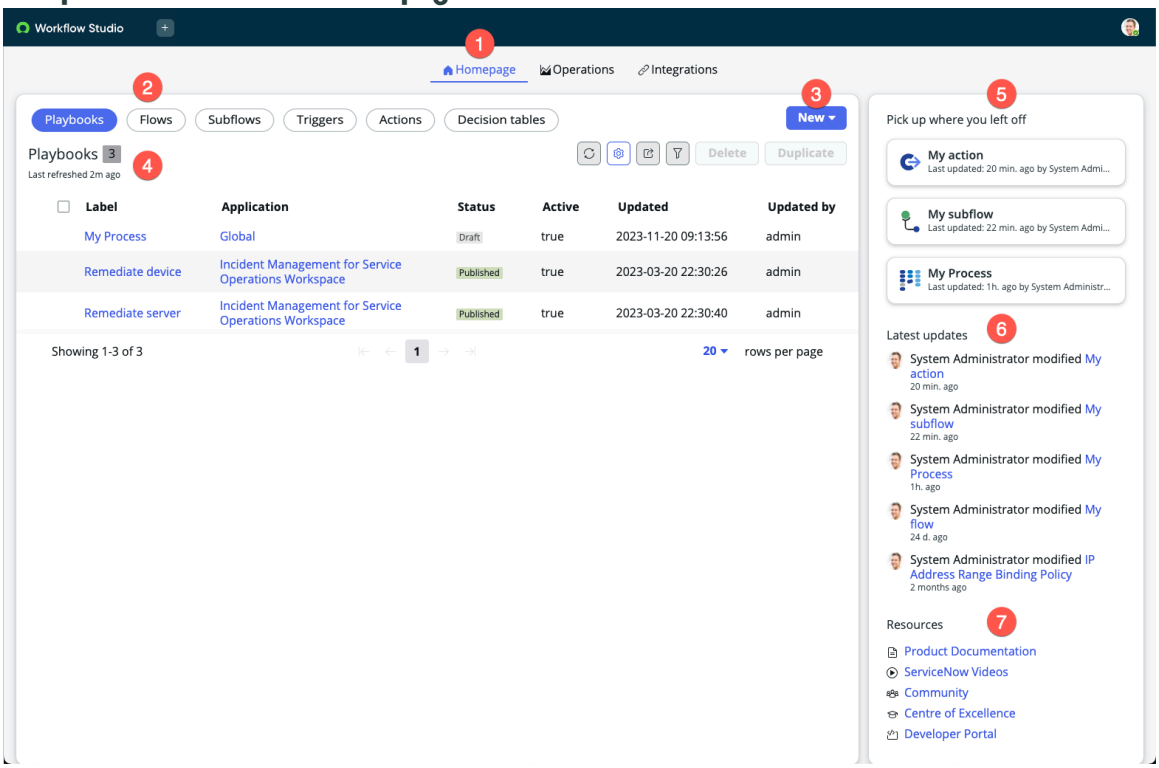
Work with playbooks, flows, subflows, actions, data streams, and decision tables from a single consolidated interface. See operational details of your workflow applications and configure integration connections and credentials.

Homepage

The Workflow Studio homepage displays all the workflow applications available for authoring and editing.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sample Workflow Studio homepage



The Workflow Studio homepage consists of these elements.

1. Homepage

Use the homepage to create and view workflows. You can see a list of workflows by type, a list of workflows you last worked on, a list of recent workflow updates, and a list of information resources.

2. Workflow types

Select a workflow type to see a list of available items you can edit. Options include playbooks, flows, subflows, actions, data stream actions, and decision tables.

3. Create a workflow

Select a workflow component to create. Options include playbooks, flows, subflows, actions, data stream actions, and decision tables.

4. Current workflow list

See the list of workflow items available to edit. Each list shows the total number of workflow items available, a set of list controls, and a separate list row for each workflow item. List options include refresh list, list actions, copy URL, show filter panel, and delete.

5. Pick up where you left off

See the list of workflow items that the current user last worked on. Quickly resume working on a workflow item.

6. Latest updates

See the list of workflow items that have most recently been added or updated. See who worked on an item and when the updates were made.

7. Resources

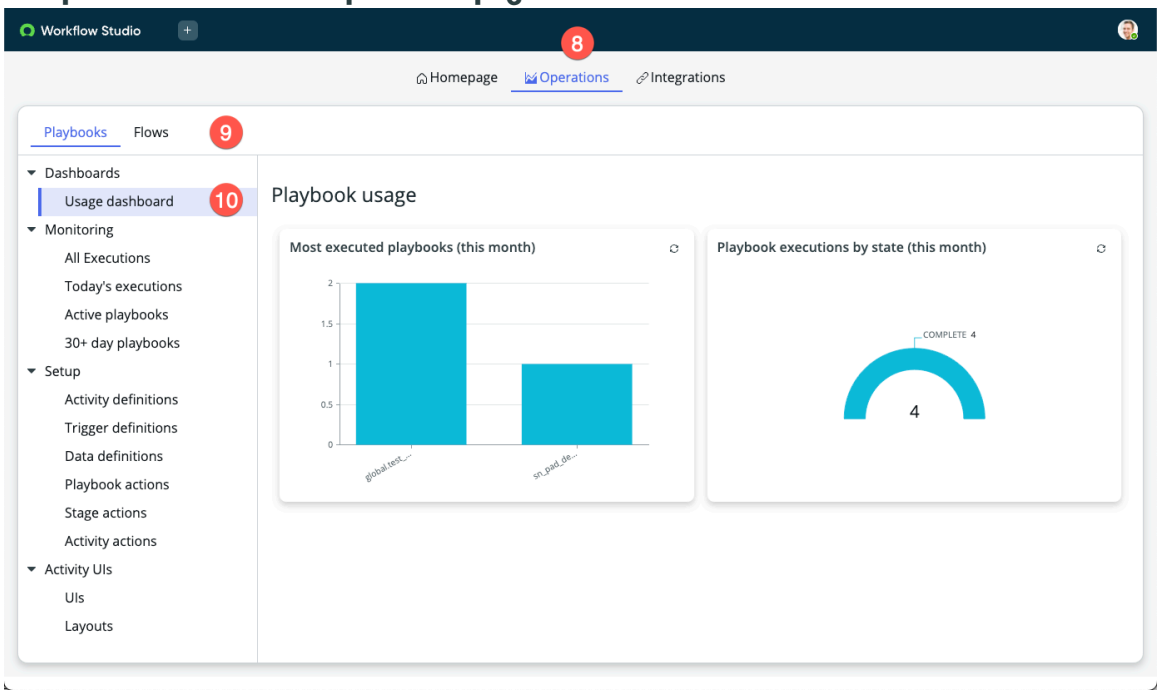
Learn more about Workflow Studio and its related workflow applications. Resources include links to the product documentation, ServiceNow videos, the ServiceNow Community site, the Centre of Excellence site, and the Developer Portal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operations

The Workflow Studio operations page displays a usage dashboard and execution details for the workflow components that are currently running and have completed running.

Sample Workflow Studio operations page



The Workflow Studio operations page consists of these elements.

8. Operations

Use the operations page to see dashboards and execution details by workflow type.

9. Workflow types

Select a workflow type to see available dashboards and execution details. Options include playbooks and flows.

10. Dashboards, Monitoring, and Setup

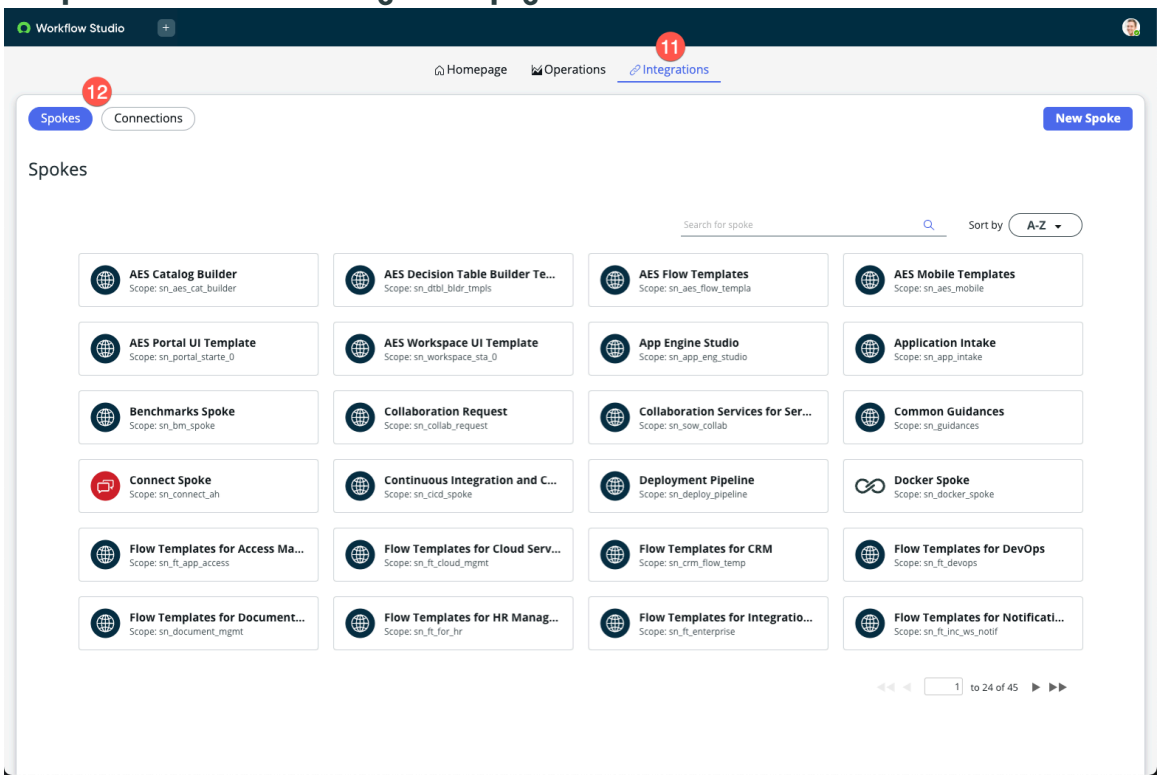
Select a dashboard to see operational charts such as most executed playbooks and playbook executions by state. Only users with the admin role can view an operations dashboard. Select a monitoring option to see execution details. Select a setup option to see settings and properties.

Integrations

The Workflow Studio integrations page displays connection details for Integration Hub spokes. You can use this page to configure inbound and outbound spoke connections.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Sample Workflow Studio integrations page



The Workflow Studio integrations page consists of these elements.

11. Integrations

Use the integrations page to add, configure, or view available connections.

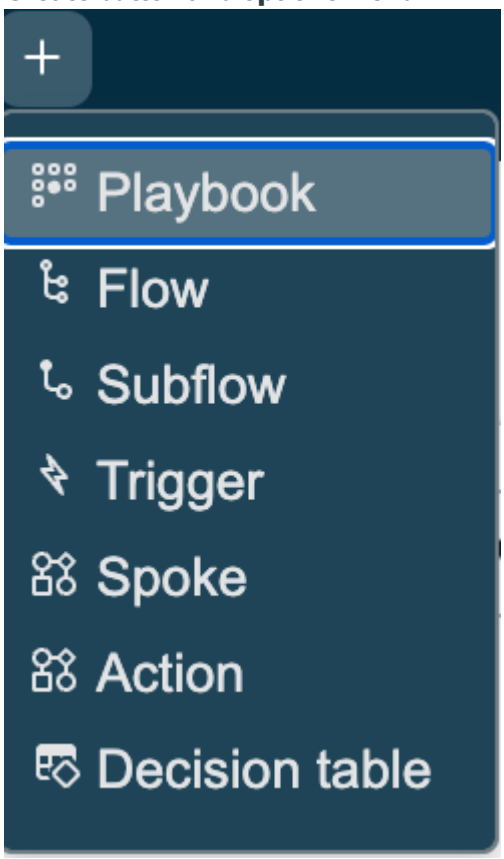
12. Integration types

See a list of available and configured spokes and connections. Configure or create a spoke to integrate data. Use the connection card to configure a connection or review its details.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create button

Create button and options menu



Beginning with the Xanadu release, you can create new workflow items from any Workflow Studio page rather than just the Homepage. Use the Create button on the tab header to display a list of available workflow components.

- Playbook
- Flow
- Subflow
- Action
- Data Stream
- Decision table

Choosing between playbooks and flows

Flows, subflows, and actions are the basic building blocks of a process automation. Playbooks are built on flows, subflows, and actions, and come with a set of out-of-the-box activities driven by subflows that are already built. If you're trying to decide whether your automation should be a playbook rather than just a flow, start by determining if your flow needs user interaction.

- If your process automation requires user interaction, does it need manual user interaction? Examples of manual user interactions are a user reading a knowledge base article, going through a checklist, and gathering feedback.
  - If yes, use a playbook.
  - If no, does your process automation have several user interactions? Examples of user interaction are changing record field values such as changing the incident state or adding task work notes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

        - If yes, consider using a playbook for a better user experience.
        - If no, use a flow. Flows use less data storage in your instance.
- If your process automation doesn't require user interaction, is it a sequence of subflow calls?
    - If yes, is it hard to manage or difficult to view the flow?
        - If yes, consider using a playbook for a better user experience. Stages in playbooks are easier to view and also have additional configuration options.
        - If no, use a flow. Flows use less data storage in your instance.
    - If your process automation does not require any user interaction, keep it as a flow. Flows use less data storage in your instance.

Note: You can also use flows that trigger a playbook just for interactive steps.

If you're trying to determine if a playbook should be a flow instead, start by determining whether your playbook is triggered 10s, 100s, or even 1000s of times per second.

- If your playbook is triggered 10s, 100s, or 1000s of times per second, are there any user interactions?
    - If yes, do the user interactions happen during every single run?
        - If yes, use a playbook. Playbooks offer visibility into where you're at in a process, particularly business processes with manual user steps.
        - If no, create a flow that triggers a playbook for the user interactions.
    - If no, use a flow. Flows use less data storage in your instance.
- If your playbook is not triggered very often, keep it as a playbook. Playbooks offer visibility into where you're at in a process, particularly business processes with manual user steps.

You can reference decision tables in flows, subflows, actions, and playbooks. Data streams are not used in flows, subflows, actions, playbooks, or decision tables. To learn more about data streams, see Data Stream actions and pagination.

Differences from previous releases

Workflow Studio combines playbooks, flows, subflows, actions, decision tables, and Integration Hub integrations into a single builder application. Each of the prior workflow applications retain their functionality and their user interface to create and edit workflow objects. Workflow Studio introduces these changes.

Access Workflow Studio from duplicate menu items

Workflow Studio uses the existing menu items for the separate workflow builder applications to open the corresponding workflow object type. For example, selecting the Process Automation Designer menu item opens the playbooks list from the Workflow Studio homepage.

Configure integration connections

Workflow Studio enables you to configure integrations in the same user interface as you build integration components. For example, you can create a data stream action and also define its connection details.

Create workflow components from any page

Beginning with the Xanadu release, Workflow Studio allows you to create a workflow component from any page rather than just the Homepage.

Display each workflow type in a separate tab

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Workflow Studio displays each workflow object type in its own tab. For example, playbooks open in a playbook tab and flows open in a flow tab.

Edit different workflow types simultaneously

Workflow Studio combines all workflow object types into a single user interface. You can work on related workflow objects simultaneously rather than switch between separate workflow builder applications. For example you can create a flow that includes the Make a decision flow logic and also create the decision table used by that decision.

Set application specific settings from the existing property pages

Workflow Studio relies on the existing system properties pages to add and configure setting for each workflow application. For example, open the flows properties page to configure the behavior of flows, subflows, and actions.

View all available execution details

Workflow Studio contains execution details for all workflow object types. You no longer have to switch between applications to see execution details for a particular object type.

Getting started with process automation

Learn how process automation applications can help you use the ServiceNow AI Platform® to transform your manual business processes into digitized, automated workflows.

ServiceNow process automation applications help you digitize, visualize, and manage the cross-enterprise workflows for your business. Digitizing your business processes with process automation applications gives you these benefits:

- Management of process compliance
- Ownership of continual process improvement
- Collaboration across divisions and departments
- Visibility into process outcomes

Process automation applications

The ServiceNow process automation applications that you can use to digitize your business processes into automated workflows on the ServiceNow AI Platform include:

Flows

Flows enables process owners to automate approvals, tasks, notifications, and record operations without having to code.

Playbooks

Playbook enable process owners to author cross-enterprise workflows and create a single, unified process. Build the underlying processes for playbooks that Playbook Experience agents and fulfillers use.

Roles involved in process automation

Depending on the process automation application that you use, you may need to coordinate with other teams or individuals to ensure that your automated processes run smoothly. One possible way in which you could organize the roles for process automation applications is:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- A developer uses Workflow Studio to work on flows, actions, and activity definitions to automate individual pieces of a business process.
- A playbook owner uses Playbooks to organize the pieces of the business process into a digitized, cross-enterprise workflow.
- A Playbook Experience administrator configures the appropriate views of the business process for the right system users in playbooks.
- A Playbook Experience agent, the end user in this case, works on and manages the individual tasks of the business process in playbooks on the ServiceNow AI Platform.

User roles

Many different user roles are involved in creating effective digitized, automated processes on the ServiceNow AI Platform.

Learn more about process automation

To find out more about how you can use Workflow Studio and Playbooks to digitize your business processes, try checking out these resources:

- Flow Designer fundamentals course
- Exploring flows
- Building your first playbook

When to use flows and Playbook

Use these general guidelines to determine when to create a flow or a playbook.

When to use flows

Flows, subflows, and actions are the basic building blocks of process automation. Flows run when their trigger conditions are met, and each flow in turn runs a sequence of actions, flow logic, and subflows. The actions, flow logic, and subflows within a flow are what create and update data.

A flow is a good fit for process automations that met these criteria.

Expect few to no manual user interactions

As long as a flow has the input data it needs, it can run to completion without any user interaction. Some flow logic and actions require users to make record changes, but a flow can automatically pause until its wait conditions are met. Process

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

automations that depend on user interactions such as reading a knowledge base article, going through a checklist, and gathering feedback are harder to manage with flows. Flows don't directly provide any UI elements for users to interact with. Flows depend on users knowing how to find an existing UI and making any needed changes. For example, a record-based flow depends on a user making a change in a specific record such as a case or an incident.

Expect to run at high volumes

An instance can run hundreds to thousands of flows per second. With flow reporting being disabled by default, an instance can run a high volume of flows before it sees any performance impact. If you expect to run a process automation at high volumes, a flow is a good fit over a playbook because it requires less overhead and system resources.

Expect to run few to no subflows

The more subflows a flow calls, the more difficult it becomes to manage from the flows interface. While you can use conditional flow logic or a decision table to choose a subflow to run, playbooks offer a better user experience for running a sequence of subflows.

When to use Playbook

Playbook are built on activities, which use prebuilt flows, subflows, and actions as their building blocks.

A playbook is a good fit for process automations that met these criteria.

Expect several manual user interactions

Playbooks provide UI elements for users to interact with. The playbook experience guides users to make any changes required to advance the playbook.

Expect to run at low volumes

Playbooks require more system resources to run because they generate UI elements and store more execution details.

Expect to run many subflows

Playbooks offer a better user experience for running a sequence of subflows.

Configuring Workflow Studio

Enable access to Workflow Studio and allow management of workflow applications.

The Workflow Studio application is a ServiceNow AI Platform feature that is active by default, and that is also available for installation and update from the ServiceNow Store.

Each workflow application within Workflow Studio has its own installation and subscription requirements.

Playbooks

Playbooks are included with Workflow Studio, which is a ServiceNow AI Platform feature that is active by default, and that is available for installation and update from the ServiceNow Store. However, you can only trigger playbooks off of platform and application tables that you have access to. For activation information, see Activate Playbooks.

Flows and subflows

Flows and subflows are included with Workflow Studio, which is a ServiceNow AI Platform feature that is active by default, and that is available for installation and update from the ServiceNow Store.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Actions

Actions are included with Workflow Studio, which is a ServiceNow AI Platform feature that is active by default, and that is available for installation and update from the ServiceNow Store.

Data stream actions

Data stream actions require a separate subscription to Integration Hub. For activation information, see Request Integration Hub.

Decision Builder

Decision Builder is a ServiceNow AI Platform feature that is available for installation and update from the ServiceNow Store. For installation and update information, see Configuring decision tables.

Update to the latest version of Workflow Studio

Workflow Studio is automatically installed on your instance. However, Workflow Studio is a ServiceNow Store application, so to get the latest features, you must update your version manually to the most recent version.

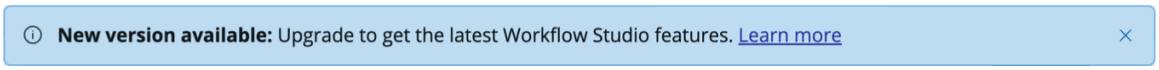
Before you begin

Role required: admin

About this task

Workflow Studio displays an information banner when a new version is available.

New version available information banner



Updating Workflow Studio automatically updates all of its application dependencies such as Flow Designer, Playbook, and Decision Builder.

You can also find and update each individual Workflow Studio application dependency from the ServiceNow® Store or the list of plugins.

Procedure

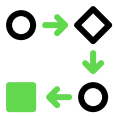
1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Search for the Workflow Studio application using the search bar.
   Check the **Updates** and **Installed** tabs to locate Workflow Studio (app id: sn_workflow_studio).
3. Select **Workflow Studio**.
4. Using the version list on the right, select the latest version of Workflow Studio.
5. Select **Update**.

Workflow Studio playbooks

Workflow Studio playbooks streamline and standardize complex processes. Automate tasks, ensure consistency, and enhance operational efficiency across your organization with intuitive, low-code workflows.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Get started

Explore Learn about playbooks	**Configure** Learn how to configure playbooks	**Build a playbook**  Learn how to build a playbook.
Design Playbook Experience Learn how to design and customize Playbook Experience for end users	**Run a playbook** Learn about the Playbook Experience for end users	**Reference** Get referential information about Playbooks

Exploring Playbook

Playbook enable process owners to author cross-enterprise workflows and create a single, unified process. Build the underlying processes for playbooks that Playbook Experience agents and fulfillers use.

Playbooks benefits

Workflow Studio Playbooks enables you, as a business playbook owner, to organize Workflow Studio content into unified and digitized cross-enterprise processes. With Playbooks, you gain these benefits:

- Connect multiple flows and actions into an end-to-end business workflow.
- Reuse existing Workflow Studio flows, subflows, or actions to automate playbook activities.
- Organize playbook activities in a digitized task board or diagram interface.
- Guide agents and fulfillers through complicated playbooks from start to finish, improving customer experience and task resolution. Build your playbooks in Workflow Studio, and then design and embed your Playbook Experience in legacy workspace, UI Builder, ServiceNow Mobile Platform, Service Portal, and more.
- Consolidate separate business processes across the organization.
- Define a consistent record life cycle from creation to completion.
- Pass data between the activities and stages of a business process.
- Specify the conditions and the order in which activities and stages run.
- Visualize and manage the activities and stages of your process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Creating a well-designed playbook

The automated business processes that you design guide your end users and help them focus on the tasks and information that matter to them. A well-designed playbook can do these things:

- Start up, or trigger, automatically for the types of records that your end users care about
- Reuse activities from existing Workflow Studio content
- Has well-defined stages that end users can follow for a record
- Clearly show the next steps that end users must take to move through a record's life cycle

Playbooks content

Playbooks has these components:

Playbooks

A playbook is a ServiceNow AI Platform® representation of a cross-enterprise business process for your organization. A playbook owner is responsible for creating and maintaining a playbook.

Triggers

A trigger specifies when to start running your playbook.

Stages

A stage is a grouped sequence of activities in a playbook. A playbook owner creates a stage to specify a logical grouping of activities. A stage in your overall business process.

Activities

An activity defines the Workflow Studio content that powers the playbook's automation. An activity can also specify the user-facing experience that the playbook produces when it runs.

For more information about how to use and navigate the Playbooks user interface, see Playbook builder.

Playbook Experience

Guide agents and fulfillers through complicated playbooks from start to finish, improving customer experience and task resolution. Build your playbooks in Workflow Studio, and then design and embed your Playbook Experience in legacy workspace, UI Builder, ServiceNow Mobile Platform, Service Portal, and more.

To learn about designing Playbook Experience, see Designing Playbook Experience.

Getting started

Before you get started with Playbooks, Familiarize yourself with any features that your business uses to automate operations on the ServiceNow AI Platform, such as flows, subflows, and actions.

If you're a playbook owner who wants to learn the basics of digitizing your business process, check out the following resources:

- Get started with ServiceNow® Process Automation
- Get started with Playbooks

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Design your first automated process
- View your process executions

If you're a ServiceNow Process Automation administrator who wants to set up and customize Playbooks, check out the following resources:

- Triggers
- Activity definitions

Playbook across ServiceNow AI Platform®

Playbook capabilities are available in other ServiceNow® products and for specific industries. You get the Playbook content when you subscribe to the ServiceNow AI Platform®.

To learn about activating Playbook other applications, see Activate Playbooks.

Integration	Content available
App Engine Studio	Build playbooks from App Engine Studio.
Creator Studio	Create basic request and fulfillment apps without code.
Configure Playbooks for Customer Service Management	Create playbooks for Customer Service Management.
Field Service Management	Create playbooks for Field Service Management.
HR Service Delivery Playbook	Create playbooks for HR services.
Software Asset Management Guided Experiences	Create playbooks for Software Asset Management.
Healthcare and Life Sciences	Create playbooks for Healthcare and Life Science processes.
Playbooks for Financial Services Operations applications	Create playbooks for Financial Services Operations.
Playbooks for Public Sector Digital Services	Create playbooks for Public Sector Digital Services.
Run actions to resolve alert issues in Service Operations Workspace for ITOM	Create playbooks for IT Operations Management.
Account onboarding	Create playbooks for Account Lifecycle Events.
Onboard Jira to DevOps Change Velocity — Workspace	Create playbooks for IT Service Management.
Security Incident Response playbooks	Create playbooks for Security Operations.
Working with SPO playbooks in the Source-to-Pay Workspace	Create playbooks for Procurement Service Management.
Complete publishing checklist and request policy approval	Create playbooks for Governance, Risk, and Compliance processes.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook builder

Playbooks is a component in Workflow Studio. Workflow Studio gives you a streamlined way to author, configure, and monitor playbooks, flows, subflows, actions, and decision tables in one place.

Workflow Studio landing page

You can view the Workflow Studio landing page by navigating to **Process Automation** > **Workflow Studio**. The landing page opens to Playbooks by default, but you can easily navigate to flows, subflows, actions, and decision tables. For more information on Workflow Studio, see Workflow Studio.

Playbooks builder

The builder for Playbooks consists of the main header, design space, and side panel.

Main header

The main header displays information about the playbook that you're currently designing. In the main header, you can:

- See the status and activation state of your playbook.
- Toggle between Diagram and Board view.
- Undo or redo your actions.
- See and navigate to your errors via the error tray.
- Turn Optional activities on or off.
- Test and activate your playbook so that it runs as expected when triggered. You can also preview the Playbook Experience during testing. For more information, see Playbook statuses and activation states.
- In the **More actions** menu, you can also deactivate or duplicate your playbook.
- Also in the **More actions** menu, access the properties of your playbook. You can add or edit the name or description for your playbook, enable playbooks to restart, and edit the behavior of your trigger.

Design space

Build your Playbook in either Diagram or Board view. You can perform most of the same functions in either view.

> **Note:** Decision activities are not available in Board view, and Optional activities are not available in Diagram view.

Organize activities into stages to design your playbook.

- An activity represents one step within your overall business process. An activity can automate operations on the ServiceNow AI Platform, such as creating or updating records, displaying record information, and running automated actions in the background.
- Organize a set of activities into stages within your business process.

For more information, see Stages and activities.

Side panel

The side panel lets you configure your activities, and stages. In the side panel, you can:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Add or edit the name and description for your stage or activity.
- Define the start rule for your stage or activity.
- Define what your activity or stage does when restarted.
- Add or edit the inputs for your activity.
- Define additional properties for how your activity renders during runtime.
- Define if and how an AI agent performs the activity.

For more information on creating a playbook, see Building your first playbook.

Playbook builder components

Playbooks in Workflow Studio consists of these components:

Playbooks

A playbook is where a playbook owner configures and organizes multiple instances of Workflow Studio content into a coherent business process. A playbook consists of a trigger and a sequence of stages, which are made up of a sequence of activities.

Trigger definitions

A trigger definition specifies the conditions that must be met to run a playbook. A user with the admin, playbook.admin, or pd_trigger_author role typically creates and configures a trigger definition that playbook authors can use as a template. A trigger definition specifies the record operation and table conditions that must be met to start running a playbook. A playbook owner typically selects a trigger template when creating a playbook.

Trigger instances

A trigger instance is produced when you select a trigger template. The trigger instance stores the conditions that a record must meet to start running the playbook.

Stages

A stage is a logical grouping of activities in a playbook. A playbook owner creates a stage to group activities and specify the start rule for when the stage should start running. A stage in your overall business process.

Activity definitions

An activity definition maps subflow and action inputs and outputs to an activity instance. An activity definition contains:

- The automation plan to map the triggering input record data to action or subflow inputs
- The activity experience to map action or subflow outputs to a user-facing view of the playbook

A user with the admin, playbook.admin, or pd_content_author roles typically specifies the automation plan and activity experience when creating an activity definition.

Activity instances

An activity instance is produced when you add an activity to a playbook. The activity instance stores the automation plan data mappings from the activity definition. You can change these data mappings when the default values do not fit your playbook. The playbook can specify the start rules for when the activity should start running.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Start rules

A start rule specifies when a stage or an activity starts running. A playbook owner can use start rules to specify what parts of a playbook run simultaneously and what parts run serially.

Playbook Experience

Understand how Playbook work in the ServiceNow AI Platform® to automate cross-functional processes and consolidate them into task-oriented views for your end users.

All > **Process Automation** > **Workflow Studio** > **Playbooks** is the design environment where playbook owners build playbooks. Meanwhile, the runtime experience is where end users, such as playbook agents, follow the playbook to complete a business process. To learn more about the Playbook designer, see Playbook builder.

Runtime experience

Workflow Studio produces these runtime components for Playbooks:

Process executions

A process execution stores the details of running a playbook in a context record. You can use a process execution to troubleshoot and verify that playbooks run as expected.

Activity executions

An activity execution stores the details of running an activity instance in a context record. You can use an activity execution to troubleshoot and verify that playbooks run as expected.

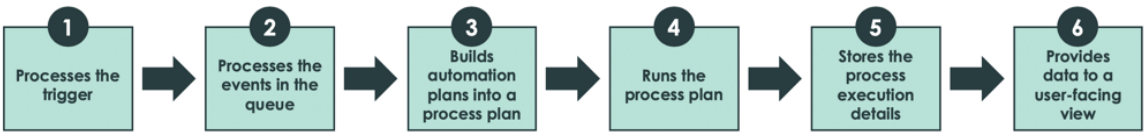
Playbook runtime

Playbook runtime is when a playbook runs for an agent or fulfiller. A playbook runs for agents only after Playbook Experience administrators configure how and where the playbook appears.

During runtime for a playbook, your instance:

1. Evaluates any conditions specified in the trigger definition and processes the trigger.
2. Processes the Events and starts running the playbook in the background.
3. Builds the automation plans from each activity into an entire process plan.
4. Runs the process plan for your playbook.
5. Stores the process execution information in the Process Execution [sys_pd_context] table.
6. Provides data for the running playbook view that agents and fulfillers experience.

Playbook processing



Your instance processes a playbook during runtime by evaluating trigger conditions, processing the event in the queue, building and running a process plan, storing process execution details, and providing data for the Playbook Experience.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Data security and HTML sanitization

Playbooks protects against cross-site scripting and code injection by evaluating all string data for HTML markup. The system only preserves HTML markup that is present in its inclusion list. All other HTML markup is removed from string data.

The inclusion list supports these HTML elements and attributes, which cannot be modified.

HTML inclusion list

HTML element	Included Attributes
a	class, href, target, title
abbr	class, title
address	class
area	alt, class, coords, href, shape
article	class
aside	class
audio	autoplay, class, controls, loop, preload, src
b	class
bdi	class, dir
bdo	class, dir
big	class
blockquote	cite, class
br	class
caption	class
center	class
cite	class
code	class
col	align, class, span, valign, width
colgroup	align, class, span, valign, width
dd	class
del	class, datetime
details	class, open
div	class
dl	class
dt	class
em	class
emp	class
font	class, color, face, size
footer	class

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HTML inclusion list (continued)

HTML element	Included Attributes
h1	class
h2	class
h3	class
h4	class
h5	class
h6	class
header	class
hr	class
html	
i	class
img	alt, class, height, src, title, width
input	aria-label, class, type, value
ins	class, datetime
li	class
mark	class
nav	class
ol	class
p	class
pre	class
s	class
section	class
small	class
span	class
sub	class
sup	class
svg	class
strong	class
style	
table	align, border, class, valign, width
tag	class
tbody	align, class, valign
td	align, class, colspan, rowspan, valign, width
tfoot	align, class, valign
th	align, class, colspan, rowspan, valign, width

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

HTML inclusion list (continued)

HTML element	Included Attributes
thead	align, class, valign
tr	align, class, rowspan, valign
tt	class
u	class
ul	class
video	autoplay, class, controls, height, loop, preload, src, width

AI capabilities in Playbooks

Explore the AI-powered capabilities in Playbook, from generating and recommending playbooks to enabling autonomous, agentic execution.

The generative AI and agentic AI capabilities help you build, discover, and run playbooks more efficiently.

Capability	Description	Documentation
Playbook generation	Generate a complete playbook automatically using a natural language prompt. Now Assist creates the playbook structure, stages, and activities based on text prompt or image.	Playbook generation from text prompt or image
Playbook recommendation	Get AI-generated recommendations for placeholder activities. The system generates recommendations based on an activity's name and description.	Playbook recommendations for placeholder activity
Playbook summarization	Use AI-generated overviews of a playbook's stages, activities, triggers, and inputs to understand its purpose and flow without going into the details of what is being done at activity and stage level.	Playbook summarization
Agentic Playbooks	Enable AI agents to autonomously execute playbook actions and make decisions at runtime, reducing manual intervention for complex, multi-step processes.	Agentic Playbooks

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Domain separation in Playbooks

Data separation is supported for Playbooks. The domain value of the triggering input record determines the domain context. Domain separation enables you to separate data, processes, and administrative tasks into logical groupings called domains. You can control several aspects of this separation, including which users can see and access data.

Support level: Basic

- Business logic: Ensure that data goes into the proper domain for the application's service provider use cases.
- The application supports domain separation at run time. The domain separation includes separation from the user interface, cache keys, reporting, rollups, and aggregations.
- The owner of the instance must set up the application to function across multiple tenants.

Sample use case: When a service provider (SP) uses chat to respond to a tenant-customer's message, the customer must be able to see the SP's response.

For more information on support levels, see Application support for domain separation.

How domain separation works for Playbooks

The system domain separates Playbooks content according to these rules:

Playbooks content runs from the domain it is triggered from

Activities and Playbooks run from the domain of the record or user who initiates them. For example, when a user from the child domain ACME triggers a playbook belonging to the parent domain TOP, the playbook runs in the context of the child domain ACME.

Workflow Studio content runs in the domain of the calling Playbooks activity

Whenever an activity definition calls an action or flow, the system runs the Workflow Studio content in the same domain context as the triggering Playbooks content. If the Workflow Studio content has a matching domain-specific process override, then the system runs the override version instead. While Playbooks does not support process overrides, it uses any process overrides defined within Workflow Studio.

Note:

- A process override refers to a type of override in domain separation.
- Service providers (SPs) can use domain separation, to logically separate data, processes, and administrative tasks into defined groups.

Playbooks configuration files are visible to all domain users

Playbooks configuration files are not domain separated. Any user with the appropriate roles can view all playbooks, trigger definitions, and activity definitions.

Related topics

Domain separation for service providers

Configuring Playbooks

Set up and monitor Playbooks and Playbook Experience.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configuration Overview

- You don't need to activate the core Workflow Studio Playbooks feature because it is already part of the ServiceNow AI Platform, but many features are only available with application updates from the ServiceNow Store.

  Download the latest updates for Playbooks from the ServiceNow Store. To get started more quickly, we recommend you download the Process Automation Demo Experience, Process Automation Content, and Playbook Experience applications as well.

- Configure Playbooks user access and properties.
- Configure accessibility preferences to make the Playbooks authoring experience more accessible.

Activate Playbooks

Activate the Workflow Studio application to create flows, playbooks, and more for any of your use cases.

Playbooks are included with Workflow Studio, which is a ServiceNow AI Platform feature that is active by default, and that is available for installation and update from the ServiceNow Store. However, you can only trigger playbooks off of platform and application tables that you have access to. These can be:

- Application tables
- Custom tables that extend the application tables
- Custom tables authorized by the application subscription

Each application subscription entitles you to create playbooks for its associated tables. Purchase subscriptions to access any additional tables that you want to trigger your playbooks from. If you already have a subscription to your application but you still can't create playbooks for your application's tables, enable the appropriate plugin.

Note: The plugins you enable determine which tables are available for you to create playbooks.

See the following sections to learn how to activate Workflow Studio Playbooks for your application.

Activate Playbooks for App Engine

Activate Playbooks on your instance to create playbooks in App Engine.

Before you begin

Role required: admin

About this task

In order to create playbooks in App Engine, you must purchase a subscription to the ServiceNow AI Platform App Engine.

To purchase this subscription, contact your ServiceNow account manager. Your account manager can arrange to have the plugin activated on your organization's production and subproduction instances, generally within a few days.

If you don't have an account manager, decide to delay activation after purchase, or want to evaluate the product on a subproduction instance without charge, follow these steps to enable the **Process Automation Designer for App Engine [com.glide.pad.license]** plugin:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Select **Request plugin** to open the **Activate Plugin** form on Now Support.
3. On the **Activate Plugin** form, provide the following information.

Activate Plugin form

Field	Description
What is your target instance	Select the instance that you want to activate the plugin on.
Which plugin would you like to activate	Select the name of the plugin to activate. **Note:** If the system doesn't list the plugin you want or if you're activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	Select the date and time to activate the plugin.

Example

For example, see the following form to activate the Event Management plugin on an instance named SNC Instance.

4. Select **Submit**.
   After the maintenance window, the system installs the plugin on your instance. To confirm the installation, go to the Installed tab in the Application Manager.

Result

You can create triggers in Playbooks for custom tables that you create. Enabling the **Process Automation Designer for App Engine [com.glide.pad.license]** plugin lets you create playbooks for these tables and their extensions:

- Affected CIs [cmdb_outage_ci_mtom]
- Agent Capacity [awa_agent_capacity]
- Agent channel availability [awa_agent_channel_availability]
- Agent Presence [awa_agent_presence]
- Announcement [announcement]
- Assessment Category Result [asmt_category_result]
- Assessment Instance [asmt_assessment_instance]
- Assessment Metric [asmt_metric]
- Assessment Metric Template [asmt_template]
- Assessment Metric Type [asmt_metric_type]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Assessment Metric Type Group [asmt_metric_type_group]
- Assessment Net Promoter Score [asmt_nps_result]
- Assessment Template Definition [asmt_template_definition]
- Assignment Eligibility [awa_eligibility_pool]
- Assignment Rule [awa_assignment_rule]
- Audit [cert_audit]
- Audit Result [cert_audit_result]
- AWA Agent Presence and Capacity [awa_agent_presence_capacity]
- AWA Document Size [awa_document_size]
- Base Configuration Item [cmdb]
- Building [cmn_building]
- Business Calendar [business_calendar]
- Certification Template [cert_template]
- CI Relation Filter [cmdb_rel_filter]
- CI Relationship [cmdb_rel_ci]
- CI Relationship Rollup [cmdb_rel_rollup]
- CI Relationship Type [cmdb_rel_type]
- CI/User Relationship Type [cmdb_rel_user_type]
- CIs Affected [task_ci]
- CMDB Group [cmdb_group]
- CMDB Group Event Queue [cmdb_group_event_queue]
- CMDB Group Type [cmdb_group_type]
- CMDB Health Configuration [cmdb_health_config]
- CMDB Health Metric [cmdb_health_metric]
- CMDB Health Result [cmdb_health_result]
- CMDB Health Scorecard [cmdb_health_scorecard]
- Company [core_company]
- Connection & Credential Aliases [sys_alias]
- Connection & Credential Templates [sys_alias_templates]
- Cost Center [cmn_cost_center]
- Country [core_country]
- Department [cmn_department]
- Direct Relationships [cmdb_related]
- [dms_document]
- Draft Document [draft_document]
- Follow On Task [cert_follow_on_task]
- Group [sys_user_group]
- Group Member [sys_user_grmember]
- Group Queue Priority [awa_group_queue_priority]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Group Relationship [cmdb_rel_group]
- Group Role [sys_group_has_role]
- Group Skill [sys_group_has_skill]
- Guided Setup Task [gsw_task]
- Holiday [sys_holiday]
- Impacted CIs [task_cmdb_ci_service]
- Inbox Layout [awa_inbox_layout]
- Interaction [interaction]
- IP Address Pool [cmdb_ip_address_pool]
- IP Address Range [cmdb_ip_address_range]
- IP Address to DNS Name [cmdb_ip_address_dns_name]
- IP Service [cmdb_ip_service]
- KB Submission [kb_submission]
- Knowledge [kb_knowledge]
- Knowledge Base [kb_knowledge_base]
- Knowledge Category [kb_category]
- Knowledge Feedback [kb_feedback]
- Knowledge Feedback Task [kb_feedback_task]
- Knowledge Use [kb_use]
- Location [cmn_location]
- Metric [metric_instance]
- Model Category [cmdb_model_category]
- Offer Details [awa_offer_details]
- OS User [cmdb_os_user]
- Outage [cmdb_ci_outage]
- Page [sp_page]
- Peer Relationships [cmdb_peer]
- People Relationship [cmdb_rel_person]
- Presence State [awa_presence_state]
- Private Task [vtb_task]
- Product Model [cmdb_model]
- Queue [awa_queue]
- Related Entry [cmdb_related_entry]
- Report [sys_report]
- Role [sys_user_role]
- Roster [cmn_rota_roster]
- Rotation Escalation [cmn_rota_escalation]
- Scheduled Suite Run [sys_atf_schedule_run]
- Service [cmdb_ip_service_ci]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Service Portal [sp_portal]
- Shift [cmn_rota]
- Shift Escalation Set [cmn_rota_escalation_set]
- Shift Escalation Step Definition [cmn_rota_esc_step_def]
- Skill Category [cmn_skill_category]
- Skill Level [cmn_skill_level]
- Skill Level Type [cmn_skill_level_type]
- Subscribers [cmdb_subscriber]
- Template [sys_template]
- Test [sys_atf_test]
- Test Results [sys_atf_test_result]
- Test Suite [sys_atf_test_suite]
- Test Suite Result [sys_atf_test_suite_result]
- Test Suite Test [sys_atf_test_suite_test]
- Test Template [sys_atf_test_template]
- Theme [sp_theme]
- Ticket [ticket]
- [universal_request]
- User [sys_user]
- User Skill [sys_user_has_skill]
- Vendor Type [vendor_type]
- Work Item [awa_work_item]
- Work Item Rejection [awa_work_item_rejection]
- Work Item Sizing [awa_work_item_sizing]
- Work Item Sort Order [awa_queue_item_sorting]

Note: If you create a custom table such as My Table [x_my_table], you can create playbooks that trigger from it. However, you cannot create a playbook that triggers from a table belonging to another Process Automation Designer plugin.

Activate Playbooks for Customer Service Management (CSM)

Activate Workflow Studio Playbooks on your instance so that you can create Playbooks triggered by CSM tables.

Before you begin

Role required: admin

About this task

In order to create Playbooks in Workflow Studio that are triggered by CSM tables and custom tables that extend from them, you need to purchase a subscription to CSM.

To purchase this subscription, contact your ServiceNow account manager. Your account manager can arrange to have the plugin activated on your organization's production and subproduction instances, generally within a few days.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you don't have an account manager, decide to delay activation after purchase, or want to evaluate the product on a subproduction instance without charge, follow these steps to enable the **Playbooks for Customer Service Management [com.sn_csm_playbook]** plugin:

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Select **Request plugin** to open the **Activate Plugin** form on Now Support.
3. On the **Activate Plugin** form, provide the following information.

Activate Plugin form

Field	Description
What is your target instance	Select the instance that you want to activate the plugin on.
Which plugin would you like to activate	Select the name of the plugin to activate. **Note:** If the system doesn't list the plugin you want or if you're activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	Select the date and time to activate the plugin.

Example

For example, see the following form to activate the Event Management plugin on an instance named SNC Instance.

4. Select **Submit**.
   After the maintenance window, the system installs the plugin on your instance. To confirm the installation, go to the Installed tab in the Application Manager.

Result

Enabling the **Playbooks for Customer Service Management [com.sn_csm_playbook]** plugin lets you create playbooks for these tables and their extensions:

- Account [customer_account]
- Case [sn_customerservice_case]
- Change Request [change_request]. Requires Customer Service with Service Management (com.sn_cs_sm)
- Consumer [csm_consumer]
- Contact [customer_contact]
- Escalation [sn_customerservice_escalation]
- Household [csm_household]

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Incident [incident]. Requires Customer Service with Service Management (com.sn_cs_sm)
- Interaction [interaction]
- Order [csm_order]. Requires Customer Service Management for Orders (com.snc.csm.order)
- Order Line Item [csm_order_line_item]. Requires Customer Service Management for Orders (com.snc.csm.order)
- Problem [problem]. Requires Customer Service with Service Management (com.sn_cs_sm)
- Request [sc_request]. Requires Customer Service with Request Management (com.sn_cs_sm_request)
- Service Organization [sn_customer_service_organization]. Requires Service Organization (com.snc.service_organization)
- Task [sn_customerservice_task]

Note: If you create a custom table that extends a CSM table such as Case, you can create playbooks that trigger from it.

Activate Playbooks for Field Service Management

Activate Workflow Studio Playbooks on your instance so that you can create Playbooks triggered by tables.

Before you begin

Role required: Admin.

About this task

In order to create Playbooks in Workflow Studio that are triggered by Field Service Management tables, you must purchase a subscription to Field Service Management.

To purchase this subscription, contact your ServiceNow account manager. Your account manager can arrange to have the plugin activated on your organization's production and subproduction instances, generally within a few days.

If you don't have an account manager, decide to delay activation after purchase, or want to evaluate the product on a subproduction instance without charge, follow these steps to enable the **Playbooks for Field Service Management [com.sn_fsm_playbook]** plugin:

Procedure

1. Navigate to **All** > **System Applications** > **All Available Applications** > **All**.
2. Select **Request plugin** to open the **Activate Plugin** form on Now Support.
3. On the **Activate Plugin** form, provide the following information.

Activate Plugin form

Field	Description
What is your target instance	Select the instance that you want to activate the plugin on.
Which plugin would you like to activate	Select the name of the plugin to activate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Note: If the system doesn't list the plugin you want or if you're activating the plugin on an OEM or on-premise instance, select the **Plugin I'm looking for is not listed** check box and then enter the name of the plugin.
Select Maintenance Date and Time	Select the date and time to activate the plugin.

Example

For example, see the following form to activate the Event Management plugin on an instance named SNC Instance.

4. Select **Submit**.
   After the maintenance window, the system installs the plugin on your instance. To confirm the installation, go to the Installed tab in the Application Manager.

Result

Enabling the **Playbooks for Field Service Management [com.sn_fsm_playbook]** plugin lets you create Playbooks for these tables and their extensions:

- Work Task Flow [sf_work_task]
- Work Order Flow [sf_work_order]
- Work Order Task [wm_Task]
- Work Order [wm_order]
- Work Order Model [cmdb_workorder_product_model]
- Work Task Model [cmdb_worktask_product_model]
- Work Type [wm_work_type]
- Agent Personal Schedule [agent_events]
- Appointment Booking [sn_apptmnt_booking_appointment_booking]
- Questionnaire [wm_questionnaire]
- Service Order Task [sm_task]
- Service Order Task Template Dependency [sm_m2m_task_template_dependency]
- Asset Usage [sm_asset_usage]
- Part Requirement [sm_part_requirement]
- Service Management Incidentals [sm_incidentals]

Turn on AI skills for Playbooks

Turn on the ServiceNow Otto for Creator skills for using generative AI for creating and managing Playbooks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

- Install the ServiceNow Otto for Creator application. For more information, see Install ServiceNow Otto for Creator.
- Role required: admin

About this task

You can use AI to generate a playbook, a summary of a playbook, or recommendations for placeholder activities. To enable these features, activate the corresponding AI skill in *AI Admin Hub*.

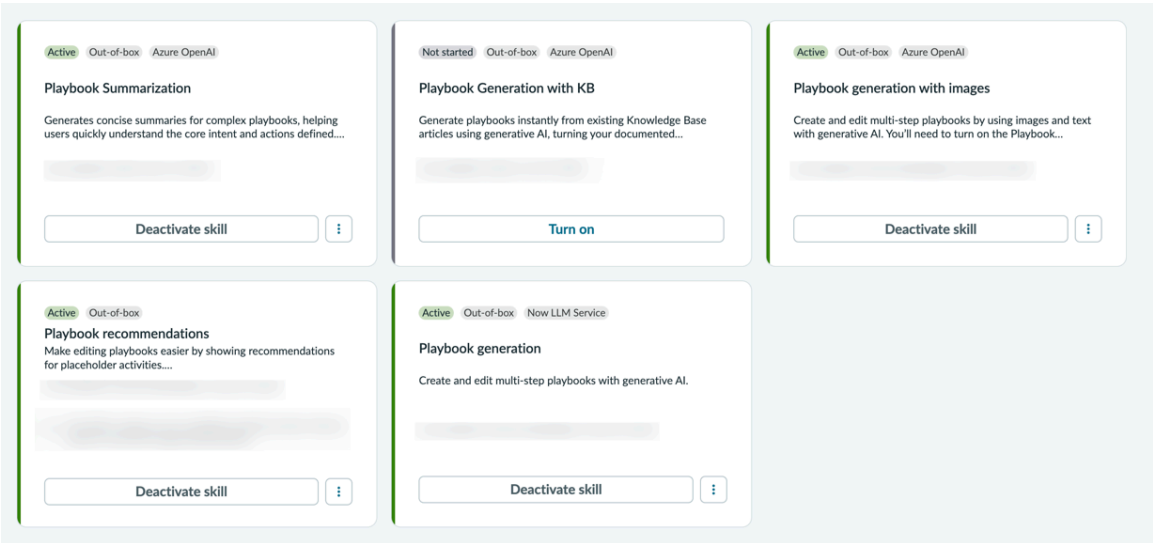
AI capabilities and associated skills

AI capability	AI skill name
Generate a playbook from text or image	Playbook generation Playbook generation with images
Generate a playbook from a knowledge base article	Playbook generation with KB
Generate recommendations for placeholder activities	Playbook recommendations
Generate a playbook summary	Playbook summarization

Important: The playbook generation skill requires a separate subscription to ServiceNow Otto for Creator.

Procedure

1. Navigate to **Admin** > *AI Admin Hub* > **AI Skills**.
2. In the workflow list, select **Creator**.
3. In the search box, search for `Playbook` skills.
4. On the skill tile, select **Turn on**.
   If a skill is already turned on, you see the option to deactivate the skill.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
Generative AI skills for Playbooks are active on your instance.

Related topics

Generate a playbook from text or image

Change the default LLM for playbook generation

Change the default LLM for playbook generation

Choose either the NowLLM/Mixtral model or OpenAI's GPT-4o as the default LLM to generate your playbooks.

Before you begin

- Role required: admin or playbook.admin
- OpenAI's GPT-4o LLM is not available in the APAC region.

Procedure

1. Open the **All** menu.
2. In the filter bar, type and enter **sys_one_extend_capability.list**.
3. Search for and select the **Playbook Generation** capability.
4. Open the **OneExtend Definition Configs** tab.
   The available LLMs are listed here. Under the **Default** column, a value of **true** indicates that the LLM is used to generate playbooks, by default. A value of **false** indicates that the LLM is not used to generate playbooks, by default.
5. Change the value in the **Default** column to **false** for the current default LLM.
6. For the LLM that you want to generate playbooks with, change the value in the **Default** column to **true**.

Result
Your default LLM has been changed.

Managing playbook permissions

Understand which mechanisms control who can build playbooks and who can interact with them while they run.

Playbooks control access through four mechanisms, each layered on top of the platform access control rules that apply to every table. Each mechanism serves a different purpose, and many configurations use more than one.

Two requirements apply regardless of which mechanism you use: all users need the snc_internal role to access internal resources, and completing an activity requires write access to that activity's Experience Status Record.

The four mechanisms

Roles

Grant broad access. The pd_author role grants full create, update, and delete access to all playbooks. Grants access to use every activity definition when editing a playbook except for those activity definitions that specify Roles Required. Use playbook.write for cases where pd_author is too broad a role. On its own it grants no read access to playbooks. Pair it with playbook.read or with a content access filtering rule to let users edit playbooks and use activity definitions. Roles

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

are hierarchical, so a higher-level role includes all roles beneath it. For more information, see Role-based access.

Delegated development

Scope playbook access to edit playbook content within a single application, including Playbooks and Activity Definitions. Users can still use activity definitions from other scopes within their playbook. For more information, see Delegated development access.

Content access filtering

Restricts access to specific content at design time. Create a content definition that describes the content, then create a filtering rule that specifies which roles can access it. You can filter by activity definition, by playbook type, or by resource tag. Use it when a role grants more access than a user should have. For example, the pd_author role allows users to edit any playbook and use any activity definition. You can grant a user playbook.write, which only lets them edit playbooks and use activity definitions that have been granted to them through content access filtering. For more information, see Content filtering for Playbook.

Runtime permissions

Controls which users can view and interact with a playbook that is already running. Playbook authors configure these settings during the build process, at the playbook and stage level. For more information, see Runtime permissions.

Public access playbooks are a playbook setting, not a separate mechanism. Enabling public access adds restrictions and removes none. For more information, see Public access playbooks permissions.

Design time and runtime

Roles, delegated development, and content access filtering control who can build and edit playbooks. Runtime permissions control who can act on a playbook that is already running.

Users need both types of access. Design-time mechanisms determine what someone can build. Runtime permissions determine what someone can do with a running playbook. To view a running playbook, a user must have read access on its parent record in addition to any custom permissions defined by the playbook author.

Administrators configure design-time mechanisms in the platform UI, and those apply across the instance. Playbook authors configure runtime permissions inside Workflow Studio while building, and those apply to one playbook.

Choosing a mechanism

Mechanism by goal

Goal	Mechanism
Let someone author playbooks without restriction	The pd_author role
Let someone author playbooks in one application only	Delegated development
Give read-only access to all playbooks	The playbook.read role
Show someone a subset of activity definitions	Content access filtering with the playbook.write role

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Mechanism by goal (continued)

Goal	Mechanism
Restrict access to edit a subset of playbooks	Content access filtering with the playbook.write role
Restrict one activity definition to a named role	Required roles on the activity definition
Let an operator cancel any playbook	The pd_cancel role
Restrict who can restart a playbook or add optional activities	Runtime permissions on the playbook
Run a playbook for users who have no login	Public access playbooks
Let a specific user or group complete an activity	Assignment on the activity's Experience Status Record

How the mechanisms interact

Using multiple mechanisms together is common. The following rules explain what happens when mechanisms overlap.

Roles accumulate

Assigning a role grants all permissions that role includes. Assigning playbook.admin grants every playbook role beneath it.

Required roles override content access filtering

A user without the required role can't use an activity definition even when a content filtering rule grants access to it.

Access control rules are a separate layer

Read access control rules on playbook tables can call into content access filtering logic. This means a user can be blocked by an access control rule even when a content filtering rule grants access. For more information, see Access control rules.

Runtime permissions only narrow access

The parent record defaults are required and can't be removed. Anything an author adds is a further condition. A playbook with runtime permissions configured is more restrictive than one without, never less.

Default permissions combine with AND; added permissions combine with OR

Read access on a playbook where the author added two roles resolves to read access on the parent record AND membership of the first role OR the second.

Runtime overrides cascade downward

A stage overrides the playbook. The most specific configuration takes precedence.

Read-only has several causes, only some related to permissions

A user who can't access every activity definition in a playbook sees a read-only view of that playbook, not a partial view. The same applies to a user without write access to the process definition. However, when a user is viewing a running playbook, an activity's form appears as read-only if there is no declarative action that requires form fields. This is a configuration issue rather than a permissions issue. Before concluding that a user lacks access, check declarative actions on the activity, the user's access to the activity definitions, and their write access to the process definition.

Completing an activity is governed separately

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Reading an activity and completing it are different operations with different sources. Read access comes from runtime permissions and the parent record. Completing or skipping depends on write access to the activity's Experience Status Record.

Public access adds restrictions to every mechanism

A role or filtering rule that grants access in an ordinary playbook may grant less in a public access playbook. Guest users still need access to the parent record, only activities with public access enabled can be used, and only public access playbooks can be nested. For more information, see Public access playbooks permissions.

Role-based access

Assign roles to control who can view, create, and edit playbooks.

Playbook roles are hierarchical. A higher role contains the roles beneath it, so assigning playbook.admin grants every role below it in the hierarchy. For the full list of roles and what each one permits, see Playbooks roles.

Note: All users need the snc_internal role to access internal resources, including playbooks. A user without it can encounter trigger validation errors when a playbook attempts to run. This is a platform requirement rather than a playbook role.

Choosing a role

pd_author

Assign to users who author playbooks without restriction. Contains the write, designer access, and activity definition read roles. Grants access to use every activity definition when editing a playbook except for those activity definitions that specify Roles Required.

playbook.write

Assign instead of pd_author when content access filtering restricts what the user sees. Use it for cases where pd_author is too broad a role. On its own it grants no read access to playbooks. Pair it with playbook.read or with a content access filtering rule to let users edit playbooks and use activity definitions. For more information, see Content filtering for Playbook.

playbook.read

Assign to grant read-only access to all playbooks.

playbook.designer_access

Assign to let a user open Workflow Studio and view playbooks without granting edit rights.

pd_operator, pd_cancel, and pd_restarter

Assign to grant a single runtime capability without design-time access. The pd_cancel role lets a user cancel a running playbook without holding playbook.admin or write access to the parent record. For example, use this to grant a manager an ability that agents don't have.

Roles outside playbook administration

The playbook.designer_access role contains two roles that playbook administrators don't manage. The sn_workflow_studio.workflow_studio_read role lets users to launch Workflow Studio. The sn_diagram_builder.db_read role allows users to view playbooks in diagram view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Granting Playbooks roles doesn't grant access to the Workflow Studio design environment. Users who create activity definitions might also need Workflow Studio access. For more information, see User access to Workflow Studio flows.

Other ways to grant access

Roles are one of several mechanisms. To scope access to a single application, see Delegated development access. To restrict access to subsets of content, see Content access filtering. For an overview of every mechanism, see Managing playbook permissions.

Delegated development access

Delegated development scopes playbook access to edit Playbook content within a single application, including Playbooks and Activity Definitions. Users can still use activity definitions from other scopes within their playbooks.

Delegated development grants playbook access within one application rather than across the instance. Create an application, assign users as developers on it, and grant them Playbooks permission. Delegated development controls whether playbook authors reach features that are otherwise restricted to admin users.

For general information about delegated development, see Delegated development and deployment and Developer and deployment permissions.

Roles granted

A user added as a delegated developer for Playbooks receives two roles automatically: the delegated_developer role and an application-specific role generated by the delegated development framework in the form sn_dd_[appname]_processautomationdesigner. Granting delegated admin access instead produces sn_dd_[appname]_delegatedadmin.

Application scope

A delegated developer must switch from the Global application scope to the scope of their assigned application. Until they do, Workflow Studio isn't available. Access checks resolve against the current application scope.

Access to activity definitions

Delegated developers reach all activity definitions by default, through the out-of-box content filtering rule that grants access to users with the delegated_developer role. For more information, see Content filtering for Playbook.

Grant delegated access to playbooks

Assign a user as a delegated developer so they can build playbooks within one application.

Before you begin
Role required: admin

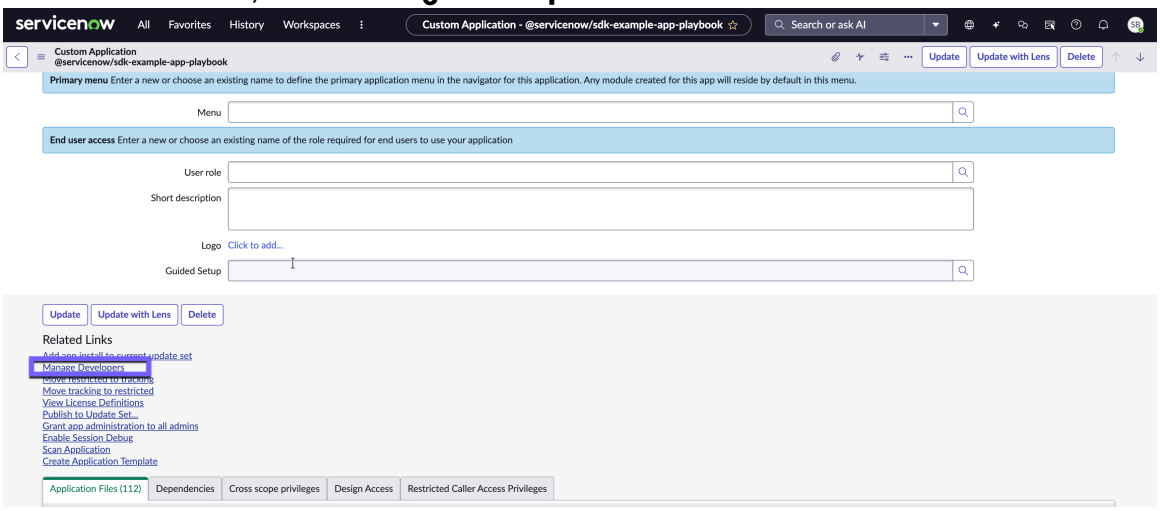
Each user assignment covers one application. Configure the application scope before you assign delegated access.

About this task
Grant delegated development access when a user should build playbooks inside a single application rather than across the instance. For more information, see Delegated development access.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Navigate to the application record.
2. Under Related Links, select **Manage Developers**.



3. Search for the user.
4. In the Developers list, locate the user row and enable the **Process Automation Designer** permission set.

   To grant all application permissions instead, enable delegated admin access.

5. Save the record.

Result

The user receives the delegated_developer role and an application-specific role. To build playbooks, the user must switch from the Global application scope to the scope of this application.

Content access filtering

Restrict access to subsets of playbook content by pairing a content definition with a filtering rule.

Content access filtering restricts what a user sees at design time. Use it when a role grants broader access than specific users should have. For example, the pd_author role allows users to edit any playbook and use any activity definition. You can grant a user playbook.write, which only lets them edit playbooks and use activity definitions that have been granted to them through content access filtering.

Filtering takes two records. A content definition describes a set of content. A content filtering rule names the roles that reach the content in that definition. Users need both the role named in the rule and a role that grants design-time access.

Filter on three axes. Filter by activity definition to control which activities a user can add to a playbook. Filter by playbook type to control which playbooks a user can see. Filter by resource tag to refine either.

Note: Assign the playbook.write role rather than pd_author to users who should see filtered content. The pd_author role grants access to all playbooks and all activity definitions, which overrides the restriction.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Default content definition

One content definition ships by default: Playbooks - All Activity Definitions. It covers every activity definition, and two default filtering rules point at it. One grants access to users with the delegated_developer role. The other grants access to users with the playbook.activity_def_read role.

Content definitions

A content definition specifies a type of resource. Create a definition that covers an entire resource, or use the condition builder to narrow it.

A definition on the activity definition table with a condition matching Guided Decision in the name or package covers only those activity definitions. A definition on the playbook table with a condition on playbook type covers only playbooks of that type.

Refine a definition further with resource tags. For more information, see Configure content filtering definitions.

Content filtering rules

A content filtering rule specifies the role a user must have to reach the content in a content definition. Each rule associates one or more roles with a single content definition.

To create one, see Configure content filtering rules.

Filtering by playbook type

Filtering on playbook type gives a group of users access to one category of playbook and no others. A business unit that owns its own playbook types can be restricted to those types.

Create a content definition on the playbook table conditioned on playbook type, then a filtering rule that names a role for the group. For the procedure, see Restrict access by playbook type.

Filtering by activity definition

Filtering on activity definition controls which activities a user can add when building a playbook.

To restrict a single activity definition to named roles instead, set required roles on the definition. Required roles override content access filtering, so a user without the required role can't use the activity definition even when a filtering rule grants access to it. For the procedure, see Restrict access to an activity definition.

Read-only playbooks

A user who can't reach every activity definition in a playbook gets a read-only view of that playbook. The same applies to a user without write access to the process definition.

Read-only isn't necessarily a permissions problem. A form also displays as read-only when the activity has no declarative action that requires form fields. An editable form with no way to submit it is not useful.

If a playbook appears read-only, confirm whether the user lacks content access before changing filtering rules.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Access to activity definitions

Content	With access	Without access
Activity definition	Visible and selectable when building a playbook. Can be copied and modified.	Hidden and not selectable. Playbooks that contain it are read-only.

Related permissions

Content access filtering is one of four ways to control playbook access. For the others and how they interact, see Managing playbook permissions.

Access control rules operate as a separate layer and can block content that a filtering rule grants. For more information, see Access control rules.

Configure content filtering definitions

Create a content definition that describes a set of content a filtering rule grants access to.

Before you begin

Role required: admin, playbook.admin

About this task

A content definition specifies a type of resource and, optionally, a condition that narrows it. Pair it with a content filtering rule to grant access. For more information, see Content access filtering.

Procedure

1. Navigate to **Process Automation** > **Flow Administration** > **Content Definitions**.

   The **Workflow Resources** table opens.

   If you don't have access to Flow Administration, **Content Definitions** appears directly under **Process Automation**.

2. Select an existing definition or select **New**.
3. Fill in the form.

Content definition fields

Field	Description
Name	Name of the content definition.
Application	Application the definition belongs to. Defaults to the current scope. Select **Global** to apply the definition across all applications.
Table	Table holding the content. Select the Process Definition [sys_pd_process_definition] table to filter by playbook type, or the Activity Definition [sys_pd_activity_definition] table to filter by activity.
Conditions	Conditions that narrow the definition. Leave empty to cover every record on the table.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Resource Tags	Tags that refine the definition further.

4. Select **Submit**.

What to do next
Create a content filtering rule that names the roles granted access to this definition. See Configure content filtering rules.

Configure content filtering rules

Create a rule that grants a role access to the content in a content definition.

Before you begin
Role required: admin, playbook.admin

A content definition must exist. See Configure content filtering definitions.

About this task
A content filtering rule associates one or more roles with a single content definition. Users with the named role can reach the content covered by the definition, unless the content has required roles set. For more information, see Content access filtering.

Procedure
1. Navigate to **Process Automation** > **Flow Administration** > **Content Filtering Rules**.

   The **Workflow Resource Filter Rules** table opens.

   If you don't have access to Flow Administration, **Content Filtering Rules** appears directly under **Process Automation**.

2. Select an existing rule or select **New**.
3. Fill in the form.

Content filtering rule fields

Field	Description
Name	Name of the rule.
User Role	Role a user must have to reach the content.
Delegated Development Permission	Optional. The resource path for which the user is a delegated developer.
Active	Whether the rule is in force.
Application	Application the rule belongs to. Defaults to the current scope.
Resource Definition	Content definition the rule grants access to.

4. Select **Submit**.

Result
Users with the named role can reach the content covered by the definition. Assign playbook.write rather than pd_author to those users, because pd_author grants access to all content and overrides the restriction because of a default, unmodifiable content filtering rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Restrict access by playbook type

Use content access filtering to give a group of users access only to playbooks of a specific type.

Before you begin

Role required: admin, playbook.admin

The playbook type you want to filter by must exist.

About this task

Restrict access by playbook type when a group of users should work with one category of playbook and no others. A business unit that owns its own playbook types can be given access to those types alone.

This uses the same content access filtering mechanism that restricts activity definitions. For more information, see Content filtering for Playbook.

Procedure

1. Create a role for the users who need this access.

   Use a descriptive name that identifies the group and the access, for example, a role named for the business unit and the read operation.

2. Create a content definition for the playbooks.

   a. Navigate to **Process Automation** > **Flow Administration** > **Content Definitions**.

      The **Workflow Resources** table opens.

   b. Select **New**.

   c. Set **Table** to the playbook table.

   d. In **Conditions**, add a condition on playbook type.

   e. Select **Submit**.

3. Create a content filtering rule that connects the role to the content definition.

   a. Navigate to **Process Automation** > **Flow Administration** > **Content Filtering Rules**.

      The **Workflow Resource Filter Rules** table opens.

   b. Select **New**.

   c. Set **User Role** to the role you created.

   d. Set **Resource Definition** to the content definition you created.

   e. Select **Submit**.

4. Assign the role to the users who need this access.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result
Users with the role see only playbooks of the type named in the content definition. Playbooks of other types aren't visible to them.

What to do next
Pair this with the playbook.write role rather than pd_author. The pd_author role grants access to all playbooks and overrides the restriction. For more information, see Role-based access.

Restrict access to an activity definition

Limit which users can add a specific activity definition to a playbook.

Before you begin
Role required: playbook.admin

About this task
Set **Required Roles** when an activity is sensitive and only certain roles should use it. Required roles override content access filtering, so a user without the required role can't use the activity definition even when a content filtering rule grants access to it.

Note: Both the playbook.admin and pd_content_author roles can edit activity definitions, but only the playbook.admin role can edit the **Required Roles** field.

Procedure
1. Navigate to **Process Automation** > **Playbook Administration** > **Activity Definition**.
2. Select the activity definition you want to restrict access to.
3. In the **Required Roles** field, add the roles that a user must have to use this activity definition.
4. Select **Update**.

Result
Users without one of the required roles can't select the activity definition when they build a playbook. Playbooks that already contain the activity definition open read-only for those users.

Access control rules

Access control rules operate at the platform level, independently of playbook permissions. A user can satisfy every playbook permission and still be blocked.

Playbook tables are subject to access control rules in the same way as any other table. Access control rules are the platform-level access mechanism and operate independently of playbook permissions. For general information, see Access Control Lists (ACLs).

Because the two are independent, a user can satisfy every playbook permission and still be blocked by an access control rule. The following sections cover where this happens.

Content access filtering

Access control rules for read operations on playbook tables can call into content access filtering and resource filter rule logic. A user can be blocked by an access control rule even when a content filtering rule grants access to the same content.

Note: When a user can't see content that a content filtering rule grants them, check the access control rules on the playbook table before revising the filtering rule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Completing and skipping activities

Whether a user can complete or skip an activity depends on write access to that activity's Experience Status record, which is usually a Flow Data record. This dependency is separate from playbook roles, content access filtering, and runtime permissions.

A non-admin user has write access to a Flow Data record in three cases.

- The **Assignment Group** and **Assigned to** fields are both empty, so any user can write to the record.
- The **Assignment Group** field is empty and the user is named in the **Assigned to** field.
- The **Assignment Group** field names a group that the user belongs to.

To give a user access to complete an activity, set the **Assigned to** field on the Flow Data record to that user. Alternatively, set the **Assignment Group** field and add the user to that group.

Access is enforced by access control rules on the sys_flow_data table.

Note: When a user can see an activity but can't complete it, check the **Assignment Group** and **Assigned to** fields before reviewing playbook roles or runtime permissions.

Public access playbooks

Guest users reach the playbook runtime through access control rules on the runtime APIs and messaging channels. Those rules determine what an unauthenticated user can retrieve. Guest users also need access to the parent record.

For the rules required and how to configure them, see Configure guest user access to playbooks. For the roles and restrictions that apply, see Public access playbooks permissions.

Runtime permissions

Runtime permissions restrict who can read, restart, cancel, and add optional activities to a running playbook.

By default, access to a running playbook follows the parent record. Users who can read the parent record can read the playbook, and users who can write to the parent record can restart it.

This default grants wider access than some processes require. For example, every agent who can read a case can also read every stage of every playbook running on that case.

Runtime permissions let a playbook author add further restrictions during playbook design. Configure permissions at the playbook level, then override them at the stage level where different access is needed.

Note: Runtime permissions only narrow access. The default parent record requirements always remain in effect and can't be removed. Any permissions you add are additional conditions, so a playbook with runtime permissions configured is always more restrictive than one without.

How conditions combine

Default permissions are required and combine with AND logic, meaning all conditions must be satisfied. Permissions that you add to an operation combine with OR logic, meaning any one condition is sufficient.

If a playbook author adds two roles to the Read operation, users need read access on the parent record AND membership in the first role OR the second role.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Operations you can restrict

Runtime permission operations

Operation	Configurable at	Governs
Read	Playbook, stage	Viewing the playbook or stage at runtime
Restart	Playbook, stage	Restarting the playbook or stage
Cancel	Playbook	Canceling a running playbook
Add optional activity	Stage	Adding an optional activity to a stage at runtime

Grouping settings

Grouping settings apply a permission across an entire level rather than to each item individually.

- Restart for all stages in a playbook
- Add optional activity for all stages in a playbook
- Restart for all activities in a playbook or a stage

Permission sources

Sources you can grant a permission from

Source	Grants the permission to
User	A named user
User role	Users holding the specified role
User group	Members of the specified group
User criteria	Users matching the specified user criteria record

The two record access sources can point at any record, not only the parent record of the playbook.

Overrides

Permissions configured at a lower level override those at the level above. A stage overrides the playbook. Where no override exists, the permissions from the level above apply.

Use an override when one part of a playbook requires different access from the rest. For example, a stage that handles payment details can require a role that the playbook as a whole doesn't.

Configure runtime permissions for a playbook

Add permission sets to a playbook to restrict who can view and act on it at runtime.

Before you begin
Role required: playbook.admin, pd_author

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

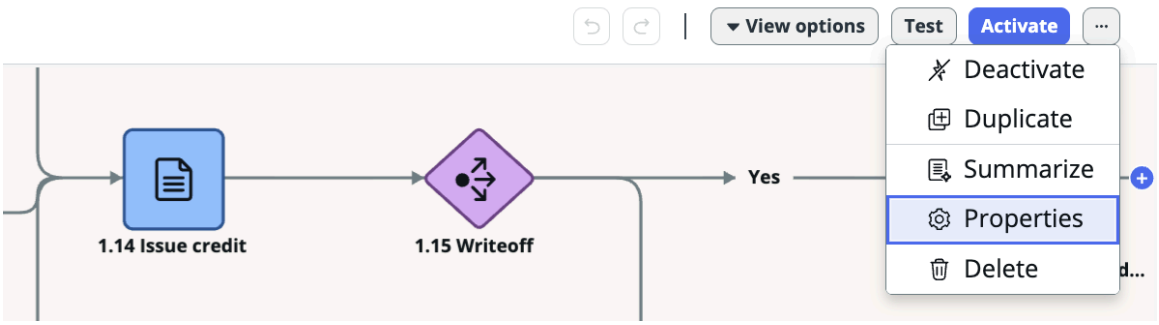
About this task

Permissions configured at playbook level apply to the whole playbook unless a stage overrides them. For an explanation of how permissions combine, see Runtime permissions.

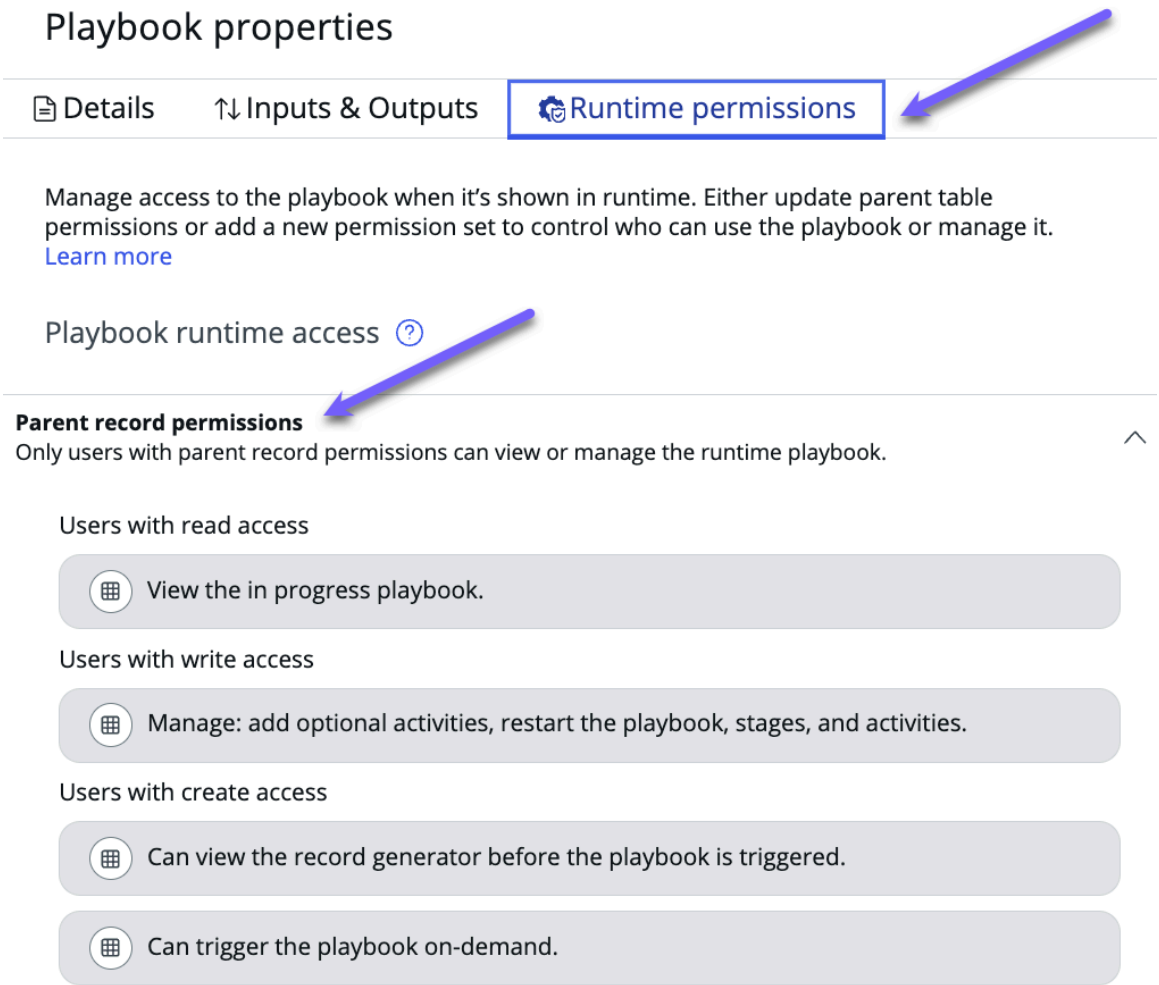
Note: The default parent record requirements always apply. Permissions you add here narrow access further and can't widen it.

Procedure

1. Navigate to **All** > **Workflow Studio** > **Playbooks**.
2. Open the playbook that you want to restrict.
3. From the **More actions** menu, select **Properties**.



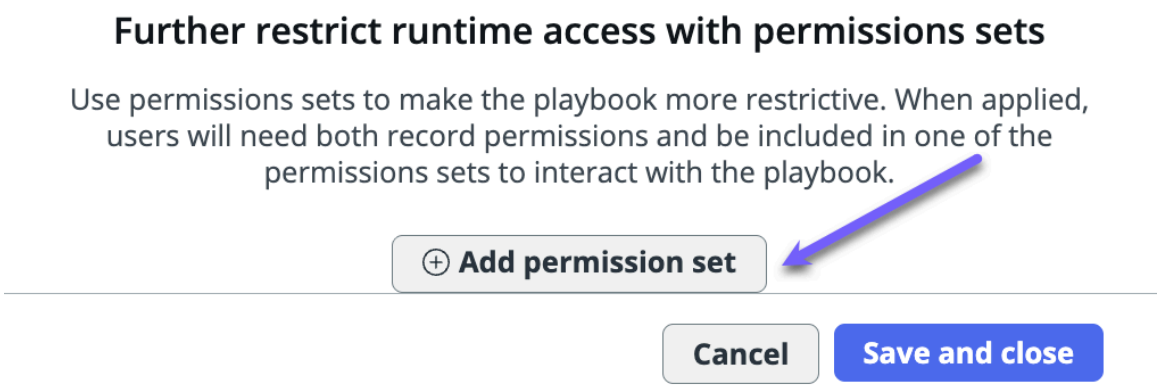
4. Select **Runtime permissions**.
5. Review the **Parent record permissions**.



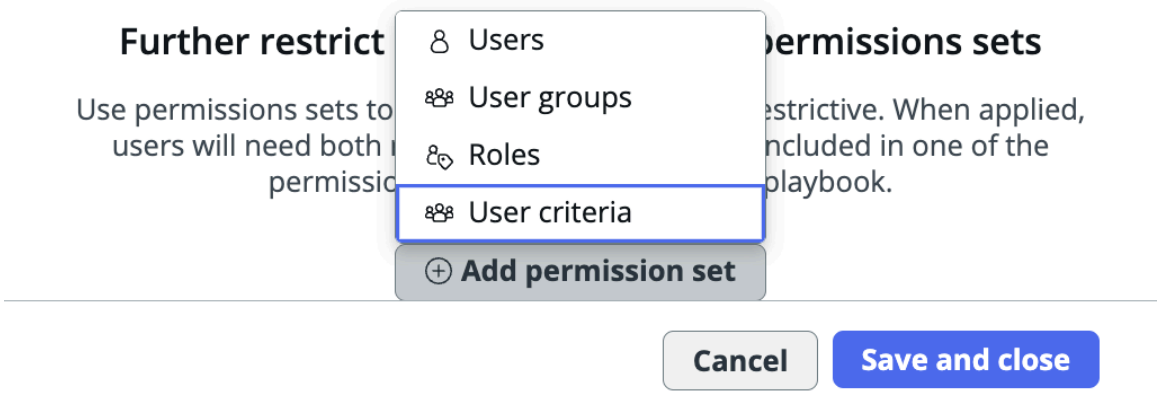
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

6. Add permissions and select its source.

a. Select **Add permission set** to restrict an operation.



b. Grant the permission set by **User**, **User group**, **Roles**, or a **User criteria** record.

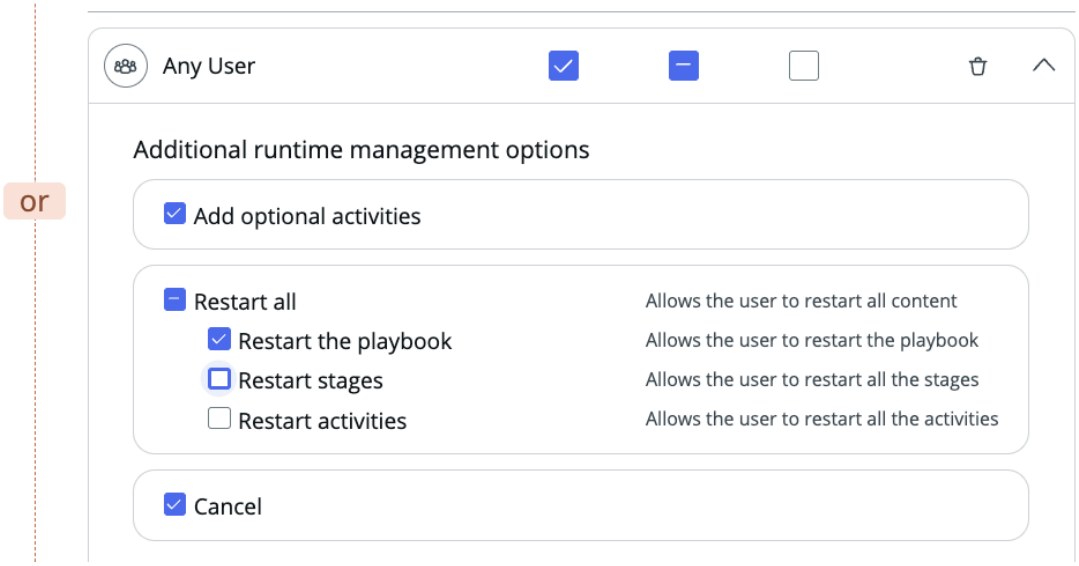


c. Select **View** to grant general access to the playbook.

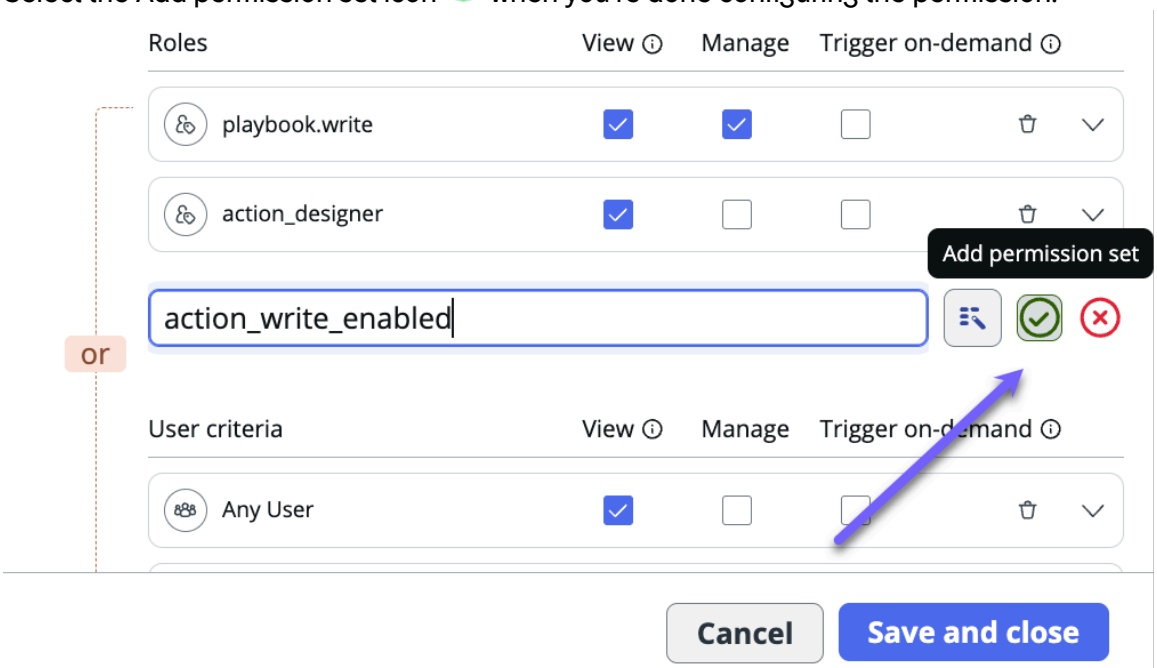
d. Optional: Select **Manage** to open and configure additional runtime options.

e. Optional: Select **Trigger on-demand** to grant access to view the record generator before the playbook is triggered.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



f. Select the Add permission set icon when you're done configuring the permission.



g. Optional: Select **Add permission set** to add more permissions to the same operation.

(Optional) Permissions added to one operation combine with OR, so any one of them satisfies it.

7. Select **Save and close**.

Result

Users must satisfy the default parent record requirement and at least one permission you added for each operation you restricted.

Example: Example: Restricting a playbook to expert agents

For example, a case resolution process has two playbooks: a detailed L1 playbook for newer agents, and a shorter L3 playbook for expert agents. Add a permission set to the L3 playbook that names the expert role or a user criteria record, so only those agents can access it at runtime.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next
Reactivate the playbook. Permission changes affect new executions after reactivation, not existing executions.

Related topics
Apply runtime permissions for a stage

Apply runtime permissions for a stage

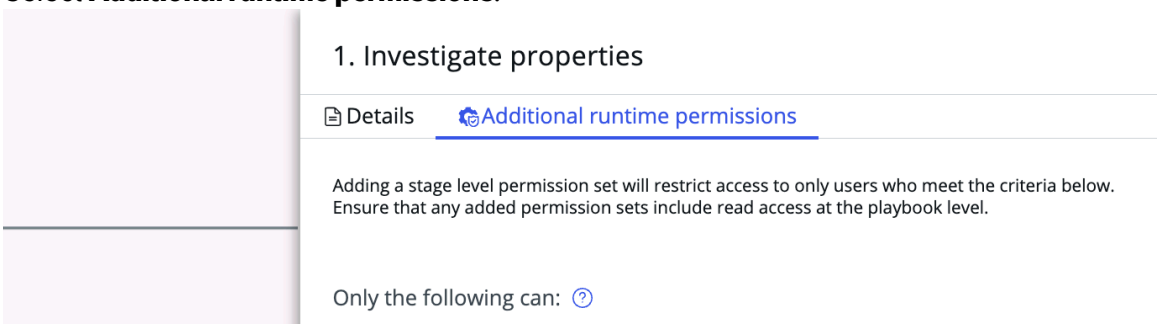
Add permission sets to one stage to give the stage different runtime access from the rest of the playbook.

Before you begin
Role required: playbook.admin, pd_author

About this task
By default, anyone who has read or write access to a parent record has access to a stage. Restrict permissions at the stage level when one stage needs access rules that the playbook as a whole doesn't. A stage that handles sensitive data can require a role that the rest of the playbook doesn't require.

Permission sets you add at stage level must also have read access at playbook level. A user who meets the stage criteria but has no playbook-level access can't read the stage. Where a stage has no override, the playbook-level permissions apply.

Procedure
1. Navigate to **All** > **Workflow Studio** > **Playbooks**.
2. Open the playbook that you want to work on.
3. On the diagram view, select the stage you want to restrict.
4. Select **Additional runtime permissions**.

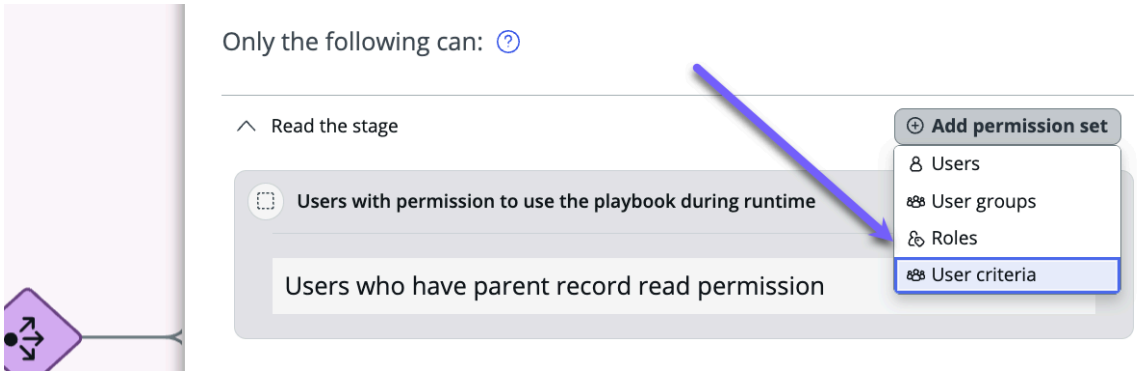


5. Review the inherited permissions.
6. Add permissions to an operation and select the source.

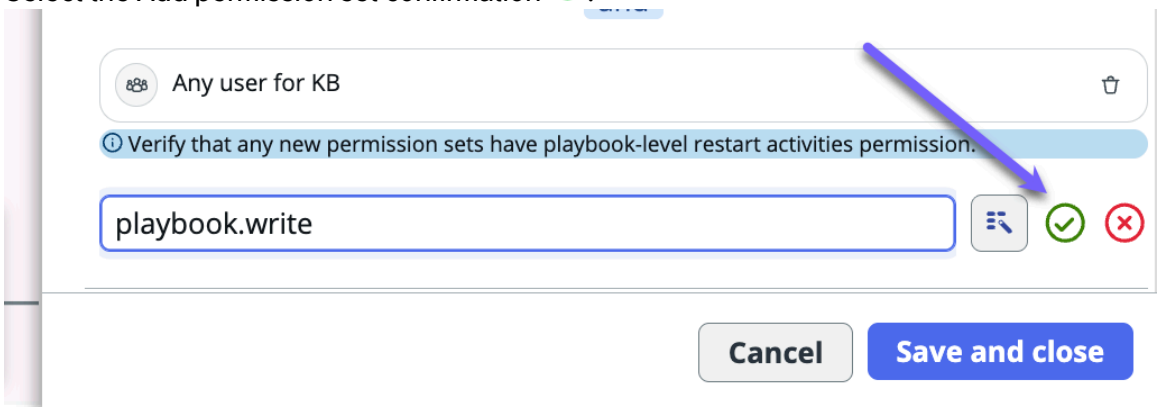
   a. Select **Add permission set** to restrict an operation.
   You can restrict access to the stage at the **Read the stage**, **Add optional activities**, **Restart the stage**, and **Restart the activity** operational level.

   b. Grant the permission set by **User**, **User group**, **Roles**, or a **User criteria** record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



c. Select the Add permission set confirmation .



d. Optional: Select **Add permission set** for the same operation to add more permissions.

(Optional) Permissions added to one operation combine with OR, so any one of them satisfies it.

7. Select **Add permission set** next to another operation to add permissions to a different operation.
8. Select **Save and close** to save your work on the playbook runtime permissions.

Result

The permissions you set on the stage further narrow the playbook-level permissions for that stage. Activities within the stage inherit the stage permissions.

What to do next

Reactivate the playbook. Permission changes affect new executions after reactivation, not existing executions.

Related topics

Configure runtime permissions for a playbook

Public access playbooks permissions

Public access playbooks use their own authoring roles and follow restrictions that don't apply to other playbooks.

A public access playbook runs for users who don't have a ServiceNow login. Because these users can't be granted standard roles, public access playbooks use their own authoring roles and follow a set of restrictions that don't apply to other playbooks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

For steps to set up and embed a public access playbook, see Configure guest user access to playbooks.

Roles for authoring public access playbooks

playbook.write.public_access

Required to create and edit public access playbooks. Users without this role have read-only access. Delegated developers also require this role.

playbook.content_author.public_access

Required to edit the public access field on an activity definition.

playbook.automation_runner

The restricted runner that automations use when executing in a public access playbook. Automations run with limited system access, not broad system privileges.

Restrictions

Public access playbooks are subject to the following restrictions:

- You can enable public access only when you create the playbook. You can't convert an existing playbook to public access.
- A playbook must have a parent record because runtime permission checks depend on it. Standalone playbooks can't be made public.
- Only activities with public access enabled can be included. Some activity definitions have public access enabled by default.
- Only other public access playbooks can be nested inside a public access playbook.
- Playbook type settings control which public features are allowed or blocked.
- Guest users still need access to the parent record through access control rules. Public access doesn't bypass record-level security.
- Runtime APIs and messaging channels require guest-safe access control rules and permission checks.
- Automations can't be used directly. Wrap each automation in an activity definition before using it.
- Any data that a guest user isn't authorized to view is hidden entirely, rather than displayed in a restricted form.

Risks and considerations

A public access playbook is accessible to users you haven't authenticated. Review the following considerations before enabling public access:

Data exposure through APIs and messaging

Guest users access the playbook through runtime APIs and messaging channels. The access control rules on those endpoints determine what data a guest user can retrieve.

Flow data access

Automations in a public access playbook run under a restricted runner rather than with broad system access. Review what flow data the automations in your playbook can reach.

Load from public users

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Anyone who can reach the page where the playbook is embedded can start it. Plan for the volume of requests this may generate.

Activity definition review

Enabling public access on an activity definition makes it available to all public access playbooks. Review each definition carefully before allowing public use.

Administering Playbooks

Monitor and troubleshoot issues by reviewing playbook executions.

These modules are provided for admins to monitor and manage Playbooks.

Today's Executions

Displays a list of records for Playbooks runs today.

Active Processes

Displays a list of all active Playbooks.

30+ Day Processes

Displays a list of all active Playbooks that are 30 days or older.

Activity Definitions

View or create activities.

Asset Configuration

View or create automation assets like flows, subflows, and actions.

Trigger Definitions

View or create triggers.

Data Definitions

View or create data definitions. Data definitions are pieces of information that you only reuse in a specific playbook, and are stored in the sys_flow_data_definition table.

User access to Playbooks in Workflow Studio

Administrators can grant users access to Playbook by assigning delegated development permissions or directly assigning a user role. Administrators can also specify which features and content a user can access based on user roles.

Access by user role

Administrators can grant access to Playbook in Workflow Studio by directly assigning users the pd_author user role, which includes the role to view activity definitions.

Roles for Playbook in Workflow Studio

Role	Description	Contains Roles
playbook.admin	Enables users to: • Create, update, and delete trigger definitions. • Launch Workflow Studio to create, activate, edit, and delete playbooks. • Create, edit, and delete activity definitions.	• pd_author • pd_content_author • pd_trigger_author • pd_operator • pd_cancel

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles for Playbook in Workflow Studio (continued)

Role	Description	Contains Roles
	• View the Experience activity types (sys_pd_activity) and Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience.	
pd_author	Enables users to: • Launch Workflow Studio to create, activate, edit, and delete playbooks. • View all activity definitions. • View the Experience activity types (sys_pd_activity) and Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience.	• pd_shared.user • playbook.write • playbook.activity_def_read
pd_content_author	Enables users to: • Create, edit, and delete activity definitions. • Create, edit, and delete trigger definitions. • View the Experience activity types (sys_pd_activity) and Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience.	• pd_trigger_author • pd_shared.user • playbook.activity_def_read
pd_trigger_author	Enables users to create, update, and delete trigger definitions.	none
pd_operator	Enables users to view process executions, activity executions, and execution logs only.	none
pd_shared.user	Enables users to view the Experience activity types (sys_pd_activity) and	none

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles for Playbook in Workflow Studio (continued)

Role	Description	Contains Roles
	Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience.	
pd_shared.admin	Enables users to edit the Experience activity types (sys_pd_activity) and Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience.	pd_shared.user
pd_cancel	Enables users to cancel running playbooks without the playbook.admin role or write access to the parent record. For example if you want to grant an agent manager the ability to cancel playbooks, but not an agent.	none
pd_restarter	Enables users to restart active playbooks.	none
playbook.write	Enables users who have content filtering restrictions to: • Launch Workflow Studio to create, activate, edit, and delete playbooks. • View the Experience activity types (sys_pd_activity) and Experience activity properties (sys_pd_activity_type_prop) tables that are shared by Playbooks and Playbook Experience. To learn more about content access filtering, see Content filtering for Playbook.	pd_shared.user
playbook.designer_access	Enables users who have content filtering restrictions to launch Workflow Studio to view playbooks. To learn more about content access filtering, see Content filtering for Playbook.	pd_shared.user

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Roles for Playbook in Workflow Studio (continued)

Role	Description	Contains Roles
playbook.activity_def_read	Enables users to view all activity definitions as long as there aren't Required Roles.	none

A visual representation of where roles are contained:

- playbook.admin
  - pd_content_author
    - playbook.activity_def_read
    - pd_shared.user
    - pd_trigger_author
  - pd_operator
  - pd_cancel
  - pd_restarter
  - pd_author
    - playbook.write
      - playbook.designer_access
        - pd_shared.user
        - sn_workflow_studio.workflow_studio_read

          Note: This role allows users to launch Workflow Studio, and is not managed by playbook administrators.

        - sn_diagram_builder.db_read

          Note: This role allows users to view playbooks in the diagram view in Workflow Studio, and is not managed by playbook administrators.

      -
    - playbook.activity_def_read
  - pd_shared.admin
    - pd_shared.user
    -
- delegated_developer

Delegated development access

Administrators can grant users access to Workflow Studio playbooks by creating an application and assigning users as developers with the playbook delegated development permission. Delegated development allows administrators to control whether playbook authors can access features normally restricted to admin users. For more information, see Developer permissions.

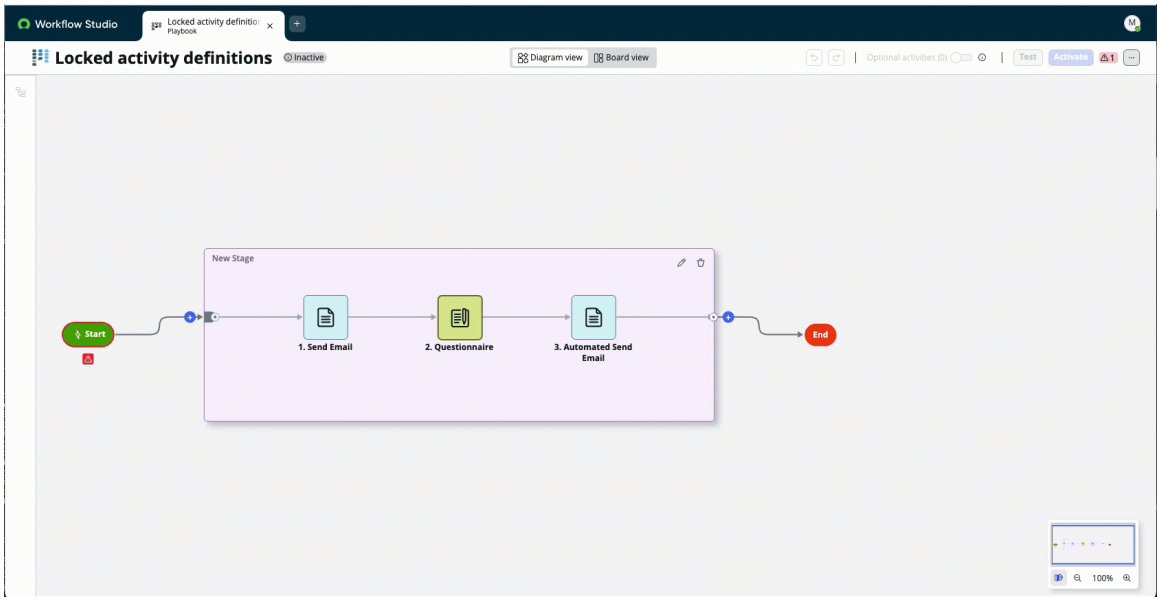
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Role-based content filtering

Specify the user roles necessary to access Workflow Studio playbook content. For example, activity definitions and process definitions. Manage content filtering by creating content definitions and content filtering rules. For more information, see Content filtering for Playbook.

Role-based activity definition access

Manage activity definition access by specifying the **Required Roles** to access an activity definition. Users who can view the playbook but who do not have the required role to access activities with this activity definition will have a read-only view of the playbook.



To learn more about activity definitions, see Create an activity definition and Activity definitions.

Note: Both playbook.admin and pd_content_author roles can edit activity definitions, but only the playbook.admin role can edit the **Required Roles** field.

Content filtering for Playbook

Specify which content a user can access based on the user's role.

Display only content that is relevant for a particular user, hiding content that is unnecessary or sensitive. Specify the Workflow Studio playbook content that you want to control access to and the role that a user must have to access it. For example, if a user with the guided_decision_builder role is creating a playbook, show only a relevant set of activities.

To implement content filtering, you need:

- Content definitions to specify types of content.
- Content filtering rules and roles to determine who can access the content.

There is one content definition for Playbook by default, the **Playbooks - All Activity Definitions** content definition. The **Playbooks - All Activity Definitions** content definition has two content filtering rules by default:

- **(Default) Playbook - Users with delegated_developer role can access all activity definitions**
- **(Default) Playbook - Users with playbook.activity_def_read role can access all activity definitions**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

This means that users with the roles delegated_developer or playbook.activity_def_read role can access all activity definitions. Get started with content filtering by using default definitions and rules, or create your own.

Content definitions

Content definitions specify a type of Workflow Studio resource. Resources are key elements of Workflow Studio components, such as activity definitions for playbooks. Create content definitions to include an entire resource, or use a condition builder to refine your definitions. For example, the content definition for playbook activity definitions includes all activity definitions, but you could create a content definition that includes only the activity definitions that contain Guided Decision in the **Name** or **Package**.

You can further refine content definitions through tagging. Add resource tags to items in a resource list, then design your content definition to only include resources with that tag.

Content filtering rules

Content filtering rules specify the role that a user must have to access the content in a particular definition. Each rule associates user roles with a single content definition. When a user accesses Playbook in Workflow Studio, content filtering rules determine what activities the user may access based on the user's role.

Role-based activity definition access

Manage activity definition access by specifying the **Required Roles** to access an activity definition. This overrides any content access filtering. To learn more about roles, see Playbooks roles. To learn more about activity definitions, see Activity definitions.

Note: Both playbook.admin and pd_content_author roles can edit activity definitions, but only the playbook.admin role can edit the **Required Roles** field.

Read-only playbooks

Users have a read-only view of playbooks with:

- activities they do not have access to,
- process definitions **[sys_pd_process_definition]** they don't have write access to.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Access summary

Resource filtered	User has role	User does not have role
Activity Definition	• The activity definition is visible to select when building a playbook. • The activity definition can be copied. • The activity definition can be modified.	• The activity definition is hidden and cannot be selected when building a playbook. • Playbooks with the activity definition are read-only.

Design considerations

Content definition roles for activity definitions

Give users access to the subset of activity definitions in a content definition by assigning the playbook.write role, not the pd_author role.

Configure content filtering definitions for Playbook

Specify which content a user can access by creating content definitions.

Before you begin

Content filtering requires some familiarity with user roles and Workflow Studio tables and records.

Role required: admin, playbook.admin

About this task

Filter Workflow Studio playbook content based on user role. Filtering content requires you to set up:

1. Content definitions describe the content that you want to filter. Content definitions specify types of Workflow Studio resources, such as activity definitions.
2. Content filtering rules to state the role a user must have to access the resource in a particular definition.

There is one content definition for Playbook by default, the **Playbooks - All Activity Definitions** content definition. The **Playbooks - All Activity Definitions** content definition has two content filtering rules by default:

- **(Default) Playbook - Users with delegated_developer role can access all activity definitions**
- **(Default) Playbook - Users with playbook.activity_def_read role can access all activity definitions**

This means that users with the roles delegated_developer or playbook.activity_def_read role can access all activity definitions. Get started with content filtering by using default definitions and rules, or create your own.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. To modify or create a content definition, navigate to **Process Automation** > **Flow Administration** > **Content Definitions**.

   Note: If you don't have access to Flow Administration, the Content Definitions module is directly under Process Automation instead.

2. Select the definition that you want to modify or click **New** to create one.
3. On the form, fill in the fields.

Workflow Resources form

Field	Description
Name	Name for the content definition.
Application	Application scope to which the content definition applies. This field is automatically set to the currently selected application scope. If no application scope is selected, the field is set to Global. If you set a specific application scope, then the content definition only applies to that application scope. If you select the Global application scope, then the content definition applies to all applications.
Table	Table containing the resource type that you're defining. For example, the Activity Definitions [sys_pd_activity_definition] table includes all the activity definitions available on your instance.
Conditions	Conditions used to filter the records in the table. For example, creating a condition where **[Name] [contains] [Guided Decisions]** returns only the activities that include the term Guided Decisions in the name.
Resource Tags	Tags used to filter the resources in the table.

4. Click **Submit**.

Configure content filtering rules for Playbook

Use content filtering rules to specify the role a user must have to access content.

Before you begin

Role required: admin, playbook.admin

Content filtering requires some familiarity with user roles and playbook tables and records.

About this task

Filter Workflow Studio playbook content based on user role. Filtering content requires you to set up:

1. Content definitions describe the content that you want to filter. Content definitions specify types of Workflow Studio resources, such as activity definitions.
2. Content filtering rules to state the role a user must have to access the resource in a particular definition.

There is one content definition for playbooks by default, the **Playbooks - All Activity Definitions** content definition. The **Playbooks - All Activity Definitions** content definition has two content filtering rules by default:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **(Default) Playbook - Users with delegated_developer role can access all activity definitions**
- **(Default) Playbook - Users with playbook.activity_def_read role can access all activity definitions**

This means that users with the roles delegated_developer or playbook.activity_def_read role can access all activity definitions, unless **Required Roles** is configured. Get started with content filtering by using default definitions and rules, or create your own.

Procedure

1. To modify or create a content filtering rule, navigate to **Process Automation** > **Flow Administration** > **Content Filtering Rules**.

   Note: If you don't have access to Flow Administration, the Content Filtering Rules module is directly under Process Automation instead.

2. Select the rule that you want to modify or click **New** to create one.
3. On the form, fill in the fields.

Workflow Resources Filter Rule form

Field	Description
Name	Name for the content filtering rule.
User Role	The role a user must have to access the content in the **Resource Definition** field.
Delegated Development Permission	The specific **Resource Path** that the user is a delegated developer for. Configure the **Resource Path** in the [sys_development_permission_set] table.
Active	Option to enable the rule.
Application	Application scope to which the content filtering rule applies. This field is automatically set to the currently selected application scope. If no application scope is selected, the field is set to Global. If you set a specific application scope, then the content filtering rule only applies to that application scope. If you select the Global application scope, then the content filtering rule applies to all applications.
Resource Definition	The name of the content definition that specifies the resource to filter.

4. Click **Submit**.

Archive process contexts

Improve database query performance by archiving unneeded records for playbooks that are in a **Complete**, **Error**, or **Cancelled** state.

Before you begin

Role required: admin or playbook.admin

About this task

Depending on how many playbooks you have run, you may have hundreds or thousands of records in your database that aren't used anymore. Reduce the number of records that your

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

database queries have to search through by archiving the records for playbooks that are in a **Complete**, **Error**, or **Cancelled** state.

By default, context records are automatically archived for process executions that are:

- In **Complete**, **Skipped**, or **Cancelled** state
- For a playbook that hasn't been edited within 14 days.

> **Note:** You can adjust the number of days. To learn more about configuring archive settings, see Configure archive settings for process contexts.

If you don't want context records to automatically be archived, see Turn off automated archiving.

Contexts for process executions that are in an **Error** state must be archived manually.

> **Note:** If you no longer need logs for a process execution that ended in an error, archive the context records.

When you archive context records for a process execution, the following records are compressed into a single JSON record:

- Element mapping [`sys_element_mapping`]
- Context log [`sys_pd_context_logs`]
- Variable value [`sys_variable_value`]
- Activity context [`sys_pd_activity_context`]
- Stage context [`sys_pd_lane_context`]

The JSON record can be viewed, but not edited. To learn more about viewing the JSON record for archived context data, see View archived process contexts.

> **Warning:** Archiving cannot be undone. If you need context logs or reports that use these records, don't archive. If automated archiving creates report problems, turn off the feature. To learn how to turn off automated archiving, see Turn off automated archiving.

Agents can still open playbooks to see historical data, such as why a playbook was canceled or who an activity was assigned to.

Flow context (`sys_flow_context`) records are also deleted automatically 2 weeks after completion. For more information about flow data retention, see Flow execution details retention.

Procedure

Manually archive context records for a process execution

1. Navigate to **All**, and enter **sys_pd_context.list** in the Filter field to open the [sys_pd_context] table.
2. Select the check boxes next to the executions that you want to archive context records for.
3. In the upper right corner, select **Archive Process Contexts** from the action menu.
4. Confirm that you want to archive the process contexts.

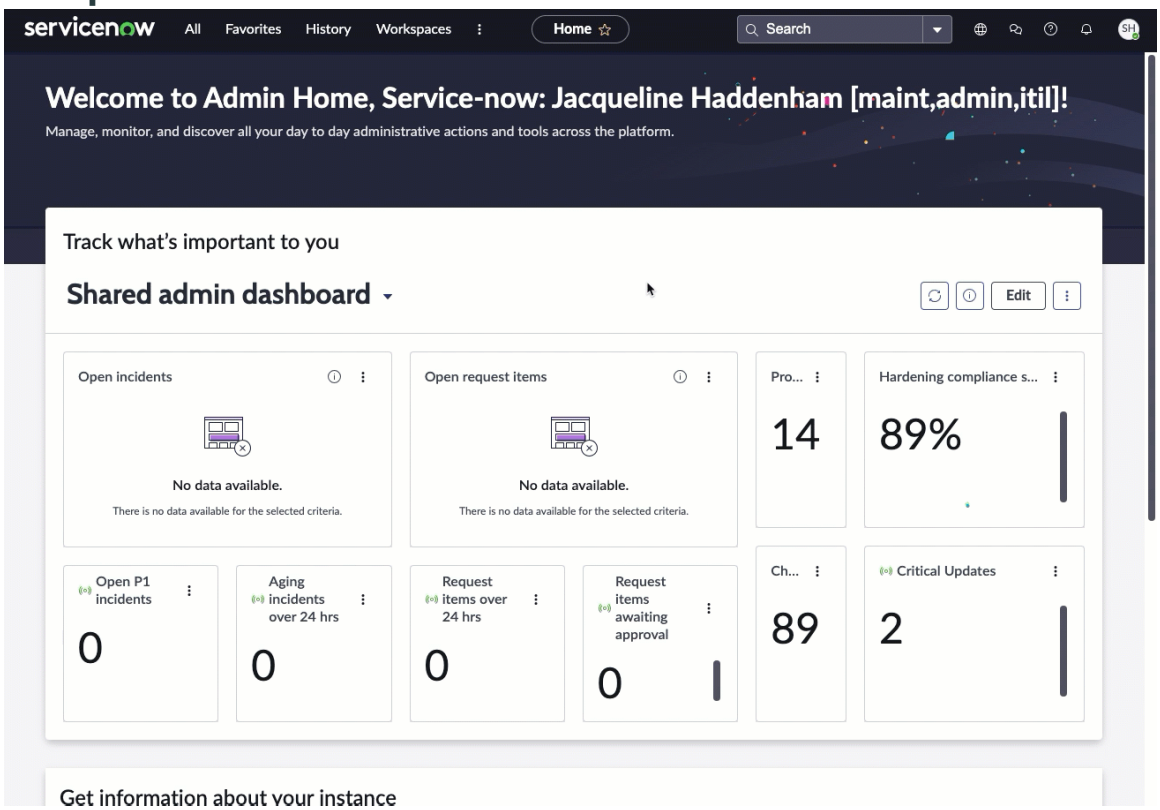
Result

The context records are archived for your selected process executions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Trouble?
If you have a large number of context records to archive, records are archived in limited batches on an hourly basis, to avoid slowing down the instance.

Example: Archive context records for an execution



What to do next
Configure the form layout for process executions so that you can see the archived data. To learn more about configuring the form layout for a process execution, see View archived process contexts.

Configure archive settings for process contexts

Change the default settings for the automated archiving feature for process contexts.

Before you begin
Role required: playbook.admin

If you want to turn off automated archiving instead, see Turn off automated archiving.

Procedure

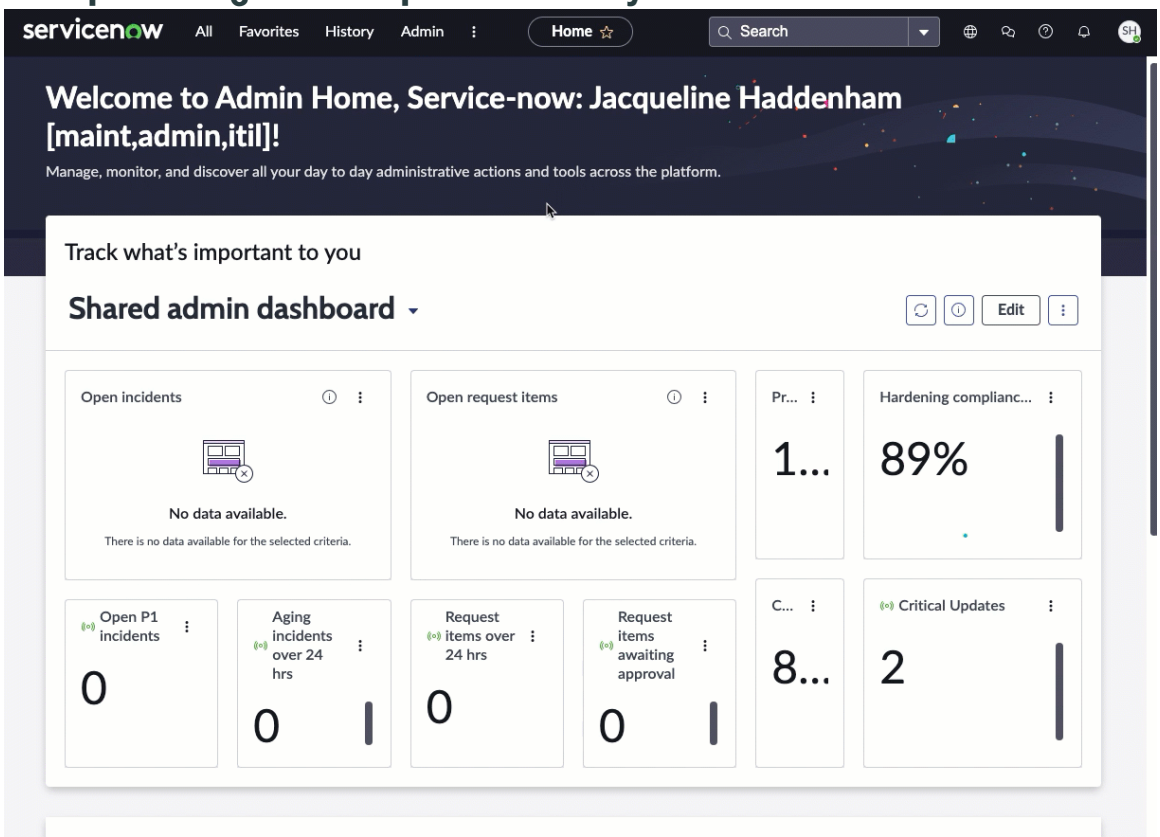
1. Navigate to **All** > **System Properties** > **All Properties**.
2. Search for and open the **sn_pa_designer.data_retention_policy** property.
3. Select the **here** link in the warning message to edit the record.
4. Change the **Value** to the number of days a complete or cancelled playbook must be unedited before the context records for it can be archived.
   The default value is 14. If you want context records for executions to be archived as soon as a playbook is complete or cancelled, you can set the value to 0. If you want to wait longer before context records can be archived, enter a greater number.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

> **Warning:** Changing other fields in this record could potentially break automated archiving.

5. Select **Update**.
   Your change is saved.

Example: Change the wait period to 30 days



Turn off automated archiving

Turn off the automatic archiving of context records for your complete and cancelled playbooks.

Before you begin

Role required: playbook.admin

If you want to change the number of days to before a playbook is archived instead, see Configure archive settings for process contexts.

Procedure

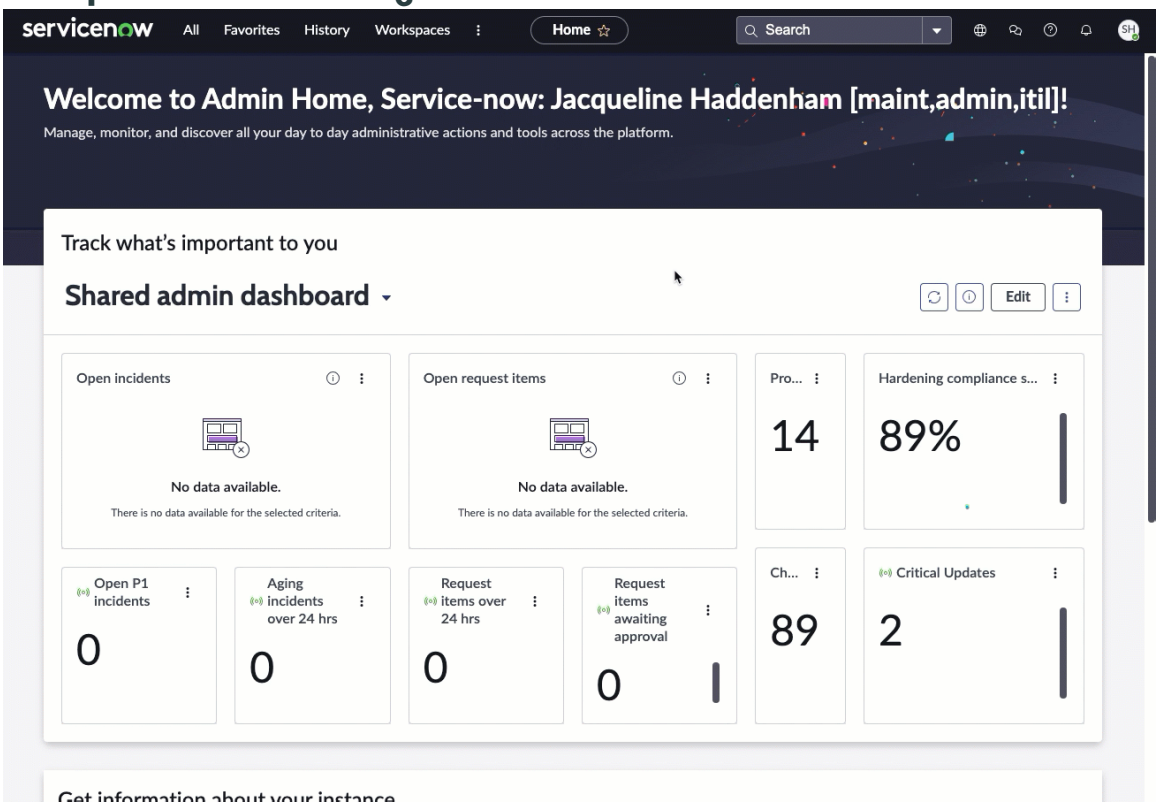
1. Navigate to **All** > **System properies** > **All Properties**.
2. Search for and open the **sn_pa_designer.enableDataRetentionFeatures** property.
3. Select the **here** link in the warning message to edit the record.
4. Set the **Value** to **false**.

> **Warning:** Changing other fields in this record could potentially break automated archiving.

5. Select **Update**.
   Automated archiving is turned off.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Example: Turn off archiving



View archived process contexts

Configure the form layout for a process execution so that you can see the JSON record for archived context records.

Before you begin

Role required: admin or playbook.admin

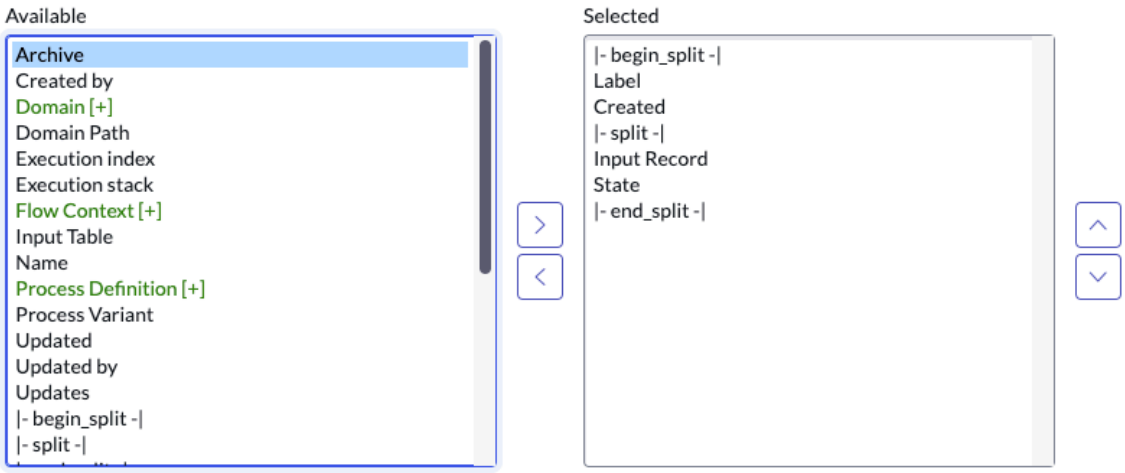
About this task

To view the archived context records for a process execution record, you must configure the Form Layout for process execution records. If you haven't archived any context records for a process execution and want to, see Archive process contexts.

Procedure

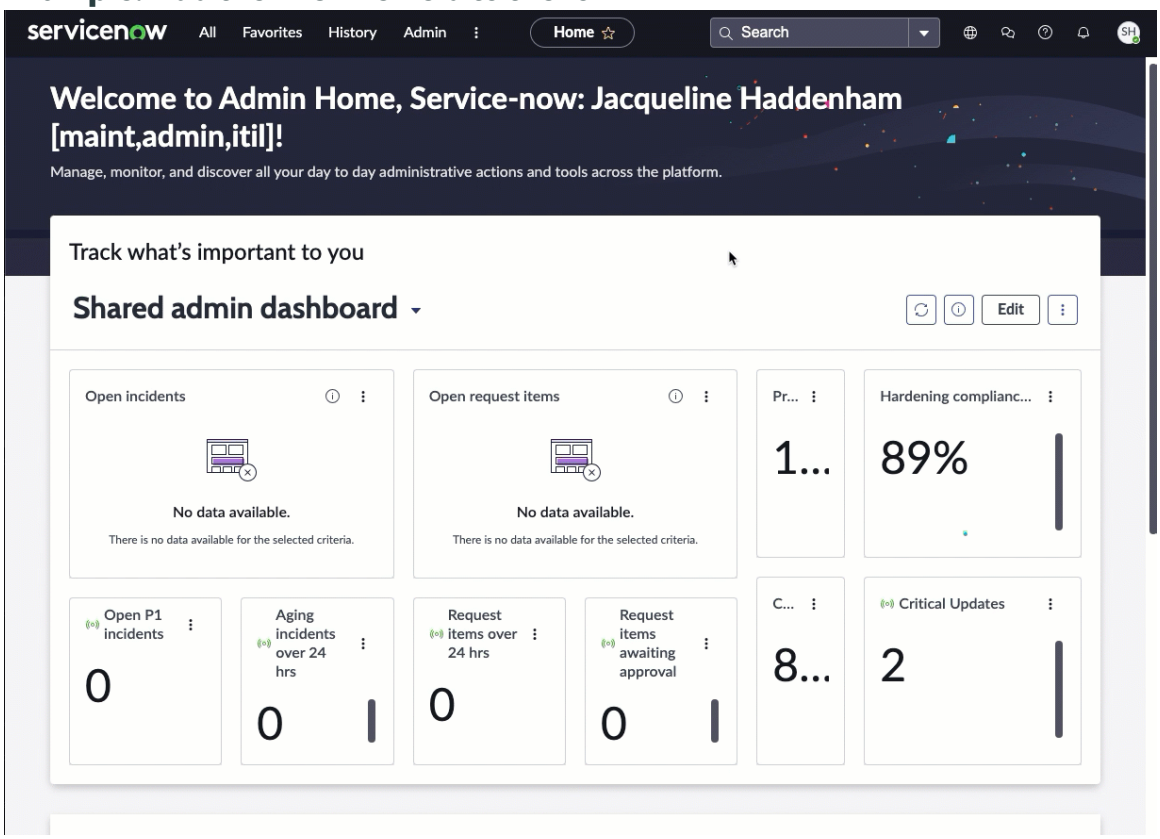
1. Navigate to **All**, and enter **sys_pd_context.list** in the Filter field to open the [sys_pd_context] table.
2. Open any process execution.
3. Open the form context menu ( ).
4. Select **Configure** > **Form Layout**.
5. In the Available list, double-click **Archive** to move it to the **Selected** list.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



6. Select **Save**.
   The Archive field appears in all process execution records.
7. Open a process execution with archived process context records.
   You can view the JSON record of the archived context records for the process execution in the Archive field.

Example: Add the Archive field to the form



Create a Data Definition

Use data definitions to collect and use pieces of information later in a playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Important: As of the 26.1 release, the **Collect user data** activity is no longer available in the activity picker. The activity will continue to function wherever it is used, but for new activities use the **Questionnaire** activity instead. The **Questionnaire** activity does not require you to create a data definition. To learn more about the **Questionnaire** activity, see Questionnaire activity.

Role required: admin, flow_designer

You will be working in the ServiceNow AI Platform to complete this task.

About this task

A data definition is the information that you want an agent or fulfiller to collect during a playbook run, and is the key input of the **Collect user data** activity. Playbook authors define the data they want an agent or fulfiller to collect in the `sys_flow_data_definition` table. When an agent or fulfiller collects the information, the information is stored in the `sys_flow_data` table for use later during the playbook run, instead of in the record table.

Only use a data definition if:

- The data is only needed downstream during a single playbook run. It's collected, used, and never needed again.
- You don't need to run any reports on the collected data. If you need any metrics or reports on the collected data, create a table and use the User Form activity instead.

For example, you may have multiple teams that perform activities. One team enters the inputs for a created data definition when they perform a **Collect user data** activity, and then a second team uses the collected inputs to complete the playbook, and the information is not needed afterwards.

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Administration** > **Data Definitions**.
2. Select **New** to create a new data definition.
3. Give your new data definition a name.

   Note: Data definitions have the same scope as other metadata tables, by default.

4. Right-click in the record header to **Save**.
   If you select the **Submit** button, you are taken back to the **Data Definitions** list and will need to select your new data definition to re-open it.
5. Add fields for information that you want an agent to collect.
   a. In the **Flow Data Variables** table, select **New**.
   b. Enter the required fields.

Option	Description
Type	The type of input the agent is collecting for a field. For example, string, reference, integer, etc.
Label	The label of the field in the UI, during the play book run. The label can consist of any text.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
Column name	The name of the input being collected. Spaces cannot be used to delimit words.
Max Length	The maximum length a string value can be entered for a string type of field. The variable can store longer strings than it can display.
Application	The application scope for the data variable. It is always set to Global, and cannot be changed.

Optional configurations

6. **Optional:** Under the **Default Value** tab, specify the value used when a playbook does not provide a value.
7. Right-click in the record header to **Save**.
8. **Optional:** Under the **Choice List Specification** tab, use the **Choice** field to present options as a choice list to agents, or to add choices to a field of List type.
   This tab only appears when you select an applicable **Type**.

   Note: In **Advanced view**, an additional **Choice table** field displays.

Advanced view

9. **Optional:** Select **Advanced view** under **Related Links** to configure more fields.

Result
The data definition can now be used when configuring activities in Playbooks in Workflow Studio.

Example:
During a playbook run, you can use data definitions to potentially:

- Collect a shipping address, then reference the address when generating a shipping label.
- Ask the user "yes" or "no" questions, and determine subsequent activities based on the user's responses.

What to do next
Per Yaron/Bim, add a topic on defining a form view for your data definition and link down here. Jay Wang is creating draft in sharepoint.

Configure a **Collect user data** activity in Workflow Studio Playbooks to use your new data definition.

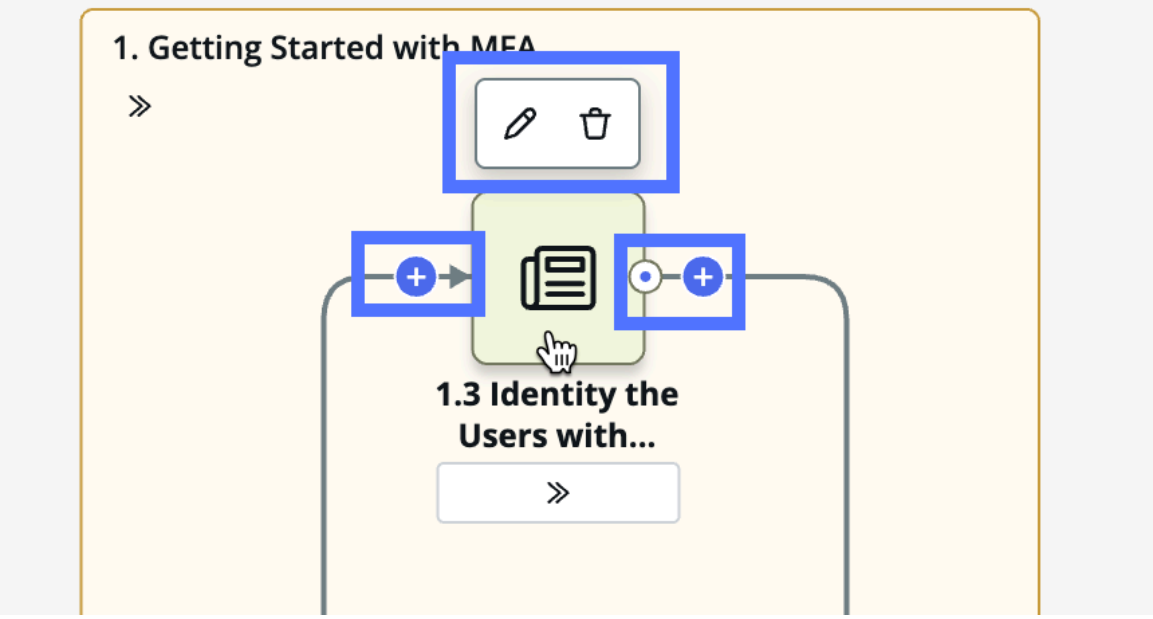
Configure accessibility preferences

View all buttons in a playbook diagram by default, without the need to hover or select any element.

Before you begin
Role required: none

About this task
When you hover over or select an element in the playbook diagram, buttons such as Edit, Delete, and others become visible. You can configure the user preferences to make the buttons visible by default, without hover or select.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Procedure

1. Navigate to **User menu** > **Preferences** > **Accessibility**.
2. Enable the option **Show all buttons without the need to hover**.
   To learn more about how you can make the UI most accessible for you, see Configure Next Experience accessibility preferences

Building Playbooks

Playbooks are ServiceNow AI Platform® representations of cross-enterprise processes for your organization. Create and activate a playbook to run your digitized business process on the ServiceNow AI Platform.

Each playbook that you design in Workflow Studio has a trigger, a sequence of stages, and a sequence of activities. To learn about the building blocks of a playbook and how you can create and manage a playbook, see:

- Understanding the playbook components
- Creating and managing Playbooks

Building your first playbook

Learn the basics of designing an automated process for your organization. Get an overview of how Workflow Studio Playbooks work in the ServiceNow AI Platform®.

Playbooks

Playbooks in Workflow Studio are ServiceNow AI Platform representations of your manual cross-enterprise workflows. By creating a Workflow Studio playbook on the platform, you're digitizing these workflows. A playbook in Workflow Studio has two dimensions: the playbook and their associated process executions.

Playbooks

A playbook is where a playbook owner configures and organizes multiple instances of Workflow Studio content into a coherent business process. A playbook consists of a trigger and a sequence of stages, which are made up of a sequence of activities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Process executions

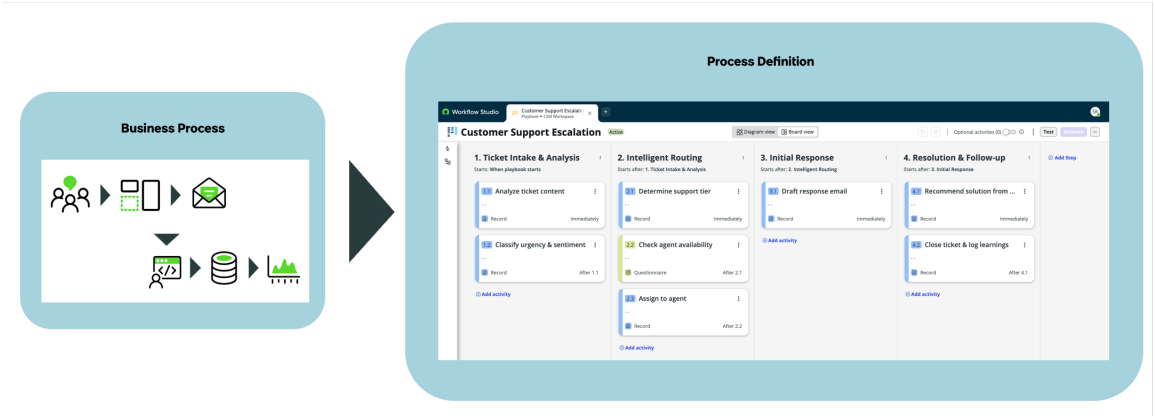
A process execution is a single, runtime instance of a playbook.

Building a playbook

When you design your business process in Playbooks, you're creating a playbook.

Each playbook consists of a trigger as well as stages and activities. Triggers define the conditions that, when met, start running your playbook. Stages and activities represent stages and individual steps in your overall business process. In the Playbooks design environment, you can organize these stages and Playbooks into a sequence that reflects how your business process runs.

When you're done creating your playbook, activate it so that it runs when triggered.



What happens when a playbook runs

When your activated playbook is triggered, the system creates a process execution, which represents a single, running instance of your playbook.

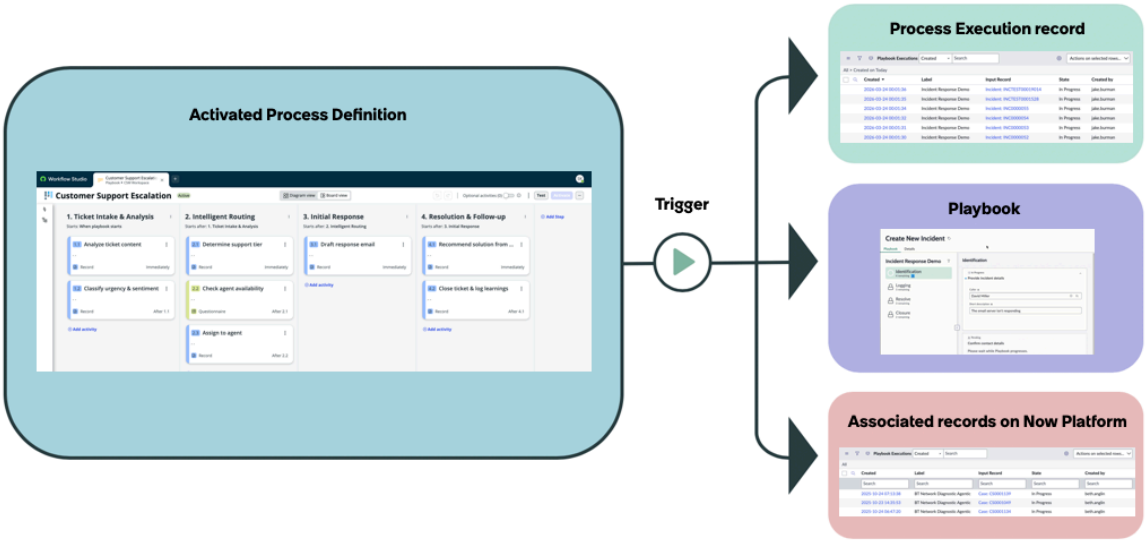
When your playbook starts running, a process execution is created. The system runs each activity in your playbook until the process execution is complete. As each activity runs, automated record operations occur on the ServiceNow AI Platform.

If an administrator has set up Playbook Experience for your playbook, then agents and fulfillers can run the playbook. Agent or fulfillers go through each activity in the playbook, which is associated with a record in a Workspace.

In summary, your playbook runs when:

1. The system creates a process execution.
2. Playbook Experience is configured and the playbook is rendered for agents.
3. Automated operations on records that are associated with your process execution occur on the ServiceNow AI Platform.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Learn more about Playbooks

If you're ready to start digitizing your business process with Playbooks in Workflow Studio, try checking out these resources:

- Create a sample playbook
- Create a playbook

Create a sample playbook

Create a sample playbook to standardize and automate how Service Desk agents handle chat interactions with VIP users.

Before you begin

- Role required: admin or playbook.admin

About this task

In the following procedure, you can step through an example of how to digitize a manual business process on the ServiceNow AI Platform using Playbooks in Workflow Studio to standardize and automate how Service Desk agents handle chat interactions with VIP users.

The manual business process for this example consists of the following stages:

1. *`Identify and Log`*: A Service Desk agent learns of an issue that a VIP user is facing while chatting with the user in a messaging application. The Service Desk agent creates an interaction record to track this issue.
2. *`Classify and Diagnose`*: The Service Desk agent associates an incident record with the interaction and sets the incident's priority to High. The agent then enters the Assigned To user for the incident.
3. *`Communicate Work in Progress`*: The assignee updates the incident record's state to Work in Progress and emails the VIP user when progress is made on the incident.
4. *`Resolve`*: When the incident is resolved, the assignee emails the resolution information to the VIP user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. Create a playbook named *Handle Interactions with VIPs*.

   a. Navigate to **All** > **Workflow Studio** > **Playbooks**.
   The Workflow Studio landing page opens with the Playbooks list displayed by default.

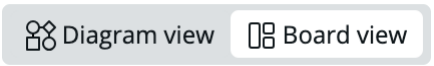
   b. In the upper-right corner, select **New** > **Playbook**.

   c. Fill in the following fields.

   Playbook fields

Field	Inputs
Playbook name	`Handle Interactions with VIPs`
Application	`Global`
Description	`This process defines how Service Desk agents can handle interaction records that are created for VIP users.`

   d. Select **Build playbook**.
   The builder displays in **Diagram view** by default, but you can select **Board view** to switch between views anytime as you build your playbook.

   The Playbooks design environment appears.

2. Specify the table.

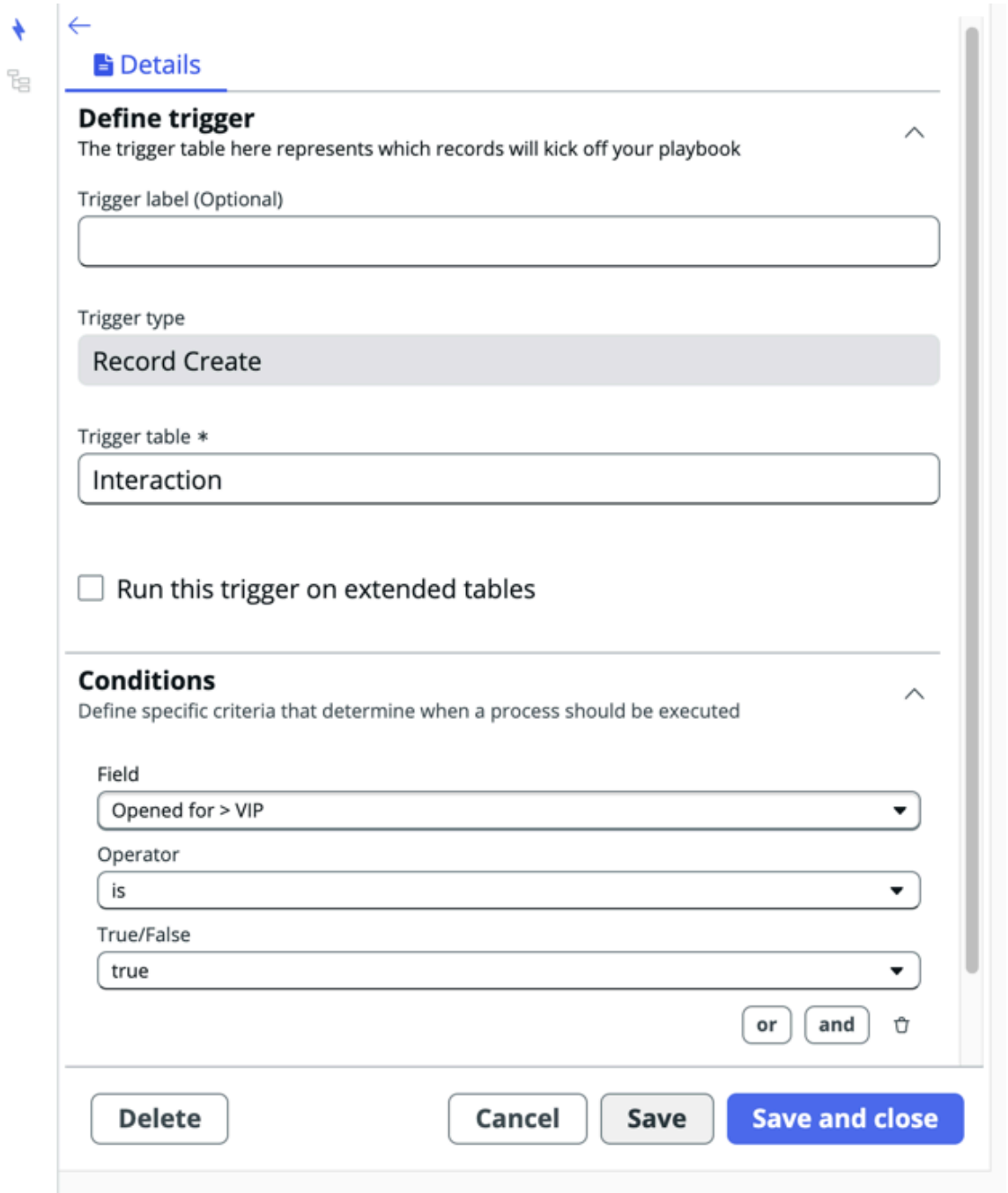
   a. Select the **Start** node.
   The Playbook properties side panel opens.

   b. In the **Parent table** field, enter and select `Interaction`.

   c. Select **Save and close**.

3. Create the trigger.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



a. Open the trigger panel .

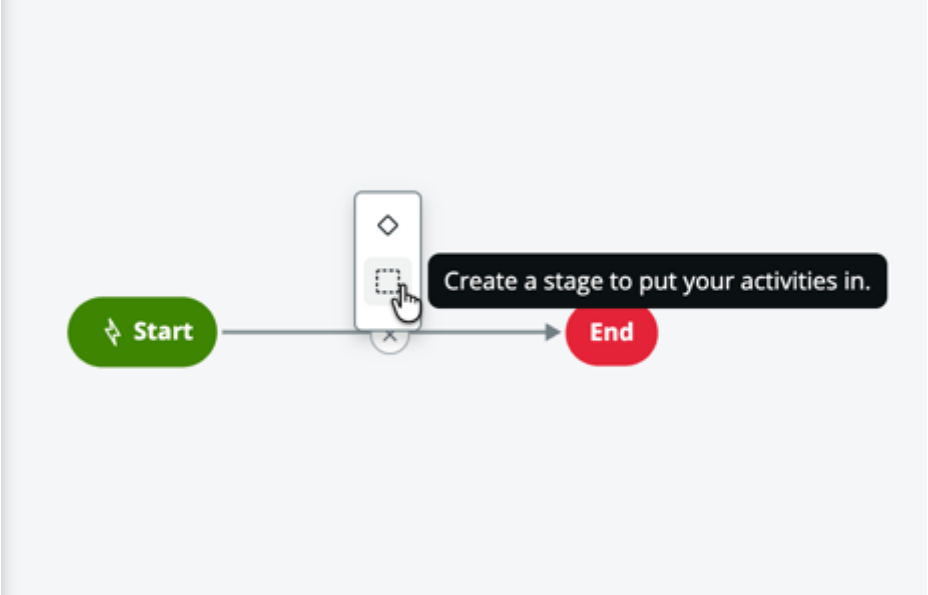
b. Select **Add trigger** > **When record is created**.
The trigger definition panel opens.

c. Under **Conditions**, use the condition builder to add the following condition.
[Opened for->VIP] [is] [True].

d. Select **Save and close**.

4. Add a stage for each phase of your process.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



a. Select **+** > **Add a stage**.
Repeat this step to add three stages.

b. Enter the **Label** and **Description** for each stage.

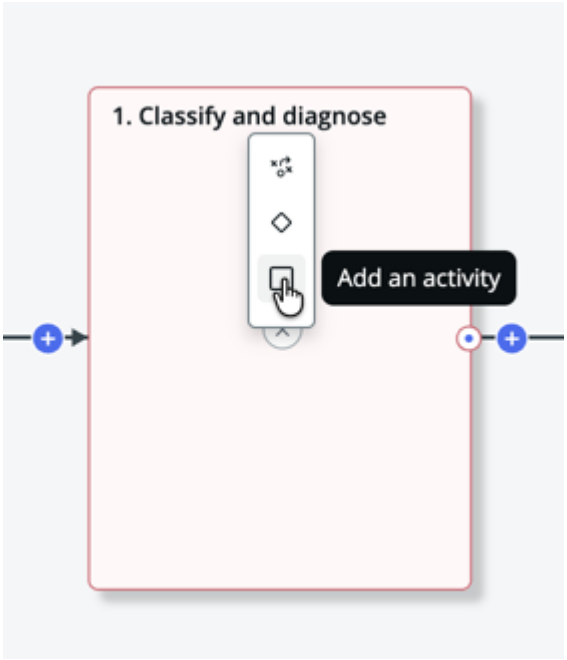
Stages to add

Stage	Label	Description
1	`Classify and Diagnose`	`Associate an incident with the interaction`
2	`Communicate Work in Progress`	`Notify VIP of work in progress`
3	`Resolve`	`Resolve incident and share resolution details`

c. Select **Save and close**.

5. Add the *`Create incident from interaction`* activity to the **Classify and Diagnose** stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



a. Under the **Classify and Diagnose** stage, select **+** > **Add an activity**.

b. In the activity picker, select **Common Activities** > **Non-Interactive** > **Create New Record**.

c. On the **Automation** tab, in the **Table Name** list, select **Incident [incident]**.

d. From the **Fields** list, select **Assigned To**.

e. Next to the **Assigned To** field, select the data pill picker icon ( ).

f. Dot-walk to **Context** > **Parent Record - interaction** > **Assigned To**.

g. Select **Add Field** and add the following four fields.

Fields and values

Field	Values to enter
Impact	`2 - Moderate`
Urgency	`1 - High`
Short Description	Dot-walk to **Context** > **Parent Record - interaction** > **Short Description**
Caller	Dot-walk to **Context** > **Parent Record - interaction** > **Opened for**

h. Select **Save and close**.

The **Create incident from interaction** activity automatically maps the Assigned To and Short Description fields from the interaction record to the incident record when your process runs.

6. Add the **Wait for assignee to update** activity to the **Communicate Work in Progress** stage.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Under the **Communicate Work in Progress** stage, select **+** > **Add an activity**.

b. In the activity picker, select **Common Activities** > **Interactive** > **Wait For Condition**.

c. In the activity properties panel's **Label** field, enter `Wait for assignee to update`.

d. On the **Automation** tab, in the **Table** list, select `Incident`.

e. Next to the **Record** field, select the data pill picker icon ( ).

f. Dot-walk to **1.1 Create incident from interaction** > **Incident records**.

g. Use the condition builder to add the following condition to your activity:
[Updated by] [is] [Activities > **1.1 Create incident from interactions** > **Incident record** > **Assigned to]**.

h. Select **Save and close**.

The **Wait for assignee to update** activity pauses the process until the Assigned To user for the Incident record updates the record.

7. Add the *`Send update to VIP`* activity to the **Communicate Work in Progress** stage.
   a. Under the **Communicate Work in Progress** stage, select **+** > **Add an activity**.
   b. In the activity picker, select **Common Activities** > **Interactive** > **Instruction**.
   c. In the activity properties panel's **Label** field, enter `Send update to VIP`.
   d. In the **When to start** field, leave **After Previous** selected, and then select **Save**.
   e. Click the **Send update to VIP** activity card.
   f. Select the **Automation** tab.
   g. In the **Message** field, enter `Notify the VIP user that work on their issue is in progress`.
   h. Leave the **Wait for user input** field's value as **Yes**.
   i. Select **Save and close**.
   The **Send update to VIP** activity prompts the agent to send an email to the VIP user when the assignee for the incident record makes an update.
8. Add the *`Wait for incident resolution`* activity to the **Resolve** stage.

a. Under the **Resolve** stage, select **+** > **Add an activity**.

b. In the activity picker, select **Common Activities** > **Interactive** > **Wait For Condition**.

c. In the activity properties panel's **Label** field, enter `Wait for incident resolution`.

d. Select the **Automation** tab.

e. In the **Table** field, select **Incident**.

f. Next to the **Record** field, select the data pill picker icon ( ).

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

g. Dot-walk to **Activities** > **1.1 Create incident from interaction** > **Incident record**.

h. Use the condition builder to add the following condition to your activity: **[State] [is] [Resolved]**.

i. Select **Save and close**.

The **Wait for incident resolution** activity pauses the process until the Incident's state becomes **[Resolved]**.

9. Add the *Share resolution details with VIP* activity to the **Resolve** stage.
   a. Under the **Resolve** stage, select **+** > **Add an activity**.
   b. In the activity picker, select **Common Activities** > **Interactive** > **Instruction**.
   c. In the activity properties panel's **Label** field, enter `Share resolution details with VIP`.
   d. Select the **Automation** tab.
   e. In the **Message** field, enter `Provide the Resolution Notes from the Incident record in an email to the VIP user`.
   f. Leave the **Wait for user input** field's value as **Yes**.
   g. Select **Save and close**.
   The **Share resolution details with VIP** activity prompts the agent to send the issue resolution details to the VIP user.
10. In the main header, select **Activate** so that your process runs when triggered.

Result

Your process appears in as a playbook. Here, agents and fulfillers can get a task-oriented view of the automated business process. Agents can step through the activities that you set up to see where the record is in the overall process.

What to do next

Customize the Playbook layout for deployment. To learn more, see Customizing the Playbook Experience

Understanding the playbook components

Understand the building blocks of a playbook and how to configure them when you create a playbook.

Each playbook consists of the triggers, stages, and activities. You can use variants to use one playbook for multiple scenarios.

Triggers

A trigger is an operation that tells your playbook to start a run. Each trigger has a type and conditions that must be met. Triggers only fire for record operations that are interactive or made by users. For more information, see Triggers.

Stages and activities

An activity represents one step in your business process, and the record for an activity is called an activity definition. Group activities by the stages of your business process, and sequence activities in an order that makes sense for your cross-enterprise workflow. For more information on stages, see Stages and activities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Variants

Create different variations on top of a base playbook for multiple use cases instead of duplicating and modifying playbooks, or relying on one-time workarounds that use complex run conditions and branching. For more information about variants, see Playbook variants.

Triggers

Triggers specify when to start running your playbook.

In Playbooks, triggers indicate when your playbook should start running. Each trigger has a type and conditions that, when met, start running your activated playbook.

You choose one or more triggers when you create a playbook in Workflow Studio. To add a trigger, start by choosing the trigger type. Then, set conditions and other options to refine your trigger so that it fires in a way that makes sense for your business process. Repeat if you want your playbook to run based on multiple triggers. For more information, see Create a process definition.

Note: You can also configure and activate a playbook without any trigger, if you're planning to only trigger the playbook via API.

If you don't see a trigger that fits your use case, you can also create your own trigger definition instead. For more information, see Create a trigger definition.

How triggers work

Trigger types

In your Trigger Definition [sys_pd_trigger_definition] record, you can choose a trigger type, which determines when your trigger fires. These trigger types represent record operations that can occur in the ServiceNow AI Platform®. The following trigger types are available in your instance by default:

Scheduled

The playbook runs on a schedule specified by the playbook author.

When record is created

The playbook runs when a user creates a record anywhere in the ServiceNow AI Platform.

When record is updated

The playbook runs when a user updates an existing record anywhere in the ServiceNow AI Platform.

When record is created or updated

The playbook runs when a user creates a record or updates an existing record anywhere in the ServiceNow AI Platform.

Note: Triggers only fire for record operations that are interactive, or made by users. Triggers don't fire for non-interactive record operations. For more information, see Non-interactive sessions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details

After you add a trigger to your playbook, you can then set conditions and other options that determine when and how your trigger fires.

Option	Action
Conditions	Use the condition builder to create field conditions for when your playbook runs. See Condition builder.
Run this trigger on extended tables	Select this option to trigger the playbook on tables that extend from your selected table. For example, if you enable this option and select the Configuration Item [cmdb_ci] table, your playbook runs when record operations occur on the Server [cmdb_ci_server], Computer [cmdb_ci_computer], and other extended tables. For more information, see Table extension and classes.
Trigger on unique change	Select this to trigger the playbook for every unique update to a non-system field even if the flow is currently running. The system stores a history of every change to a record and determines whether the change is unique. For example, if an incident record's **State** field changes from In Progress to On Hold, the playbook runs. However, if the **State** field then changes back to In Progress, the playbook doesn't run. **Note:** Playbooks that have a trigger that runs **For each unique change** can produce recursions when run in a non-interactive session. When such playbooks make a change to the trigger record, the change meets the playbook's trigger conditions and causes a recursion.

Design considerations

Refer to these design considerations when working with triggers:

Create unique filter conditions for record triggers on the same table

To prevent playbooks from overwriting each other, create unique filter conditions for each playbook that runs on the same table. If multiple playbooks on the same table have the same filter, there is no way to know the order in which the playbooks will run.

Avoid duplicating triggers used in Workflow Studio flows

Playbooks triggers do not override Workflow Studio triggers. For both applications, when the trigger conditions are met, the automated processes run.

Ignore records added or updated by import and update sets

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Record triggers ignore records that were added or updated by applying an update set or importing an XML file. These operations apply to the entire application or table instead of an individual record.

Create a trigger definition

Define the type of trigger that determines when to start running your playbook.

Before you begin

- Make sure to set your current application to the application that you want your playbook to run in. For more information, see Application picker.
- Role required: admin, playbook.admin, or pd_trigger_author

Procedure

1. Navigate to **All** > **Process Automation** > **Process Automation Administration** > **Trigger Definitions**.
2. In the context header, click **New**.
3. On the Trigger Definition form, in the **Label** field, enter any label for your trigger definition. This label appears as a trigger option when you Create a playbook.
4. Next to the **Trigger Type** field, click the lookup using list icon ( ).
5. In the Trigger Types list, select a trigger type to use for your trigger definition. Options include:

   Record Created

   The playbook runs when a user creates a record anywhere in the ServiceNow AI Platform.

   Record Updated

   The playbook runs when a user updates an existing record anywhere in the ServiceNow AI Platform.

   Record Created or Updated

   The playbook runs when a user creates a record or updates an existing record anywhere in the ServiceNow AI Platform.

6. Click **Next** to go on to the next step.
7. In the Table list, select a table whose record operations you want to trigger your playbook.
8. Under Condition, use the condition builder to add field conditions for when you want to trigger your playbook.
9. To trigger your playbook for tables that extend your selected table, select the **Run On Extended** check box.
   For more information, see Table extension and classes.
10. Click **Update** to finish creating your trigger definition.

Result

Your trigger definition is added to the Trigger Definition [sys_pd_trigger_definition] table. You can now select your preset trigger when you Create a playbook.

Add and configure a trigger in a playbook

Begin building your playbook by adding and configuring the trigger.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: playbook.admin or pd_author

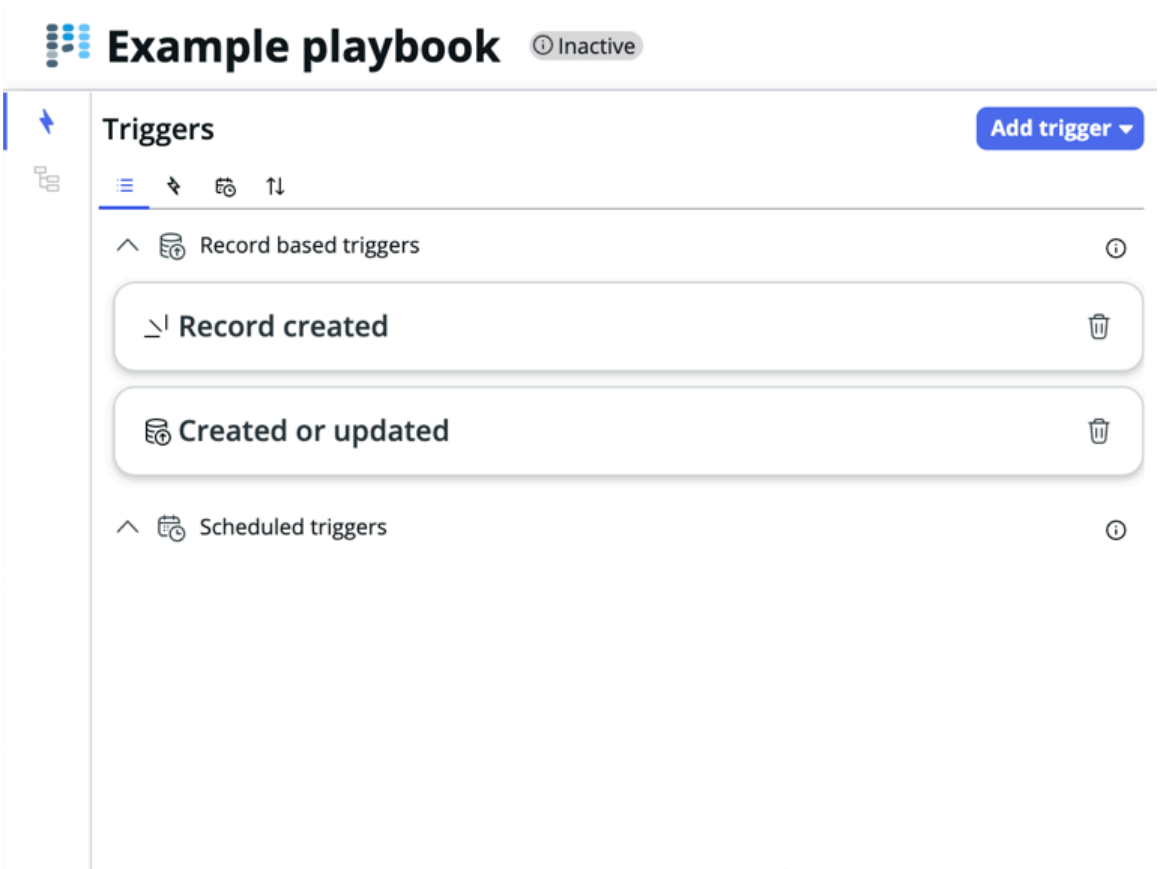
Review Triggers.

About this task
You can add one or multiple triggers to your playbook. The triggers can either be record based or scheduled. Record based triggers start your playbook when a record is created, updated, or both. The scheduled triggers give you the option to run the playbook at the time you need. You can also add an existing trigger that matches the conditions for your playbook.

Note: You can create up to 10 triggers of any type. It can be record-based triggers, scheduled triggers, or a combination of both.

Procedure
1. Navigate to **All** > **Process Automation** > **Workflow Studio** > **Playbooks**.
2. Open the playbook that you want to configure or create a playbook.
3. On the left sidebar, select **Triggers** ( ).

   Note: You can't open triggers until the parent table is specified for the playbook. To specify a parent table, edit **Start** in the diagram view, or open the **More actions menu** ( ) and select **Properties**.



   If triggers are already added to the playbook, the **Triggers** screen displays a list of the associated triggers. You can edit, delete, or add a trigger.

4. Select an existing trigger to edit, or add a trigger.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Trigger type	Actions
Record based	Go to **Add trigger** > **Record based** and select when you want the playbook to run: ○ When record is created ○ When record is updated ○ When record is created or updated Specify the following settings and select **Save and close**. **a.** If required, specify a different table for the trigger than the parent table. **b.** Select **Run this trigger on extended tables** if you want the playbook to run on Table extension and classes. **c.** Select **Trigger on unique values** if you want the playbook to run only on unique changes of the record values. If you edit and reactivate an existing playbook, the playbook may run automatically for a fulfilled trigger. To prevent the playbook from running again for the same trigger, select the trigger to run on unique values. **d.** Specify any additional conditions that should start the playbook. If you want to use a trigger that has all the conditions you need for your playbook, select **Choose existing playbook trigger**. Then, choose an existing trigger from the list and select **Save and close**.
Scheduled	**a.** Select **Add trigger** > **Scheduled**. **b.** Specify the scheduling details and the conditions for the trigger and select **Save and close**. For more information about scheduling a trigger, see Create a scheduled trigger for Playbook

Result
The trigger is configured.

What to do next
Add and configure your stages.

Create a scheduled trigger for Playbook

Create a scheduled trigger that starts your playbook at the required time and interval. You can schedule a trigger in any time zone, with or without an end date for the schedule.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

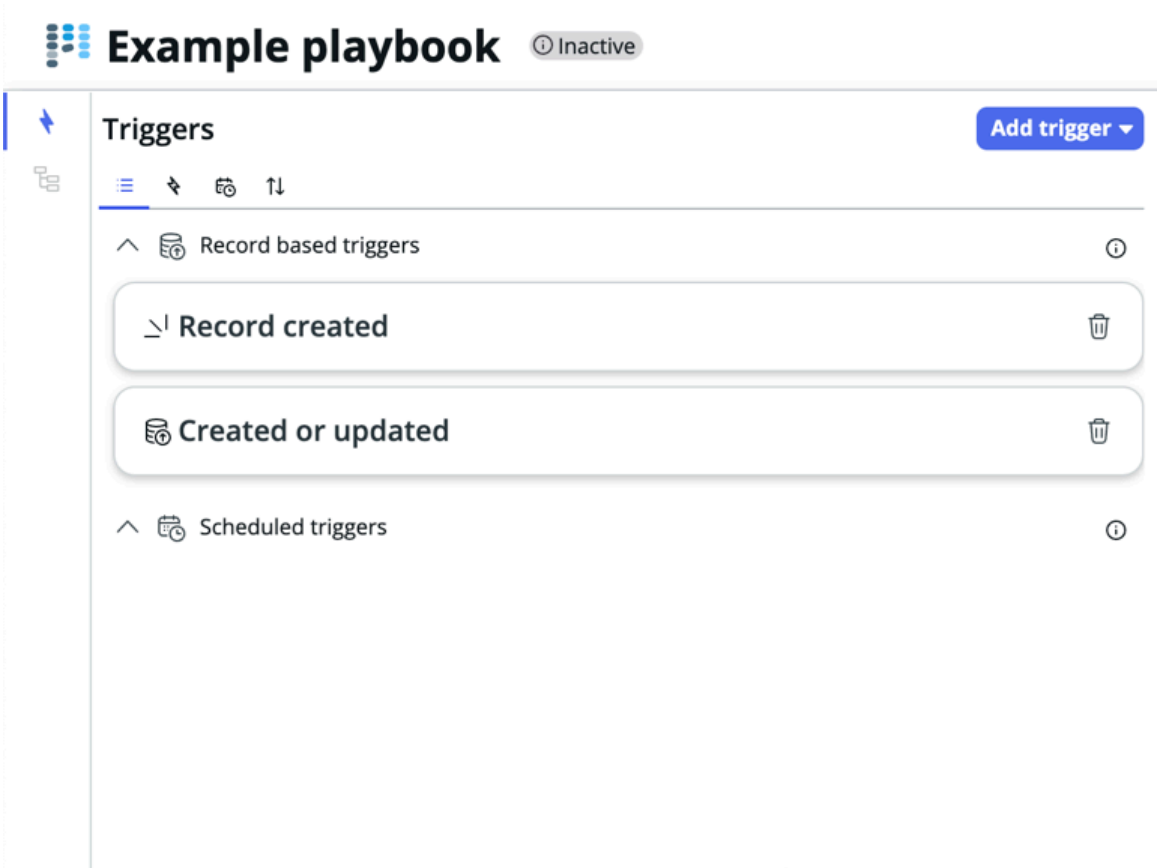
Before you begin

Role required: playbook.admin or pd_author

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio** > **Playbooks**.
2. Open the playbook that you want to configure or create a playbook.
3. On the sidebar, select **Triggers** ( ).

   Note: You can't open triggers until the parent table is specified for the playbook. To specify a parent table, edit **Start** in the diagram view, or open the **More actions menu** ( ) and select **Properties**.



   If triggers are already added to the playbook, the **Triggers** screen displays a list of the associated triggers. You can edit, delete, or add a trigger.

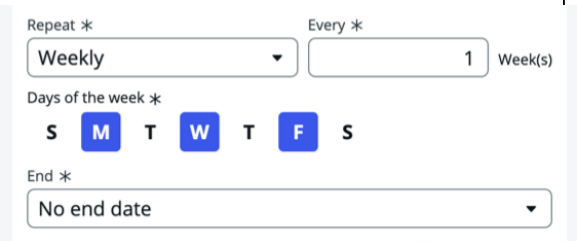
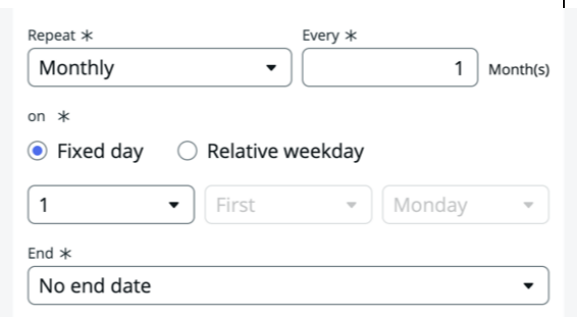
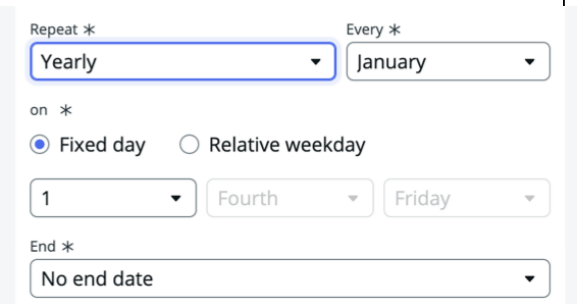
4. Select **Add trigger** > **Scheduled**.
5. Specify the scheduling details.

   a. Select the **Time zone** in which you want to schedule the trigger.

   b. Specify the **Start date and time** for the trigger.
   The date and time is as per the selected time zone.

   c. Use the **Repeat** and **Every** fields to define the schedule for the trigger.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
Daily	Runs every day or at your chosen interval of days. For example, everyday, every 2 days, every 3 days and so on.
Weekly	Runs every week or at your chosen interval of weeks. For example, every 2, 3, or 10 weeks.  Select on which days of the week you want the trigger to run. For example, every Monday, Wednesday, and Friday.
Monthly	Runs every month or at your chosen interval of months, for example, every 2, 3, or 24 months.  Select on which day of the month you want the trigger to run: ▪ **Fixed day**, for example, on the first day of the month. ▪ **Relative weekday**, for example, every first Monday of the month.
Yearly	Runs every year in the selected month. 

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
	Select on which day of the month you want the trigger to run: ▪ **Fixed day**, for example, on the first day of the month. ▪ **Relative weekday**, for example, every fourth Friday of the month.
Time interval	Runs at a specific time interval. Specify the interval in `hh:mm:ss` format. For example, you can create a trigger that runs every 47 hours and 30 minutes (47:30:00).
Does not repeat	Runs only once at the specified date and time.

d. If you want to end the schedule and stop the trigger from running after a certain date, from **End**, select **On this day**.

e. To end the schedule, specify an end **Date and time**.

6. **Optional:** Specify the conditions for the trigger to run.
   Use the **Conditions** tab to add a condition when the playbook should run. You can also limit the number of records to be processed, up to 1000, and sort the records by a field.
7. Select **Save and close**.

Result
Your scheduled trigger is created.

Related topics
Triggers

Stages and activities

In Playbook, an activity represents one step in your overall business process. You can sequence many activities together in the stages of your process.

Stages

Group activities by the stages of your business process, and sequence activities in an order that makes sense for your cross-enterprise workflow. A stage is made up of many sequenced activities that are grouped in a logical way. In the Playbooks Board view of the design environment, you can add a stage to your playbook by clicking **+ Add stage**. In the Diagram view, select the **+** icon on connectors (lines) to add a stage.

Activities

In Playbooks, an activity represents one step in your overall business process. In the system, an activity is one instance of an activity definition. For more information on activity instances and activity definitions, see the Playbook Experience and activity definitions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Adding an activity to your playbook

In the Playbooks Board view of the design environment, select **+ Add activity** to open the activity picker. In the Diagram view, select the **+** icon on connectors (lines) to open the activity picker. In the activity picker, you can search for an activity to add or select one from the list of Common Activities. To choose an activity for a custom application, first select the application and then select the activity from the resulting list within the picker.

Additionally, you can add an activity just using an automation asset.

If there isn't an activity that fits your use case, you can create your own activity definition to add to the activity picker. For more information, see create an activity definition.

Interactive and Non-Interactive activities

Activity categories include:

Interactive Activities

When an interactive activity runs, it prompts a user for input in your playbook as it runs. For more information, see Interactive activities.

Non-Interactive Activities

When a non-interactive activity runs, it runs entirely behind-the-scenes and requires no user input. For more information, see Non-Interactive activities.

Optional Activities

An optional activity can be inserted by agents and fulfillers during a playbook run. For more information, see Optional activities.

Stage and activity details

When you select an activity, the side panel should open. Under the **Details** tab of the side panel, you can add names, descriptions, and start rules to the stages and activities in your playbook. Click the show or hide additional options button to show or hide additional properties for your currently selected stage or activity. The basic details for each stage and activity include:

Label

You can enter a display name for your stage or activity. This name appears during playbook runtime.

> **Note:** Keep your stage and activity names brief, as the system truncates long names.

Description

Optionally, enter a description for your activity or stage. This description only appears within Playbooks and isn't visible during playbook runtime.

Start Rule

Under **Schedule** > **Start Rule**, select a start rule for when your stage should start running:

- **When process starts**: Your stage starts running as soon as the playbook starts.
- **After specific stages**: Your stage starts running after specified stage(s) have finished running.

Under **Schedule** > **Start Rule**, select a start rule for when your activity should start running:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- **When stage starts**: Your activity starts running as soon as its stage starts running. Your stage starts running when your playbook is triggered.
- **After specific activities**: Your activity starts running after specified activities have finished running.

Run condition

Conditions that must be met to run an activity or stage. You can use data from prior activities to build conditions.

Activity inputs

Under the **Automation** tab of the side panel, each activity has inputs you can configure:

- To change default inputs and outputs for the activity, open and edit the source flow in Workflow Studio by selecting the **Open link** icon ( ) next to the **Automation** field.

  For more information on how to work with the default inputs and outputs for activities in Playbooks, see Create an action as an activity automation plan.

  Note: You must have the appropriate user roles to access Workflow Studio and Workflow Studio. For more information, see User access to Workflow Studio flows.

- **Inputs** are data that you provide so that the activity runs and performs its function appropriately. For example, a Record activity that notifies a customer of an application rejection will have message inputs for the email address, subject, body, and more.
- Expected **Outputs** are displayed at the bottom of the Automation tab.

Creating static and dynamic values for activity inputs

You can add dynamic data to an activity input. Click the data pill picker icon ( ) and navigate, or dot-walk, to the data pill whose dynamic value you want to use when your activity runs. You can select dynamic data from fields in the input record. If your activity has a start rule of **After specific activities**, you can also select dynamic data from the outputs of other activities in your playbook. For more information on dot-walking to related fields and records on the ServiceNow AI Platform, see selecting fields on related tables using dot-walking .

Note: You can dot-walk to fields in a Reference but not in a Document ID or Sys ID.

The inputs for interactive activities typically provide data that renders in a playbook for an agent to interact with. The inputs for non-interactive activities can render in a playbook but don't require any user input in order to run. For more information, see Interactive activities and Non-Interactive activities.

Design considerations

Refer to these design considerations when working with stages and activities:

Keep ServiceNow AI Platform state models in mind when designing your playbook

Some record types already have state models that describe their life cycle. Use any existing state model as a template for the design of your playbook. For more information, see State Management .

Add and configure a stage in a playbook

Add and configure a stage in your playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

Role required: playbook.admin or pd_author

Review Stages and activities.

Procedure

1. Add a stage.

View	Steps
Diagram	**a.** Select the **+** icon after the trigger to add the first stage in your playbook. **b.** In the mini-picker, select the dotted square icon.
Board	In Board view, click **+ Add stage**.

Your new stage appears, and the Stage properties panel opens.

2. Fill in the following fields.

a. Provide the basic details of the stage.

Required inputs	
Label	Enter a unique, user-facing name for your stage. This name appears to agents and fulfillers during runtime of your playbook.
Description	Optionally, enter some descriptive details about your stage.
Run condition	After the stage starts, the stage runs only if specific conditions are met.
Start Rule	Choose when you want your stage to start running. Options include: ▪ **When playbook starts**: Your stage starts running as soon as the playbook starts. ▪ **After specific stages**: Your stage starts running after specified stage(s) have finished running.

b. Optional: Show additional options in the activity for even more granular control.

⚠ **Warning:** Changing the advanced property fields of an activity can potentially break your automation. Make sure you understand how the playbook and its activities flow before you make changes.

Option	Description
Display order	When there are multiple stages running at the same time, define the order in which stages appear during a playbook run.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
	Note: In Workflow Studio, this can also be helpful when viewing parallel activi ties in Diagram view.
Start with delay	Specify a duration of time to wait before run ning an stage whose start rule and conditions have been met. For more information, see Start with delay input properties.
Restart rules	Choose what this activity does when a play book is restarted: ○ **Skip on restart**: Skip this stage when the run is due to a restart. ○ **Run always**: Always run this stage, includ ing first runs. ○ **Skip on first run**: Skip this stage during the first run. For more information, see Configure restart for Playbooks.

3. Under the **Runtime permissions** tab, add sets of users, user groups, user criteria and roles, and define whether they can add optional activities to the stage or restart the stage and its activities.
4. Click **Save and close** to finish adding the stage to your playbook.
   You can continue to add more stages to your playbook and fill in fields as described in the previous steps. In the Board view, use the **Stage actions menu** ⋮ to add stages between existing stages.
   Stages are created.

What to do next

Add and configure your activities.

Activity definitions

Activity definitions describe how the activities in your playbook get the data that they need when your playbook runs.

Activity definitions provide default configurations and values for your activities so that they can run properly when your playbook is triggered. Each activity definition contains some basic configuration details, as well as an automation plan and activity experience.

The Activity Definition [sys_pd_activity_definition] table lists the definitions for the activities that you can add to a playbook in Workflow Studio. To access these activity definitions, navigate to **Process Automation** > **Process Automation Administration** > **Activity Definitions**.

Fields

Each activity definition record has these basic fields:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Label	Name of the activity to display to users in Workflow Studio.
Table	Name of the table whose records the activity can access as inputs. Typically, this table is either the Task [task] or Global [global] table.
Application	Application scope that the activity can run in.
Accessible From	Options include: • **All application scopes** - Users can access this activity from any application scope. • **This application scope only** - Users can access this activity from the application scope that you specify in the **Application** field only.
Required Roles	A list of user roles that are allowed to access activities that use this activity definition.
Description	Optional description for the activity.

Visibility for activity inputs

Activity designers can configure the visibility of each activity input.

Always show

Displays the input in the properties panel.

Show as additional property

Displays the input in the properties panel only when playbook authors select **Show additional options**.

Show as additional property for Playbook admins only

Displays the input in the properties panel when users with the playbook.admin role select **Show additional option**. The input is hidden for any other users.

Automation plan

Each activity definition has an automation plan. The automation plan for an activity definition specifies:

- The Workflow Studio flow or action, which drives the activity's automation
- The activity's inputs, which are the data that the activity needs to run your playbook

Activity experience

Each activity also has an optional activity experience. The activity experience specifies an experience type, associated record, and details for what data to render in the activity's associated playbook card. Activity experience configurations only apply to activities that you add to a playbook which has an associated Playbook user experience.

Experience type

An experience type defines the data, or properties, that describe how the activity renders as a playbook card at runtime. For example, a Record experience type

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

can display a title, tagline, description, footer, and service level agreement (SLA) information in the Playbook card. This information displays when your activated playbook runs. For more information, see UI Layouts.

Associated record

The associated record defines the record whose data can render within a Playbook card at runtime. The associated record is dynamic, which means that it changes frequently as the playbook progresses. You can use the data pill picker ( ) to map the associated record to output record data. The output record data is within the underlying subflow or action specified in the automation plan.

Data to render in the Playbook card

You can specify the data to render in the Playbook card in the sections under the Associated Record section. To add dynamic data to fields that render in this user-facing view, use the data pill picker next to a data field and navigate, or dot-walk, to the appropriate data pill. The data pill should point to data within the subflow or action specified in the activity definition's automation plan.

Note: An activity experience contains many sections where you can specify the data to appear within the Playbook card. These sections vary depending on the experience type that you select. For example, a Record experience type has Details, Form, Attachments, and Features sections, while a Knowledge experience type has Knowledge, Details, and Features sections. For more information, see UI Layouts.

Actions to render in the Playbook card

You can specify the Playbook actions that you want to render in an activity's Playbook card using the Playbook Experience Action Assignment Map related list. A Playbook action displays as a button in the Playbook card's footer. Playbook actions can run server scripts, dispatch client actions, or render UI components. For more information.

To add a Playbook action to your activity definition, select **New** in the Playbook Experience Action Assignment Map related list. Then, choose a Playbook action from the **Action Assignment** list. Next, choose a Playbook user experience that you want the Playbook action to appear in from the **Playbook Experience** list, and then click **Submit**.

AI agents

You can enable and configure AI Agents for all form-based activities. If you enable AI Agents for an activity definition, playbook authors can choose how to use AI Agents for the activity. The AI Agents can be used in either of the following modes:

Collaborative

The AI Agents generate and fill the values, then wait until a human reviews and approves the AI-generated value.

Autonomous

The AI Agents can update the record, complete the activity, and automatically move the playbook to the next activity. In the activity definition, you can specify which actions you want the AI Agents to perform autonomously. For example, you can remove the option for AI Agents to complete an activity autonomously.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Design considerations

Refer to these design considerations when working with activity definitions:

Avoid calling triggered Workflow Studio flows in an activity's automation plan

To prevent unintentionally running a flow outside of Playbooks, you can use only subflows or actions in activity automation plans. Alternatively, you can set the flow's trigger to only run if not already running. For more information, see Workflow Studio flow trigger types.

Specify default input values in your activity definitions

Preconfiguring default input values for your activity definitions reduces the time and complexity needed for a playbook owner to create a playbook.

Create an activity definition

Specify the action or subflow you want an activity to run. Configure the inputs you want playbook designers to set when adding the activity to a playbook. Select the experience you want end users to have when the activity runs.

Before you begin

- Create a Workflow Studio subflow or action that you want to use as the automation plan for your activity. For example, see Create an action as an activity automation plan.
- Make sure to set your current application to the application that you want your activity to run in. For more information, see Application picker.
- Role required: admin, playbook.admin, or pd_content_author

Procedure

1. To start creating a new activity definition, do one of the following:
   - Navigate to **Process Automation** > **Process Automation Administration** > **Activity Definitions**. Then in the context header, click **New**.
   - Follow the steps to Create a playbook. Then in the Playbooks activity design space, click **Add an activity** > **Create a new activity**.

   The Activity Definition form view appears.
2. Fill in the Activity Definition form fields.

Field	Action
Label	Enter a unique name for your activity. This name appears in the playbook in both the Workflow Studio Playbooks builder as well as during playbook runtime.
Table	Select a table whose records the activity can access as inputs. When adding inputs to your activity in the Workflow Studio Playbooks builder, you can dot-walk to dynamic record data from this table. See Dot-walking to data

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Action
	Note: The table specified for a play book's triggering input record overrides the activity definition table at design time. See Triggers
Description	Optionally, enter some descriptive details about your activity.
Accessible From	Choose one of the following options: ○ **All application scopes** - You can add this activity to a playbook in any application scope. ○ **This application scope only** - You can on ly add this activity to playbooks within the same application scope specified in the **Ap plication** field.
Required Roles	Add roles that are allowed to access activities that use this activity definition. **Note:** Users who can view the play book but who do not have the required role to access activities with this activity definition will have a read-only view of these activities.

3. Configure the **Automation Plan**.

   a. Next to the **Flow or Action** field, click the lookup documents using list icon ( ).
   The Select the document screen appears.

   b. In the Table Name list, select one of the following options:

   - To use a Workflow Studio subflow to automate your activity, select **Flow**.
   - To use a Workflow Studio action to automate your activity, select **Action Type**.

   Note: You can only use published actions or subflows for an activity definition's automation plan.

   c. Next to the **Document** field, select the lookup documents using list icon ( ).
   The Flows or Action Types screen appears.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

d. From the list, select the subflow or action that you want to use to automate your activity.

e. Select **OK**.

f. Right-click in the header of the activity definition, and select **Save**.
The system displays the available variables for the action or subflow. The Workflow Studio Playbooks builder displays a variable for each action or subflow input.

g. For each variable, configure the default value you want each variable to have.
Leave a variable blank when you want a playbook designer to configure the value when adding the activity to a playbook.

4. For each variable, select where it is visible.

Visibility	Description
Always show	Displays the input in the properties panel.
Show as additional property	Displays the input in the properties panel on ly when playbook authors select **Show addi tional options**.
Show as additional property for Playbook admins only	Displays the input in the properties panel when users with the playbook.admin role se lect **Show additional option**. The input is hid den for any other users.

Playbook designers can only set values for variables that they have access to.

5. Configure the **Activity Experience**.

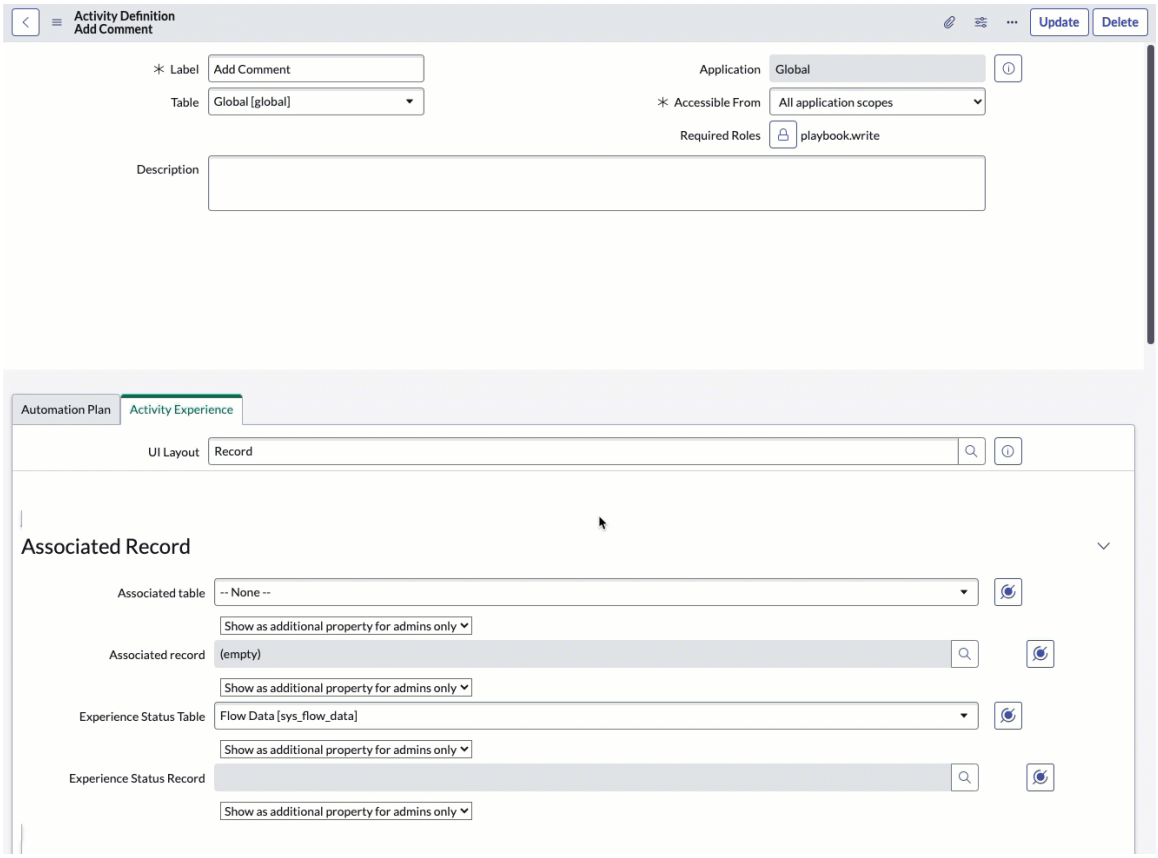
a. In the Activity Experience tab, next to the **UI Layout** field, select the list icon ( ).
The Activity UI Layouts list appears.

b. Select the UI Layout you want to use.

c. Right-click in the header of the activity definition, and select **Save**.

d. Under the Associated Record section, select values for the **Associated table** and **Associated record** fields.
These values are typically Record and Table Name outputs for the Workflow Studio subflow or action specified in your activity's automation plan. For example, you can click the data pill picker icon ( ) next to the **Associated record** field and dot-walk to the Table Name output by selecting **VL** > **Add Comment** > **Outputs** > **task** > **Approval**.
The system associates a record with your activity so that, when the activity runs, it knows which record's data to output.

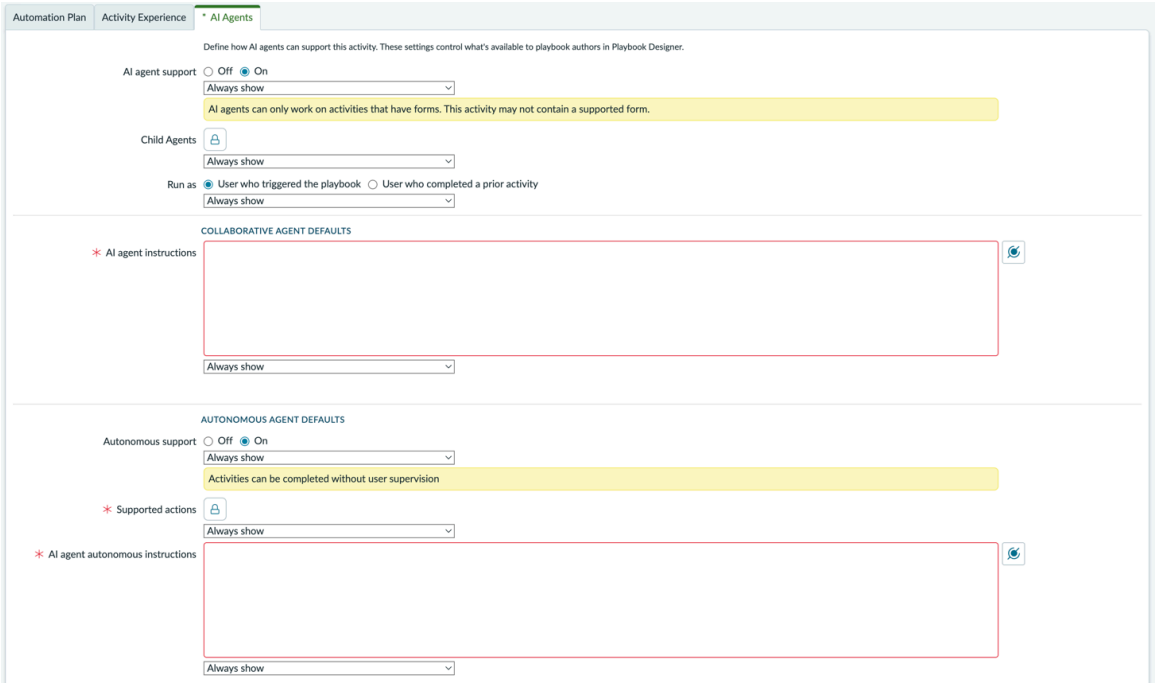
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



e. Optional: To set up the default activity data that renders in your playbook during runtime, enter the values for that data in the other sections under Activity Experience.
The sections and fields that appear under Activity Experience vary depending on the UI Layout that you select. For more information, see UI Layouts.

6. In the **AI Agents** tab, select **On** to enable AI agents for the activity.
AI Agents are supported for form-based activities. If you enable AI Agents for an activity, complete the following fields to configure the AI Agents.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



AI Agents configurations

Field	Description
Child Agents	Provides the option to add custom agents to the activity. To add custom agents to your activity, select the lock icon .
Run as	Lets you select the user on whose behalf the activity runs - the user that triggered the playbook or the user who completed a previous activity.
AI agent instructions	Adds default instructions for the AI Agents in the activity. The playbook author can update these instructions.
Autonomous support	Enables you to configure the AI Agents to complete actions autonomously, without human intervention. Use the **Supported actions** field to define the autonomous actions.
Supported actions	Specifies the actions that the AI Agents can perform autonomously in the activity. Select the lock icon and choose the actions to enable for autonomous support. ○ Update Record: The AI Agents can update records autonomously. ○ Create Record: The AI Agents can create records autonomously.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ Mark Complete: The AI Agents can autonomously mark the record complete. The playbook then proceeds to the next activity.
AI agent autonomous instructions	Adds default instructions for the autonomous AI Agents in the activity. The playbook author can update these instructions.

7. Select **Submit** to finish creating your activity definition.

Result
You can now select your custom activity from the activity picker in the Workflow Studio Playbooks design environment. Select the appropriate application scope for your activity to view it in the picker.

Create an action as an activity automation plan

Create an example action to configure and run as an activity from Playbooks.

Before you begin
Role required:

- This task requires some knowledge of creating flows in Workflow Studio environment. For more information, see Building flows.
- This task requires some knowledge of server-side scripting. For more information, see Server-side scripting.
- admin

About this task
Each activity definition requires an automation plan to run Workflow Studio content. The automation plan tells the Workflow Studio Playbooks builder what input values to use when running an action or subflow. An automation plan can specify static default values or can prompt playbook owners to provide dynamic values when they add an activity to a playbook.

In this example, you create a reusable Workflow Studio action to use as an activity's automation plan. The action you create associates a Task [task] record with a parent record.

Procedure

1. Navigate to **All** > **Process Automation** > **Flow Designer**.
2. In the main header, click **+ New** > **Action**.
   The Action Properties screen appears.
3. In the Action Properties screen, fill in the following fields:

Field	Action
Name	Enter `Associate Record with Parent`.
Application	Leave **Global** selected.
Accessible From	Leave **All application scopes** selected.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. Click **Submit**.
   The Workflow Studio design environment appears.
5. Under the Action Outline, click **Inputs**.
6. In the Action Input header, click **+ Create Input**, and then fill in the following fields:

Field	Action
Label	Enter `Record`.
Name	Enter `record`.
Type	Select **Reference.Task[task]**

7. In the Action Input header, click **+ Create Input**, and then fill in the following fields:

Field	Description
Label	Enter `Parent Record`.
Name	Enter `record`.
Type	Select **Reference.Task[task]**

8. Click the add a new step icon ( ).
   The Select Step to add screen appears.
9. Under ServiceNow Data, select the **Update Record** step.
   The **Update Record** step appears in the Action Outline under Inputs.
10. In the **Record** field, click the data pill picker icon ( ), and then dot-walk to **Inputs** > **Record**.
11. Under Field Values, click **+Add Field Value**, and then select **Parent** from the list.
12. Next to the **Parent** field, click the data pill picker icon ( ), and then dot-walk to **Inputs** > **Parent Record**.
13. Under the Action Outline, click **Outputs**.
14. Under Action Output, click **+ Create Output**, and then fill in the following fields:

Field	Action
Label	Enter `Record`.
Name	Enter `record`.
Type	Select **Reference.Task[task]**

15. In the Action Output header, click **+ Create Output**, and then fill in the following fields:

Field	Action
Label	Enter `Parent Record`.
Name	Enter `record`.
Type	Select **Reference.Task[task]**

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

16. In the Action Output header, click **Exit Edit Mode**.
17. Next to the **Record** output's Value column, click the data pill picker icon ( ), and then dot-walk to **Inputs** > **Record**
18. Next to the **Parent Record** output's Value column, click the data pill picker icon ( ), and then dot-walk to **Inputs** > **Parent Record**.
19. In the main header, click **Save** > **Publish** to make your action available to add to an activity definition's automation plan.

Result

You can now add your custom Workflow Studio action to an automation plan for your custom activity definition.

What to do next

Add your custom action to an automation plan when you Create an activity definition.

UI Layouts

A UI Layout describes what properties and components to use when an activity renders as a card in a Playbook Experience.

When creating an activity definition, you must select an UI Layout to associate your activity definition with. Playbooks come with the following UI Layouts that are available in your instance by default:

- Create Record
- Questionnaire
- Instructional
- Knowledge
- List
- Record
- Record generator

Depending on the UI Layout associated with the activity, different sections and fields appear under the activity definition's Activity Experience. These sections and fields let you set up the activity data that renders during the runtime Playbook Experience.

Note: All UI Layouts, except for Record generator, display an Associated Record section. For information on how to set up or edit the Associated Record section in an activity definition, see Create an activity definition.

Create Record

If you choose the Create Record UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

Displays the following fields:

- Associated table
- Associated record
- Experience Status Table
- Experience Status Record

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details

Displays the following fields:

- Tagline
- Icon
- Title
- Description
- Pending State Title
- Pending State Description
- Record fields
- Footer

Form

Displays the following fields:

- Form View
- Form fields
- Template Fields

Attachments

Displays the following fields:

- Attachment source
- Attachments read only

Features

Displays the following fields:

- Show SLA
- Show Checklist
- Is Automated

The Create Record activity that comes with the application uses this UI Layout.

In an activity definition

In Workflow Studio, the fields are configured on the UI Layouts tab of the side panel:

In Workflow Studio

In a running playbook, your configurations are reflected:

In a running playbook

Questionnaire

If you choose the Questionnaire UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Displays the following fields:

- Associated table
- Associated record
- Experience Status Table
- Experience Status Record

Details

Displays the following fields:

- Tagline
- Icon
- Title
- Description
- Pending State Title
- Pending State Description
- Record fields
- Footer

Form

Displays the following fields:

- Form View
- Form fields

Attachments

Displays the following fields:

- Attachment source
- Attachments read only

Features

Displays the following fields:

- Show SLA
- Show Checklist
- Is Automated

Instructional

If you choose the Instructional UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

Displays the following fields:

- Associated table
- Associated record
- Experience Status Table
- Experience Status Record

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Details

Displays the following fields:

- Tagline
- Icon
- Title
- Description
- Footer

Features

Displays the following field: Is Automated

Knowledge

If you choose the Knowledge UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

Displays the following fields:

- Associated table
- Associated record
- Experience Status Table
- Experience Status Record

Knowledge

Displays the following fields:

- Knowledge Table
- Knowledge Record

Details

Displays the following fields:

- Title
- Footer

Features

Displays the following field: Is Automated

List

If you choose the List UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

Displays the following fields:

- Associated table
- Associated record

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Experience Status Table
- Experience Status Record

Details

Displays the following fields:

- Tagline
- Icon
- Title
- Description
- Record fields

List Details

Displays the following fields:

- List Title
- Table
- List Query
- UI View
- Columns
- Max Columns
- Row Count

Features

Displays the following field: Is Automated

Record

If you choose the Record UI Layout, the following sections appear in the Activity Experience section for your activity definition:

Associated Record

Displays the following fields:

- Associated table
- Associated record
- Experience Status Table
- Experience Status Record

Details

Displays the following fields:

- Tagline
- Icon
- Title
- Description
- Pending State Title
- Pending State Description

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Record fields
- Footer

Form

Displays the following fields:

- Form View
- Form fields

Attachments

Displays the following fields:

- Attachment source
- Attachments read only

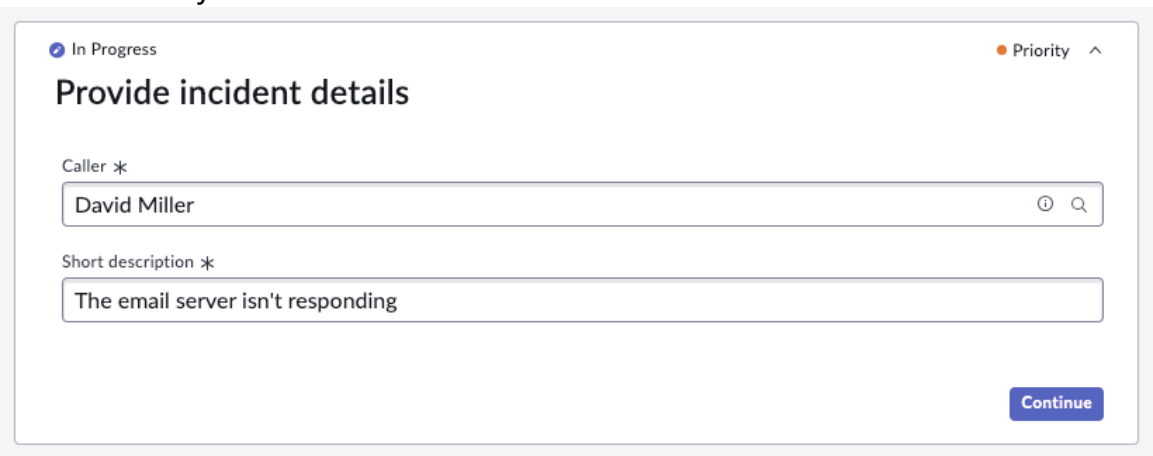
Features

Displays the following fields:

- Show SLA
- Show Checklist
- Is Automated

Record generator

Activities with a Record generator UI Layout create a record during runtime, and redirect users to the record. For example, in this activity, after an agent selects the **Continue** button, a record is created and they are taken to that new record.



If you choose the Record generator UI Layout, the following sections appear in the Activity Experience section for your activity definition:

- Template Fields
- Process Definition Scoped Name
- Associated Table
- Form View

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Guided Decision

Note: The Guided Decision UI Layout is available with a subscription to App Engine or Customer Service Management (CSM). For more information on how to enable this activity for use in Playbooks, see Activate Playbooks for Customer Service Management (CSM).

If you choose the Guided Decision UI Layout, the following fields appear in the Activity Experience section for your activity definition:

- Decision Tree Execution
- Decision Tree

Add and configure an activity in a playbook

Add and configure an activity in your playbook.

Before you begin

Role required: playbook.admin or pd_author

Review Stages and activities.

Procedure

1. Add an activity.

View	Steps
Diagram	**a.** Select the **+** icon in the first stage. **b.** In the mini-picker, select the square icon ☐ to add an activity. **c.** In the activity picker, search for an activity to add. **Note:** Select the application first, and then the activity from the result ing list.
Board	**a.** Select **+ Add activity** in the first stage. **b.** In the activity picker, search for an activity to add. **Note:** Select the application first, and then the activity from the result ing list.

Your new activity appears in the stage, and the Activity properties panel appears.

2. Under the **Details** tab, fill in the details of your activity.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Provide the basic details of the activity.

Required inputs	
Label	Enter a unique, user-facing name for your activity. This name appears to agents and fulfillers during runtime of your playbook.
Description	Optionally, enter some descriptive details about your activity.
Start Rule	Choose when you want your activity to start running. Options include: ▪ **When stage starts**: Your activity starts running as soon as its stage starts running. Your stage starts running when your playbook is triggered. ▪ **After specific activities**: Your activity starts running after specified activities have finished running.

a. Optional: Show additional options the activity for even more granular control.

⚠ **Warning:** Changing the advanced property fields of an activity can potentially break your automation. Make sure you understand how the playbook and its activities flow before you make changes.

Option	Description
Display order	Define the order in which this activity will ap pear during a playbook run.
Run condition	After the activity starts, the activity runs only if specific conditions are met.
Start with delay	Specify a duration of time to wait before run ning an activity whose start rule and condi tions have been met. For more information, see Start with delay input properties.
Restart rules	Choose what this activity does when a play book is restarted: ○ **Skip on restart**: Skip this activity when the run is due to a restart. ○ **Run always**: Always run this activity, includ ing first runs. ○ **Skip on first run**: Skip this activity during the first run. For more information, see Configure restart for Playbooks.

3. Open the **Automation** tab.
Automation, inputs, and outputs sections appear.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Automation

See or open the action, subflow, or flow that drives the activity.

Inputs

Configure inputs for the action, subflow, or flow that is driving the activity. Not all activities require user input.

Outputs

Outputs of the action, subflow, or flow that is driving the activity.

4. Under the **Inputs** section, define the values of the activity's inputs.

   Configure inputs with a hardcoded value, or by dot-walking to a data pill ( ) to use data from previous activities, the playbook trigger, from the playbook parent table, or from the playbook inputs.

   Tip: You can use both text and multiple pills in any other rich text or HTML input fields.

5. Open the **UI Layout** tab.

   Depending on the UI Layout associated with the activity, different sections and fields appear under the activity definition's Activity Experience. These sections and fields let you set up the activity data that renders during the runtime Playbook Experience.

   Note: All UI Layouts, except for Record generator, display an Associated Record section. For information on how to set up or edit the Associated Record section in an activity definition, see Create an activity definition.

6. **Optional:** Specify if an AI Agent performs the activity, and how.
   To learn more, see Configuring Agentic Playbooks.
7. Click **Save and close** to save the details of your activity.
   At any point while in the Playbooks builder, you can add more activities to a stage as described in the previous steps.
8. **Optional:** If the activity you want to add is not in the activity picker, create the activity definition.

   a. Under your stage, click **+ Add activity**.
   The activity picker appears.

   b. Click the **Create a new activity** button.

   c. Fill in the following fields.

Option	Description
Label	Enter a unique, user-facing name for your ac tivity. This name appears to agents and ful fillers during runtime of your playbook.
Accessible From	Where the activity is accessible from. Make the activity accessible to other applications by setting the **Accessible from** field to **All ap plication scopes**. Restrict access by setting the field to **This Application Scope Only**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
Table	Optionally, set to the table associated with the activity.
Application	Read-only field that indicates which applica tions can use this activity.
Description	Optionally, enter some descriptive details about your activity.
Automation Plan	Select the subflow or action that you want to use to automate your activity.
Activity Experience	Optionally, set the activity's experience type, which helps to define how the activity renders in user-facing views of a playbook card at run time.

9. Click **Submit** to finish creating your activity definition.
   Your activity is defined.

What to do next
Set up the Playbook Experience for you agents and fulfillers.

Use AI agent as an activity

Use an existing AI agent as an activity in your playbook to automate tasks. The AI agent gathers the required context, performs the work, and produces outputs that subsequent activities can consume.

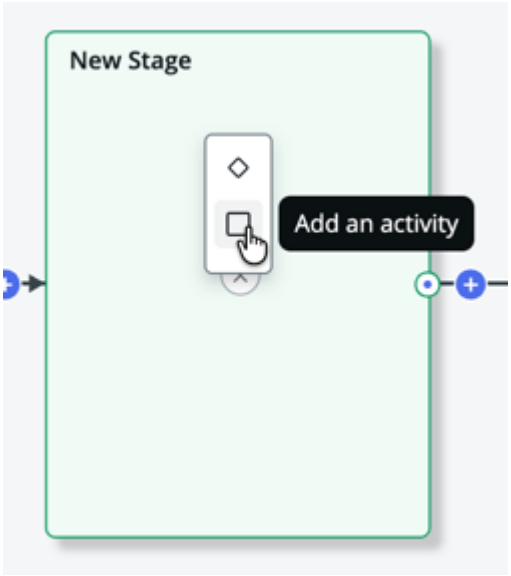
Before you begin
Make sure that ServiceNow Otto® AI agents plugin is installed and you have AI agents available in your instance. For information about installing the ServiceNow Otto® AI agents plugin, see Install ServiceNow Otto AI Agents. For information about creating an AI agent, see Create an AI agent.

Role required: playbook.admin or pd_author.

About this task
When you add an AI agent to the activity, you select the agent, provide an objective for the agent to complete, and define the expected outputs. You can also define whether you want to run the agent on behalf of the user who triggered the playbook, or the current user. You can interact with the agent from within the playbook, without opening the ServiceNow Otto® panel.

Procedure
1. Navigate to **All** > **Process automation** > **Workflow Studio**.
2. Select the playbook where you want to add the **Use an AI agent** activity.
3. In a new or an existing stage, select **Add an activity**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



4. From the list of activities, under **Common Activities**, select **Use an AI agent**.
5. In the **Automation** tab, configure the AI agent.

Use AI agent properties

Field	Description
AI agent	The AI agent that you want to add to the activity.
Objective	Text directions for the AI agent. You can use a combination of plain text and data pill picker. Provide a descriptive instruction for the AI agent about what do you want to achieve. For example, `Summarize the incident (Parent record->Incident->Number) and suggest the next steps to resolve the incident.`.
Run as	The user on behalf of whom you want the agent to run. ○ **Active user**: The AI agent performs the actions on behalf of the active user that starts the conversation. ○ **User who triggered the playbook**: The AI agent performs the actions on behalf of the user that triggered the playbook. ○ **User who completed a prior activity**: The AI agent performs the actions on behalf of the user that completed a previous activity.
Expected outputs	Outputs that you want the AI agent to generate.

6. **Optional:** Select **Show additional options** to configure the optional properties.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Optional properties

Assigned to	An optional field where you can specify a user who can complete, skip, or restart the activity when the agent is working. (Optional) This field is visible only when you select **Show additional options**.
Assignment group	An optional field where you can specify a user group who can complete, skip, or restart the activity when the agent is working. (Optional) This field is visible only when you select **Show additional options**.
Conversation label	A name to identify the conversation.

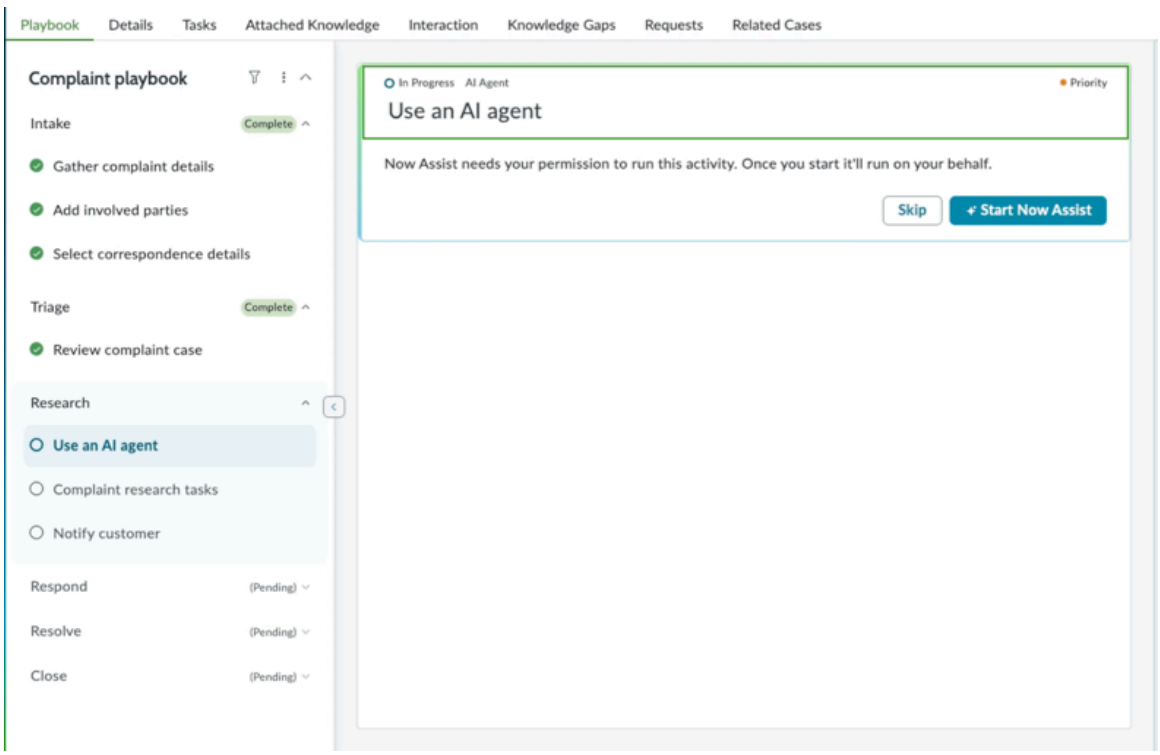
7. Select **Save and close**.

Example: Using AI agent in a CSM playbook

In the following example, Alex, a CSM/FSM Workspace user, is working on a customer complaint about a product issue. The playbook uses the Complaint Case Research Plan Agent in the research stage to analyze the complaint and create relevant tasks for the next steps. The AI agent is configured to run as the active user in this playbook.

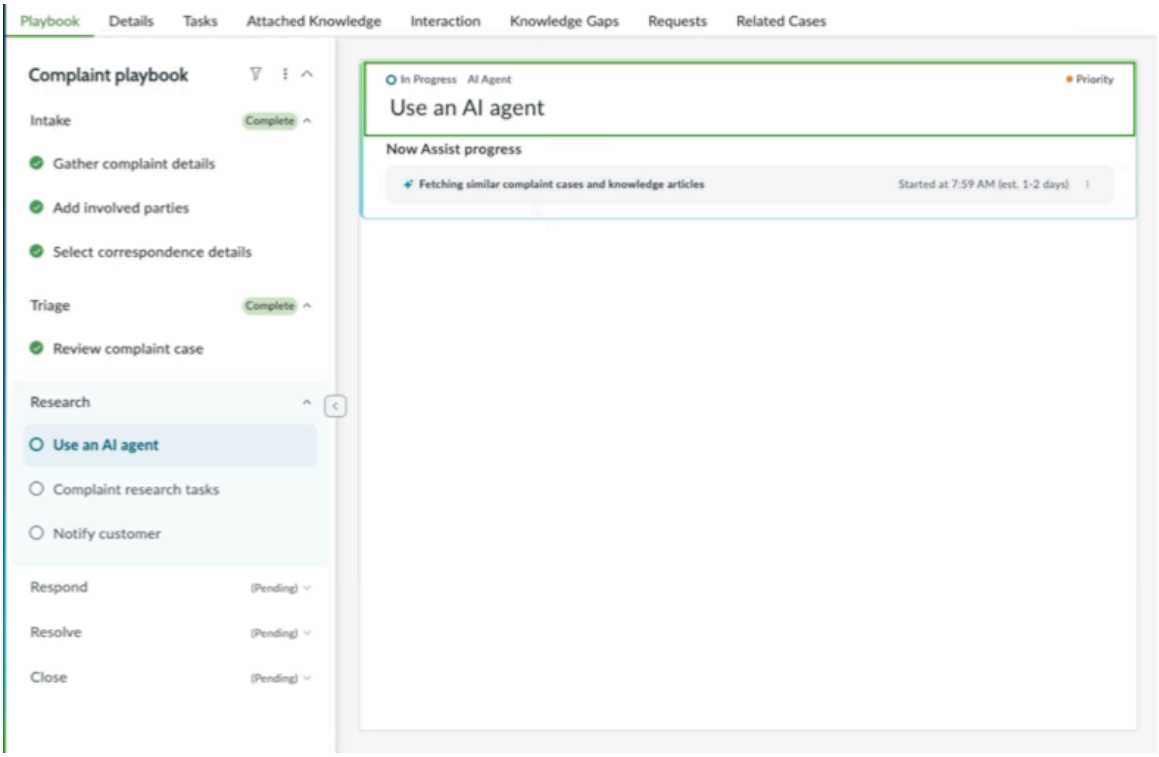
Alex performs all interactions with the AI agent within the playbook, without opening the Now Assist panel.

1. When the playbook reaches the research stage, Alex selects **Start Now Assist** to run the AI agent.

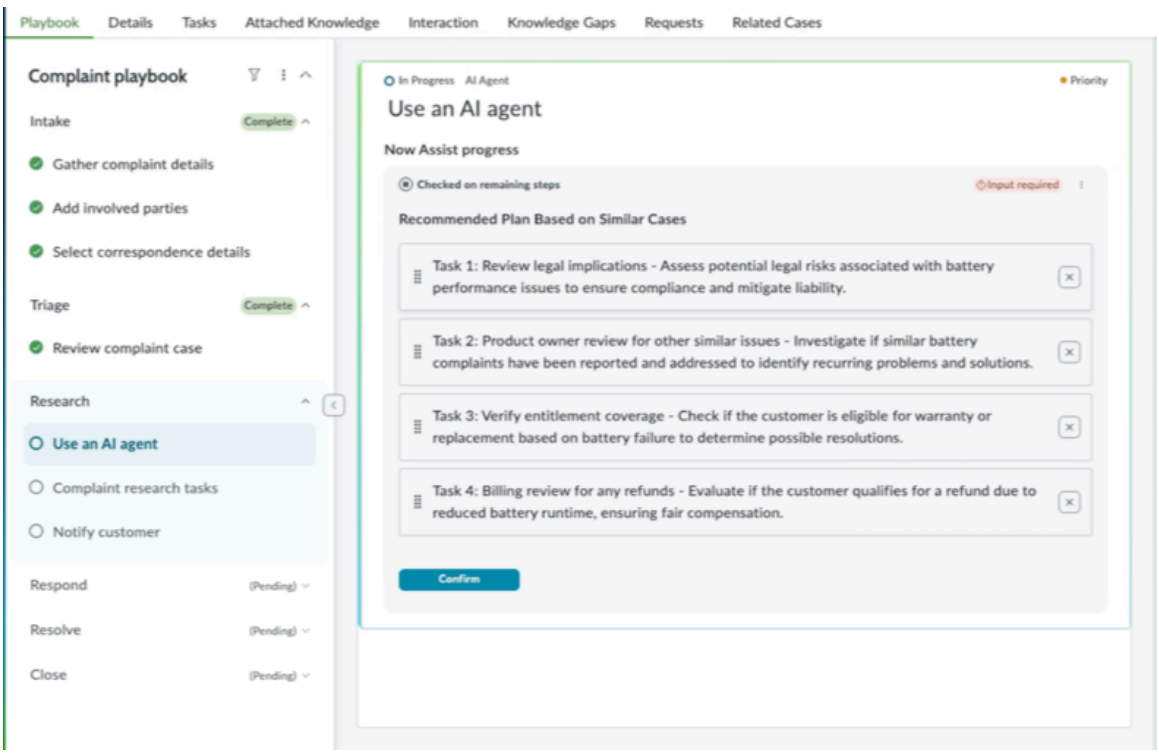


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

2. Alex can view the tasks that the AI agent is performing.

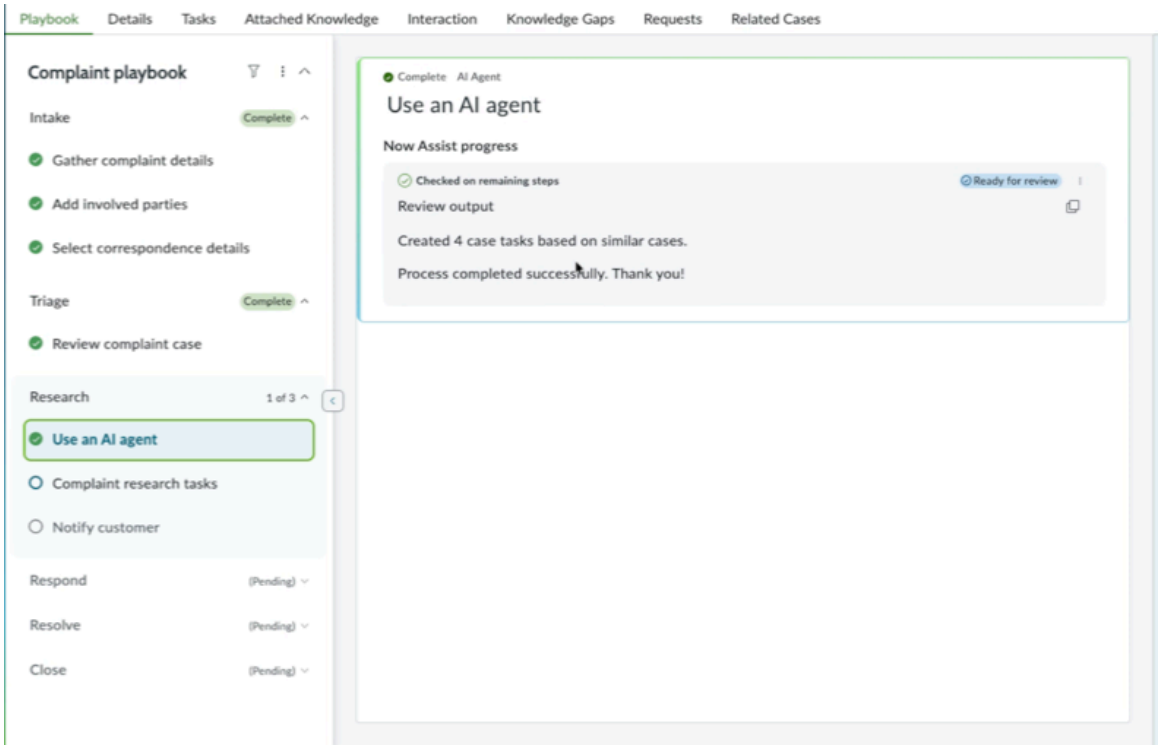


3. After analyzing the case and similar cases, the AI agent recommends adding four tasks and prompts Alex for confirmation. Alex can remove any of the recommended tasks or select **Confirm** for the AI agent to create the tasks.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. After receiving the confirmation, the AI agent creates the tasks and marks the activity as complete.



Use an AI skill as an activity

Use an existing AI skill as an activity in your playbook to perform lightweight, focused AI tasks. When the playbook reaches the activity, the skill runs, produces structured outputs, and passes those outputs to subsequent activities.

Before you begin

Make sure that the ServiceNow Call Now Assist Skill Step Plugin is installed.

Role required: playbook_admin or pd_author

About this task

AI skills handle lightweight, one-shot tasks such as sentiment analysis or text generation. Unlike AI agents, skills don't require full agentic orchestration. When you add a skill to an activity, the skill inputs load dynamically based on the skill you select. You can reference the skill output in downstream activities using the data pill picker.

You can add multiple **Use an AI skill** activities to the same playbook, each performing a different focused task. The outputs of each skill are available independently to subsequent steps.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Open the playbook where you want to add the Use an AI skill activity.
3. In a new or an existing stage, select **Add an activity**.
4. From the list of activities, under **Common activities**, select **Use an AI skill**.
5. In the properties panel, configure the activity.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the **Automation** tab, fill in the fields:

- **AI skill**: The AI skill that you want to add to the activity.
- **Inputs**: The input field loads dynamically based on the skill you select and is specific to that skill. For example, if it is a `Incident root cause analyzer` skill, provide a detailed description of the incident as input to the skill.

b. Select **Save and close**.

6. Reference the skill output in subsequent activities.

a. Add an activity where you want to reference the output, for example an instruction activity.

b. In the activity's Automation tab, open the data pill picker.

c. Select the output produced by the Use an AI skill activity.
You can chain multiple skill activities in the same playbook and reference each skill's output independently in the activities that follow them.

Skill outputs can also drive decision branching. You can configure a branch condition or playbook variant based on the value produced by a Use an AI skill activity.

What to do next

After authoring is complete, test and activate the playbook.

Automation Assets

Include all automation assets in the activity picker to add a subflow, flow, or action directly to your playbook without having to create an activity definition.

Use cases

Use automation assets in your playbook if:

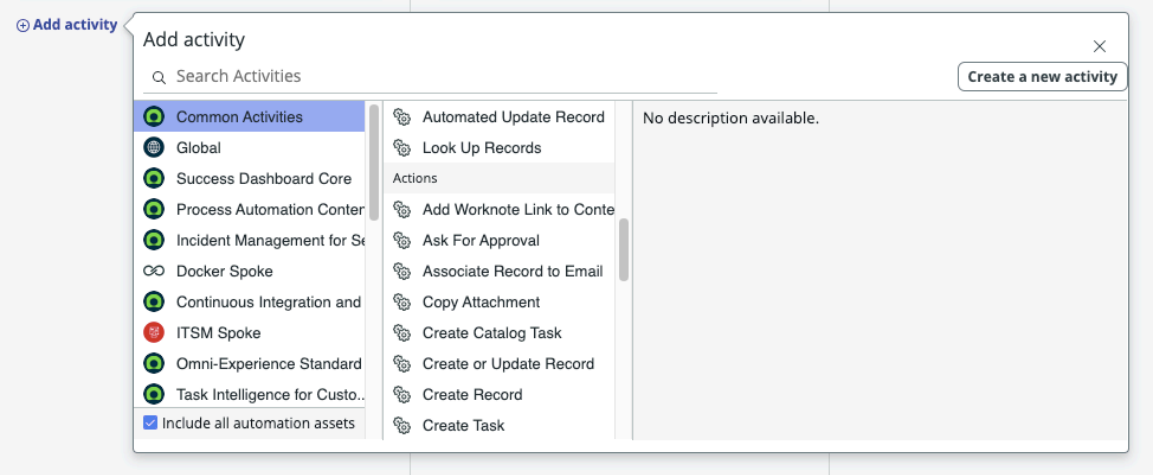
- You need an activity that only requires automation.
- The activity doesn't need to be reusable.
- You don't need a UI.

If you need a UI or an activity that is reusable, create an activity definition.

Asset types

When adding an activity, select **Include all automation assets** in the activity picker to add flows, subflows and actions.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



When adding a flow, subflow, or action, a non-usable activity definition is created behind-the-scenes.

Start with delay input properties

Specify a duration of time to wait before running an activity or a stage whose start rule and conditions have been met. Give users time to act during automated playbooks. Give users time to wait for a specific date and time to complete actions.

Roles and availability

This input is available for all stages and common activities, except for the Placeholder activity. Users with the admin, playbook.admin, pd_author, or pd_content_author can configure the properties of this input.

Input properties

Open the activity or stage properties panel, show additional options, and enable the **Start with delay** option to configure the following input properties.

Input	Type	Description
Duration Type	Choice	Option to specify how long of duration to wait. Options include • **Explicit Duration**: Wait for a specific time period, such as 5 minutes. • **Relative Duration**: Wait for a specific time period from a selected Duration data pill or date/time value, such as 5 minutes after the playbook starts. • **Percentage Duration**: Wait for a specific percentage of a time period between the start of the activity or stage

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Input	Type	Description
		and a specified end time, such as 50%. **Note:** The percentage value must be from **0** through **100** only.
Wait for	Template Value	Option to set a duration value manually or to select a Duration data pill from the data pill picker. • **Explicit Duration**: Wait duration in hours, minutes, and seconds. • **Relative Duration**: Wait duration in hours, minutes, and seconds before or after a specific time. Select **Relative Duration** to specify a wait duration from a specific date. **Note:** Past dates don't affect the wait duration. You can enter a wait value of up to 999 hours. **Note:** The actual wait duration can vary due to the instance processing time. The playbook always waits for the time that you specify for this field, but other work in the queue may add to the wait time.
Wait for Percentage	Integer	Percentage of time to wait from a specified end date before running an activity or stage. You can manually enter an end date or select a date/time data pill from the data pill picker. If you select an end date in the past, the wait duration is set to **0**. This field is only available when you set the **Duration Type** to **Percentage Duration**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Input	Type	Description
During the following schedule	Reference.Schedule [cmn_schedule]	Schedule used to calculate an end date that occurs during your hours of operation. For example, the calculated end date for a 10-hour duration that occurs during a 8-5 weekdays schedule will always be one or more business days in the future. If you leave this field blank, the calculated end date does not follow a schedule. For information on creating schedules, see Define a schedule.

Optional activities

Enable your agents and fulfillers to add additional activities as they go through a playbook.

Overview

Admins enable and add optional activities in the Workflow Studio Playbooks builder, while agents and fulfillers add and complete optional activities in Playbook Experience.

As an example, if you have a playbook for a Security Incident, a playbook admin could add an optional activity for a virus scan. When the activity runs, the optional virus scan activity would take the parent Security Incident record and run third-party virus scanning integrations on Configuration Management Database (CMDB) assets associated with the parent record. The security analyst can decide at runtime whether to run a virus scan based on their assessment of the situation.

The flow of working with optional activities:

1. Turn on and add optional activities to a playbook in Workflow Studio.
2. Optional activities are configured like other activities. To see design an automated process.
3. Agents add optional activities in Playbook Experience.

Add an Optional Activity to a playbook

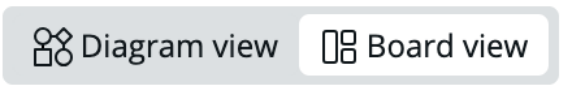
As a Playbooks administrator, add an optional activity to a playbook that Playbook Experience agents and fulfillers can choose to add and complete during the playbook runtime.

Before you begin

Role required: playbook.admin or pd_author

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio** > **Playbooks**.
2. Open the playbook that you want to add an optional activity to.
3. Switch to **Board view**.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. In the upper right-hand corner, toggle on **Optional activities**.

The optional activities swimlane opens.

5. Add an optional activity.
   Global optional activities can be inserted by the agent or fulfiller anywhere in the playbook, while a stage-specific optional activity can only be inserted within its specific stage.
6. Configure your activity the way that you would configure a regular activity.

Decision activities

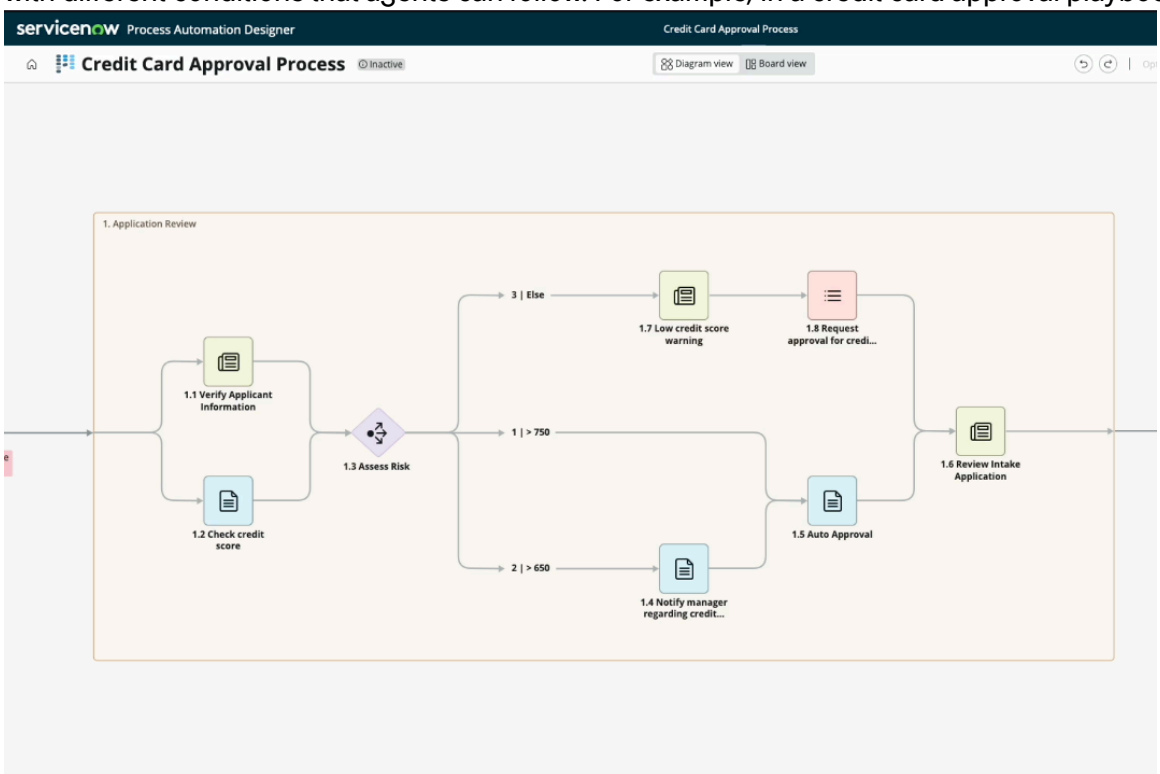
Create and define branches with different conditions for different paths between activities.

Before you begin

Role required: playbook.admin

About this task

Add a decision activity to create a decision tree between activities so that agents in Playbook Experience can troubleshoot if-then situations during runtime. Branches are the different paths with different conditions that agents can follow. For example, in a credit card approval playbook:



In this example, an agent can take different actions for different credit scores during a decision activity to assess the risk of a credit card applicant.

Decisions are also supported for stages. To learn more, see Decision stages.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

1. In Diagram view, hover on the object that you want to insert a decision activity next to, and select the **+** icon to add an activity.

   Note: Decision activities can only be added in Diagram view, but can be modified and viewed in Board view.

   The mini-picker displays.

2. Select the diamond icon ◇ to add a decision.
   A decision is added with two branches and the side panel opens for configuration.

3. Under the **Details** tab, fill in the following fields.

Decision details

Label	Enter a unique name for your activity. This name appears in your playbook during runtime.
Description	Optionally, enter some descriptive details about your activity.
Start Rule	Choose when you want your activity to start running. Options include: ○ **When stage starts**: Your activity starts running as soon as its stage starts running. Your stage starts running when your playbook is triggered. ○ **After specific activities**: Your activity starts running after specified activities have finished running.
Display order	Define the order in which this activity will appear during a playbook run.
Run condition	After the activity starts, the activity runs only if specific conditions are met.
Start with delay	Specify a duration of time to wait before running an activity whose start rule and conditions have been met. Give users a specific amount of time to complete actions. For more information, see Start with delay input properties.
Restart rules	Choose what this activity does when a playbook is restarted: ○ **Skip on restart**: Skip this activity when the playbook run is due to a restart. ○ **Run always**: Always run this activity, including first runs. ○ **Skip on first run**: Skip this activity during the first run. For more information, see Restart a playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

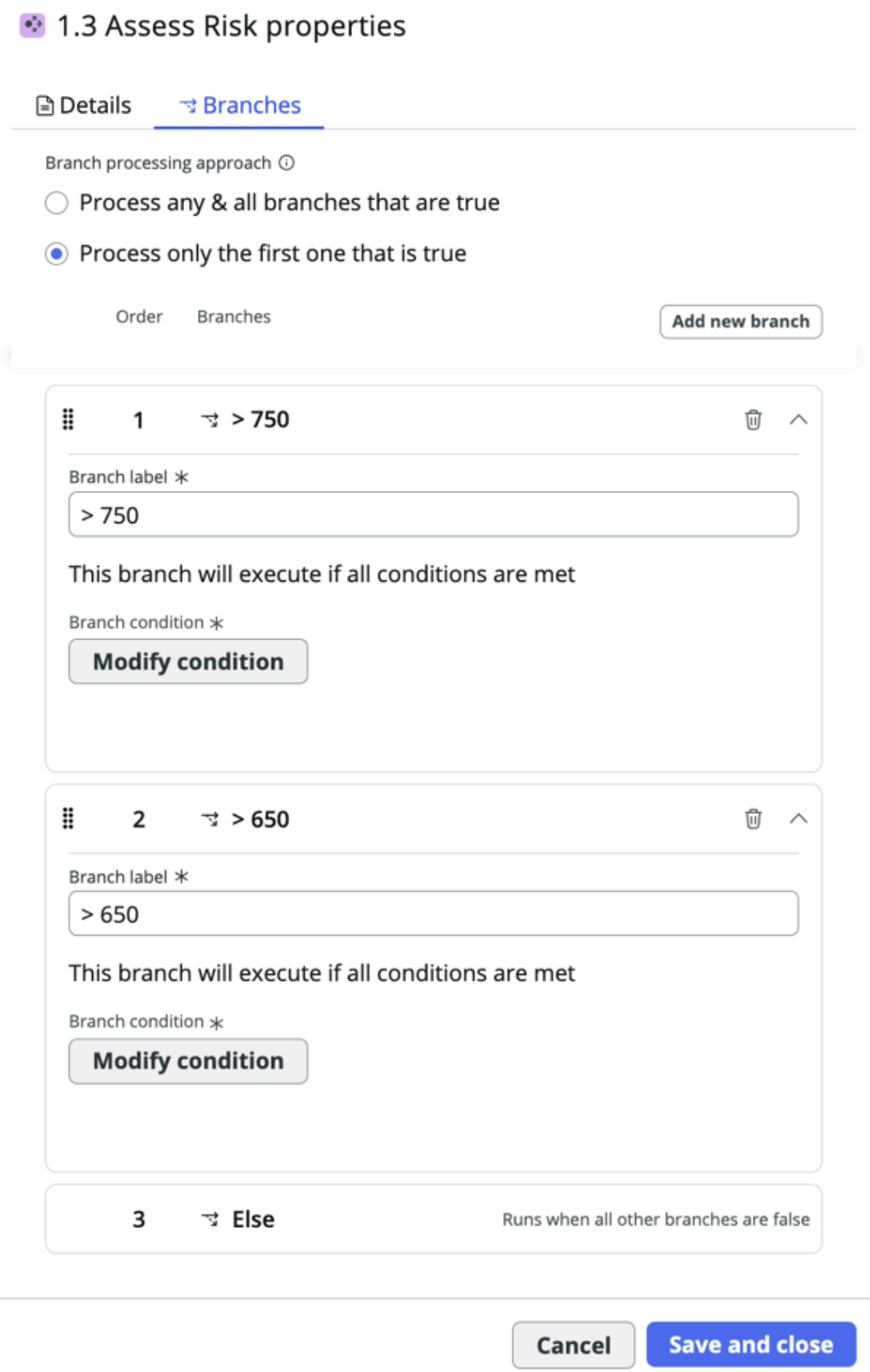
4. Under the **Branches** tab, select your new branch to begin configuring it.

   a. Give your branch a unique label.

   b. Select the **Add Condition** button.
   The condition builder displays.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Branches can only be added in the side panel.



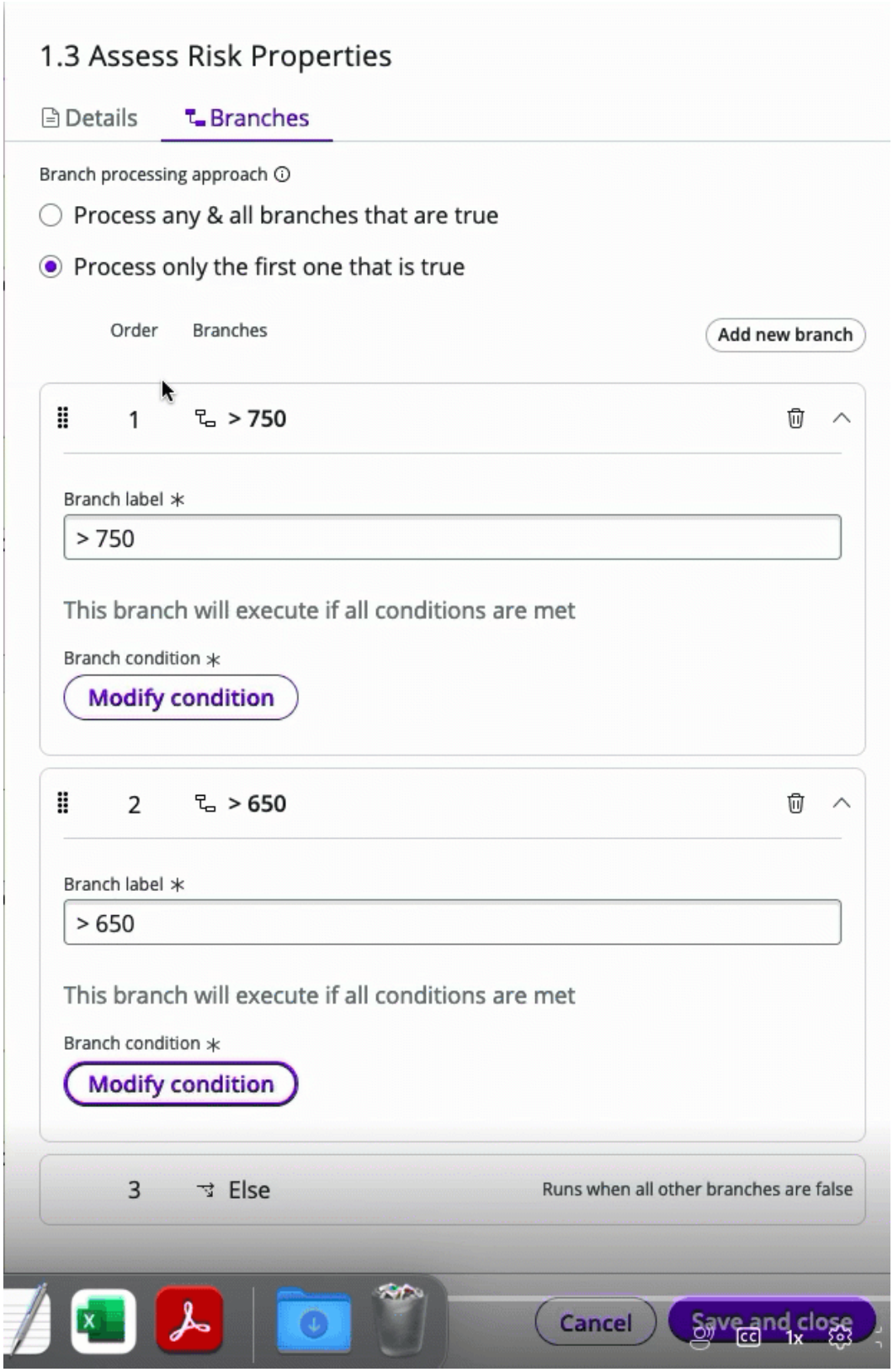
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

c. Select or enter a field, operator, and value.

5. Add more branches as needed.
   Branches can only be added via the side panel.
6. If you add two or more branches, select whether to process all branches with conditions that are met, or just to process the first listed branch with conditions met.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

7. If you selected to **Process only the first one that is true**, drag and drop the branch that you want to be evaluated to the top.



Result
You've added and configured decision branches between activities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Decision stages

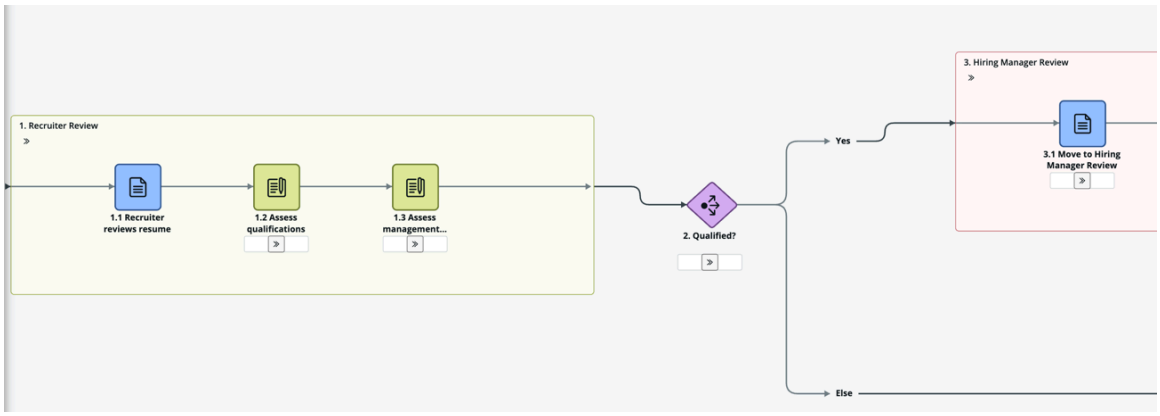
Create and define branches with different conditions for different paths between stages.

Before you begin

Role required: playbook.admin

About this task

Add a decision node between stages to determine which stage to run next, based on runtime conditions. For example, in a recruitment playbook, you can have multiple stages for each interview round and one disqualification stage. After each interview stage, you can add a decision to automatically select whether to run the next interview round or proceed to disqualification based on the completed stage.



Adding decision between stages help you achieve the following benefits:

Simplified authoring

Reduces the need to copy run conditions across stages.

Improved transparency

Makes branching logic more visible and easier to manage.

Enhanced runtime experience

Displays only the relevant stages to the end user, improving performance and clarity.

Procedure

1. In Diagram view, select the **+** icon.
2. From the mini-picker, select the diamond icon ◇ to add a decision.
   A decision is added with two branches and the side panel opens for configuration.
3. Under the **Details** tab, fill in the following fields.

Decision details

Field	Description
Label	Enter a unique name for the decision.
Description	Enter some descriptive details about the decision.
Start Rule	Choose when you want to evaluate the decision. Options include:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	○ **When playbook starts**: The decision starts running as soon as the playbook starts. ○ **After specific stages**: The decision starts running after specified stages have finished running.

4. **Optional:** Select **Show additional options** to specify the following optional fields:

Additional options

Field	Description
Display order	When multiple stages run at the same time, define the order in which stages appear during a playbook run. **Note:** In Workflow Studio, this can also be helpful when viewing parallel stages and activities in Diagram view.
Start with delay	(Optional) Specify a duration of time to wait before running a stage whose start rule and conditions have been met. For more information, see Start with delay input properties.
Restart rules	Choose what this activity does when a playbook is restarted: ○ **Skip on restart**: Skip this stage when the run is due to a restart. ○ **Run always**: Always run this stage, including first runs. ○ **Skip on first run**: Skip this stage during the first run. For more information, see Configure restart for Playbooks.

5. Under the **Branches** tab, select your new branch to begin configuring it.

   a. Give your branch a unique label.

   b. Select the **Add Condition** button.
   The condition builder displays.

   c. Select or enter a field, operator, and value.

6. Add more branches as needed.
   Branches can only be added via the side panel.
7. If you add two or more branches, select whether to process all branches with conditions that are met, or just to process the first listed branch with conditions met.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. If you selected to **Process only the first one that is true**, drag and drop the branch that you want to be evaluated to the top.
9. Select **Save and close**.

Result
You've added and configured decision branches between stages.

What to do next
Complete and test the playbook. For more information, see Test a playbook.

Questionnaire activity

Collects inputs from a user during a playbook run to use later in the playbook.

The questionnaire activity replaces the Collect User Data activity, but does not require you to create a data definition. Use the questionnaire activity if:

- You don't have a table already,
- You don't need to run reports on the collected data,
- And you don't need to use the data outside of the playbook.

If you already have a table to store the collected data, use the Record Form activity.

Roles and availability

This activity is available as a common activity. Users with pd_author can add this activity to a playbook.

Questionnaire

In the **Questionnaire** tab, you can:

- Add and edit questions for agents to respond to

  Note:

  Editing a questionnaire changes the activity definition. Playbook executions already in progress continue to use the questionnaire as it was when the execution started.

- Control which user or user group has access to submit the questionnaire

To learn more about adding or configuring questions, see Create a new questionnaire.

Editing

Required questions and skipping

Runtime users can skip a questionnaire activity. Required questions are validated when a user submits the questionnaire, not when they skip it. If a user skips the activity, nothing is submitted and no validation runs. Marking a question as required doesn't prevent a user from skipping the activity.

To require that users complete a questionnaire, remove the skip action from the activity. Marking questions as required doesn't achieve this on its own.A questionnaire displays as read-only if it has no submit action. An action counts as a submit action when **Form fields required** is selected on it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Outputs

These outputs can provide data to other activities in your playbook. You can access this data as activity inputs when you configure your activity:

Output	Type	Description
Record	Reference.Flow Data	Reference to record containing collected data. Use the pill-picker to dot-walk to **Outputs** > **Record** > **Vars** to see all collected data. To learn more about the pill-picker, see Dot-walking examples.

Create a questionnaire

Create and insert a new questionnaire for agents to respond to.

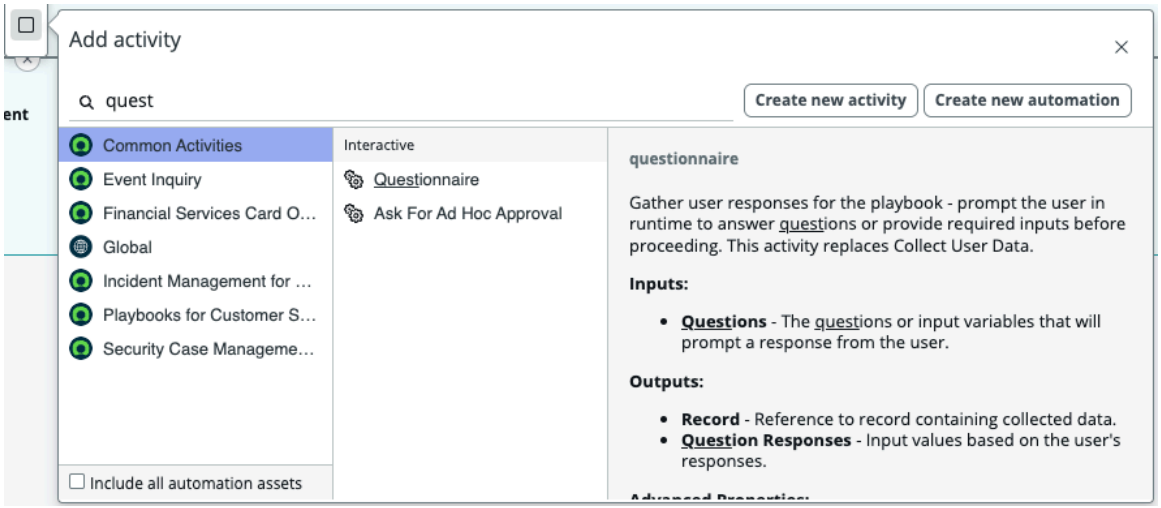
Before you begin

Role required: admin, playbook_admin, playbook_author, or playbook_content_author

Familiarize yourself with the questionnaire activity inputs and outputs.

Procedure

1. In diagram view, hover on the object that you want to insert a questionnaire activity next to, and select the **+** icon to add an activity.
2. In the mini-picker, select the square icon ☐ to add an activity.
3. Under **Interactive**, select **Questionnaire**.

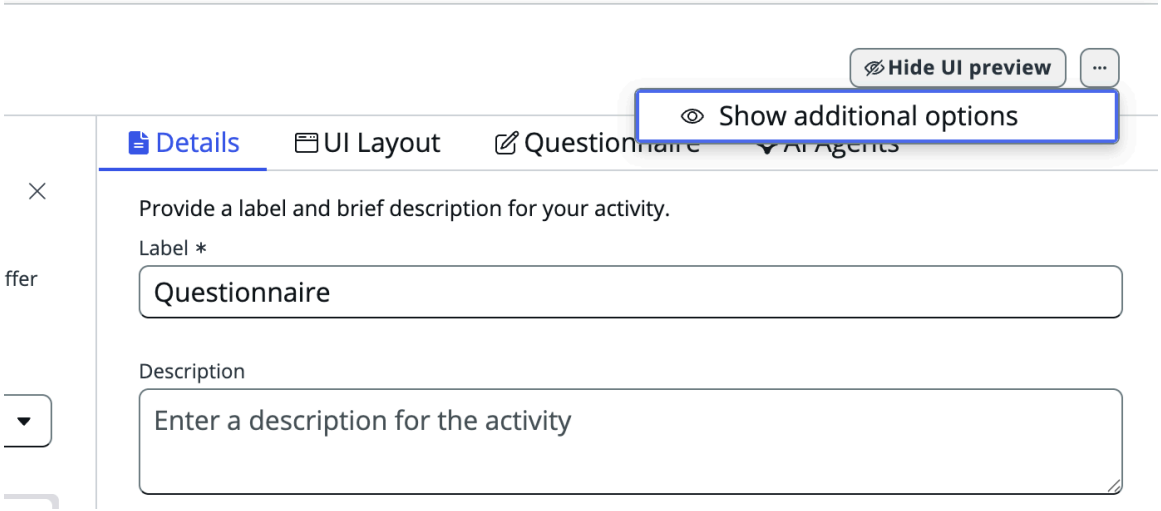


A questionnaire activity is added and the side panel opens for configuration.

4. **Optional:** Under the **Details** tab, select the More Menu icon ⋯, and **Show additional options** to view all fields.

Note: **Display order**, **Start with delay**, and **Run condition** fields are hidden by default.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



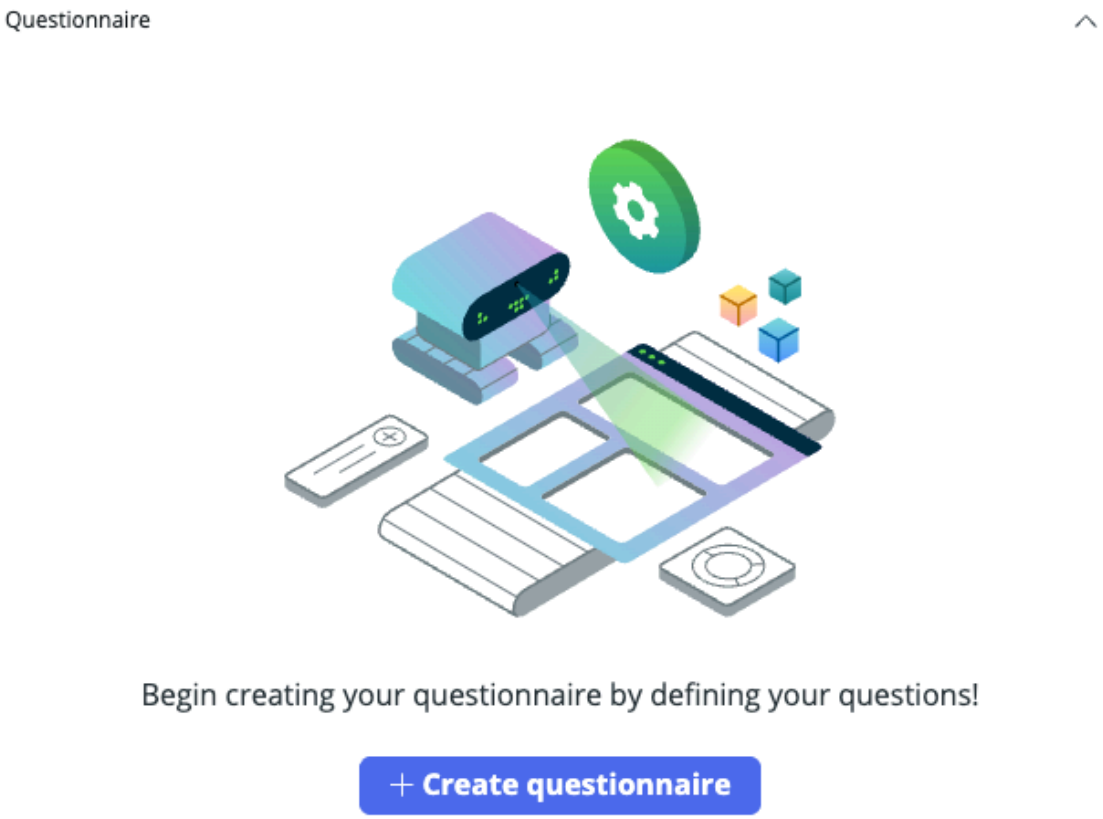
5. Fill in the following fields.

Label	Enter a unique name for your activity. This name appears in your playbook during runtime.
Description	Optionally, enter some descriptive details about your activity.
Start Rule	Choose when you want your activity to start running. Options include: ○ **When stage starts**: Your activity starts running as soon as its stage starts running. Your stage starts running when your playbook is triggered. ○ **After specific activities**: Your activity starts running after specified activities have finished running.
Display order	Define the order in which this activity will appear during a playbook run. This field is hidden by default.
Start with delay	Specify a duration of time to wait before running an activity whose start rule and conditions have been met. Give users a specific amount of time to complete actions. This field is hidden by default. For more information, see Start with delay input properties.
Run condition	After the activity starts, the activity runs only if specific conditions are met. This field is hidden by default.
Restart rules	Choose what this activity does when a playbook is restarted:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

	○ **Skip on restart**: Skip this activity when the playbook run is due to a restart. ○ **Run always**: Always run this activity, including first runs. ○ **Skip on first run**: Skip this activity during the first run. For more information, see Restart a playbook.

6. Under the **Questionnaire** tab, select **Create questionnaire**.



7. Add questions to the questionnaire one at a time.

   a. Select **Add question**.

   b. Enter your **Question**.

   c. **Optional:** Toggle the **Required question** to make the question optional.

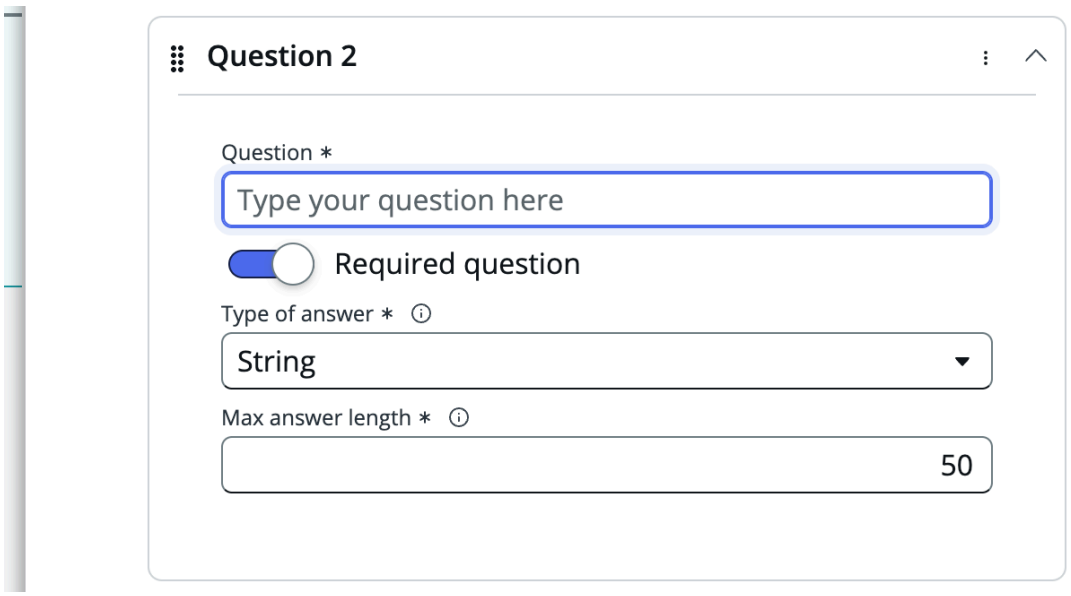
   > **Note:** Marking a question as required means the user must answer it before submitting the questionnaire. It doesn't prevent the user from skipping the activity. For more information, see Questionnaire activity.

   d. Select a **Type of answer** for this question.
   Each answer type may have its own specific additional required configurations.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

e. Enter a **Max answer length** to set the maximum number of characters a user can enter for their answer during runtime.

f. **Optional:** Repeat step 5 for all the questions you want to add.



8. Select **Save and close** to complete the questionnaire.

9. **Optional:** In the canvas, hover over the questionnaire activity and select the Edit icon . You can add, reorder, and remove questions, and change the options available on a question.

Note:

Editing a questionnaire changes the activity definition. Playbook executions already in progress continue to use the questionnaire as it was when the execution started.

Go back activity

The Go back activity defines a conditional return point in a playbook, enabling the playbook to loop back to an earlier activity, stage, or the start of the playbook based on an outcome.

The Go back activity lets you define a conditional return point in a playbook. When an agent or fulfiller reaches a Go back activity during runtime, the playbook returns to a target you define — the start of a specific activity, the start of a stage, or the start of the playbook — and continues from there.

Use a Go back activity when a process needs to loop back based on an outcome. For example, if a request is rejected, the playbook can return to an earlier data-gathering step instead of ending or requiring a full restart.

How it works

The Go back activity is placed inside a decision branch. When the branch condition is met at runtime, the playbook returns to the configured target and resumes execution from that point.

You can configure the Go back activity to return to one of three targets:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Activity: Returns to the start of a specific activity earlier in the playbook.
- Stage: Returns to the start of a specific stage.
- Start of playbook: Returns to the beginning of the playbook.

Design considerations

Workflow Studio enforces the following rules when you add a Go back activity. The playbook can't be activated if any rule is violated.

Rule	Description
At least one forward path required	Every decision that contains a Go back activity must have at least one branch that continues forward in the playbook.
No parallel forward branches without a decision	You can't add a Go back activity if there is a parallel branch running forward that is not separated by a decision.
Single branch evaluation required	If a decision is set to evaluate all branches that are true, it can't contain a Go back activity. Change the evaluation mode to process only the first true branch.
Target required	The Go back activity must have a configured target. The target must appear before the Go back activity and the target can’t be another Go back activity.
Must be the last activity	A decision branch can contain only one Go back activity and the activity must be the last activity.

Add a Go back activity to a playbook

Add a Go back activity to a decision branch in your playbook and configure where the playbook returns to when the activity runs.

Before you begin

Role required: pd_author

About this task

A Go back activity must be placed inside a decision branch. The decision must have at least one branch that moves forward in the playbook. For information about the Go back activity and design considerations, see Go back activity.

Note: If restart is not configured for the target, the playbook does not continue from that point. For information about configuring restart, see Configure restart for Playbooks.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. On the **Playbooks** tab, open the playbook you want to edit.
3. Insert a Go back activity on an existing decision branch or between two stages in the Diagram view.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. Select the (+) icon.

b. From the mini-picker, select **Add a Go back**.
If you insert the Go back activity between two stages or activities without a decision node, Workflow Studio automatically inserts a decision node and places the next stage or activity and the Go back in parallel branches.

4. Select the **Go back** activity.

5. On the Go back properties panel, under the **Configuration** tab, configure the Go back target.

Go back to	Description
Activity	The playbook returns to the start of a specific activity. Select the target activity from the list of activities earlier in the playbook.
Stage	The playbook returns to the start of a specific stage. Select the target stage from the list.
Start of Playbook	The playbook returns to the beginning. No ad ditional selection is required.

6. Verify that your configuration is valid.
Workflow Studio highlights errors in real-time. Correct any errors before activating.

7. Complete the playbook by adding the stages and activities required for the process.

What to do next
After the playbook is complete, test and activate it.

Parallel branches

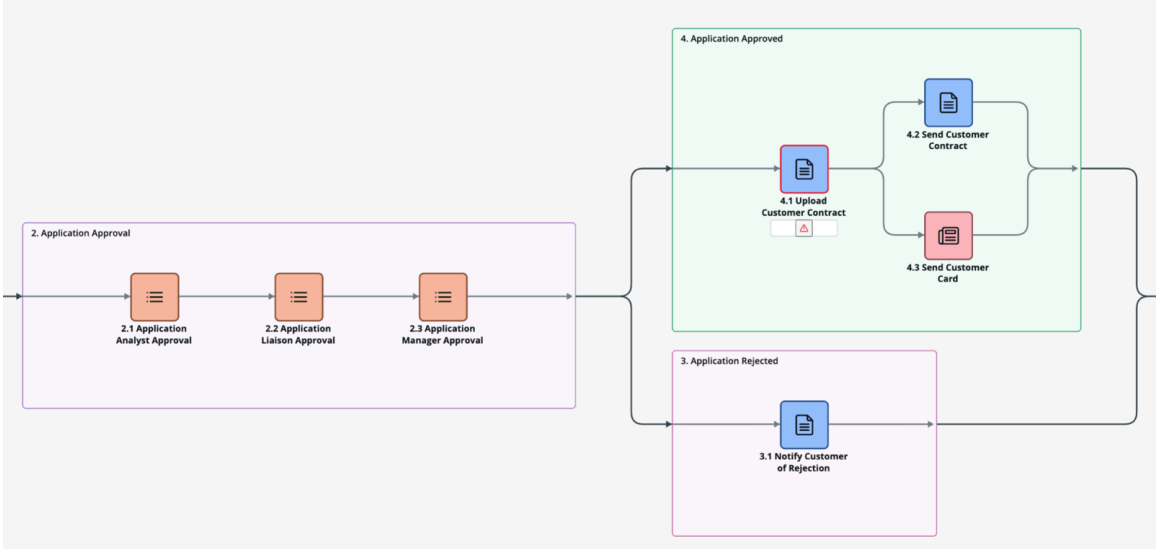
Add branches for activities and stages that run in parallel to another branch of activities and stages.

Before you begin
Role required: playbook.admin or pd_author

About this task
Parallel activities create branches like decision activities. Unlike decision activities, the activities and stages on a parallel can run on the same conditions as other branches. For example, in this credit card approval playbook:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Parallel activities and stages



In this example, agents verify information or identity at the same time as when they check credit scores. All activities and all stages will run.

Procedure

1. In Diagram view, hover on the object that you want to insert a parallel activity next to, and select the **+** icon to add an activity.
   The mini-picker displays.
2. Select the parallel icon to add a parallel branch.
   A parallel branch is added.

What to do next

Add and configure the stage or activity that will run at the same time as the other branches of stages or activities.

Add dynamic inputs to an activity

Configure your activity to show a certain set of fields based on the value of another input, such as a selected catalog item, selected decision table, or even a REST API response.

Before you begin

Role required: playbook.admin, pd_author, action_designer, flow_designer, admin

Familiarize yourself with the other Workflow Studio components. Dynamic inputs are created with actions and subflows:

1. In the ServiceNow AI Platform, you will create a new data definition for the dynamic input fields you want to add to an activity.
2. In Workflow Studio, you will create a data gathering action.
3. Still in Workflow Studio, you will create a subflow or another action with a dynamic input to consume the first action. This subflow or new action creates a JSON schema that represents the field(s) you want to add to an activity.
4. In the ServiceNow AI Platform, you will create an activity definition using the subflow or action with the dynamic input.

Once your activity definition is created, Playbooks authors can add and configure activities with the dynamic inputs.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

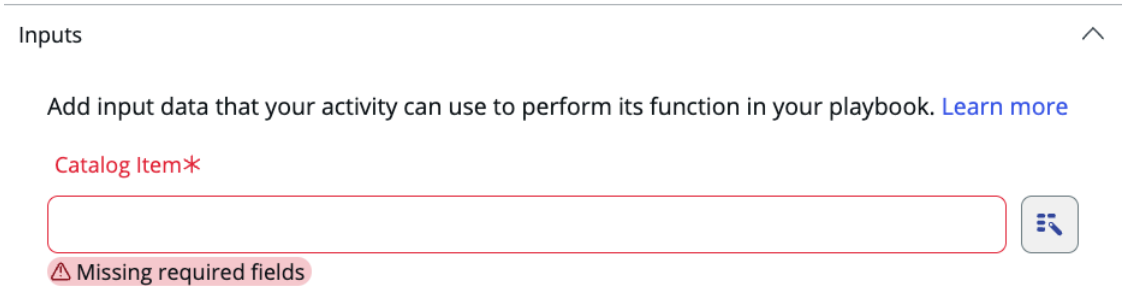
About this task

A dynamic input is an input that changes based on another input. In Workflow Studio Playbooks, you can present multiple dynamic inputs based on another input.

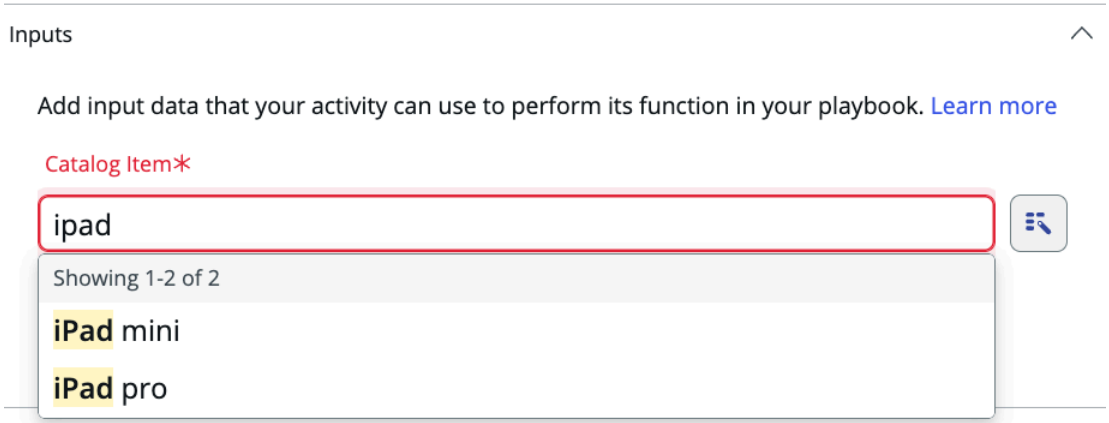
Example

When a user requests catalog items, you can dynamically present a list of catalog variables based on the selected catalog item.

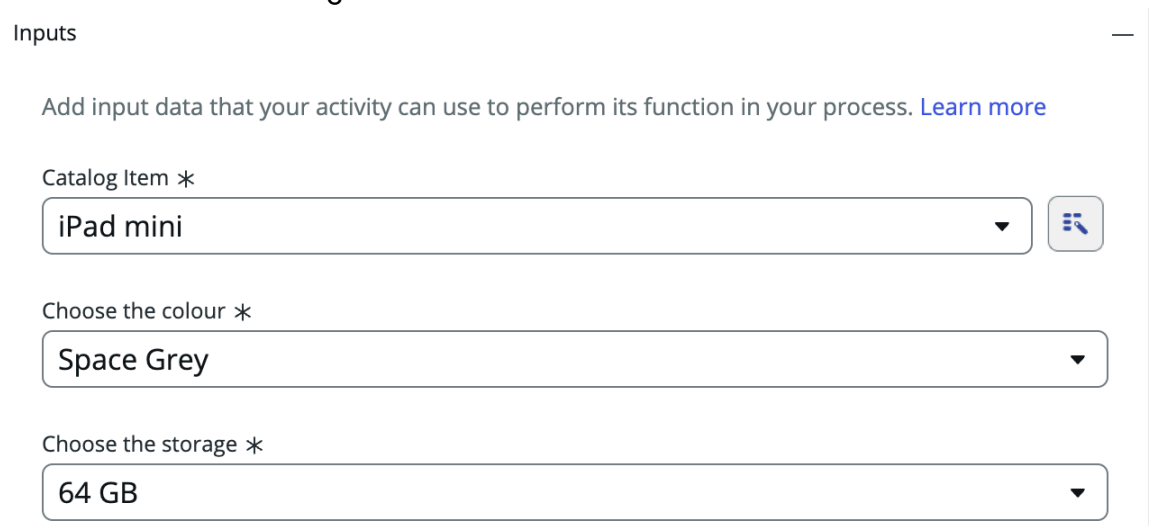
1. The first input required is for the Catalog Item field.



2. A user selects **iPad mini** in the Catalog item field.



3. Two (2) additional fields for color and storage options appear in response to the user selecting an iPad mini as the Catalog Item.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Procedure

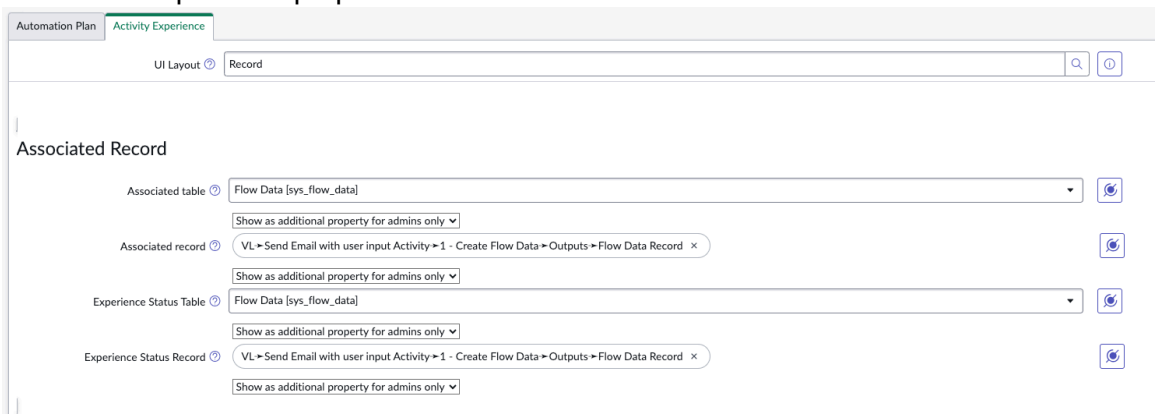
1. Navigate to **All** > **Workflow Studio** and select **Actions**.
2. Create an action to add an input.
   The input appears under the **Script step** > **Input Variables** section. The JSON under the **Script** section should include the new input.
3. In the **Outputs** section, click **Edit Outputs** to make sure that the value of the **Name** field is **output**, and that **JSON** is the selected in the **Type** drop-down field.
4. Create a subflow with the new input.
5. Navigate to **All** > **Process Automation Administration** > **Activity Definitions**.
6. Open or create the activity definition to add the new input to.
7. Under the **Automation Plan** tab, make sure the action or flow you created with the new input is the underlying **Flow or Action**, and that the new input appears in the **Variables** section.
8. Change the visibility of the new input from **Show as additional property** to **Always show**.
9. Save your changes.
   Once your activity definition is created, Playbooks authors can add and configure activities with the dynamic inputs.

Playbook activity state mapping

Use playbook activity state mapping to override the status of a playbook card.

A playbook card's state comes from the Activity State by default. Activity states come from the Sub Flow or Flow Action powering the activity.

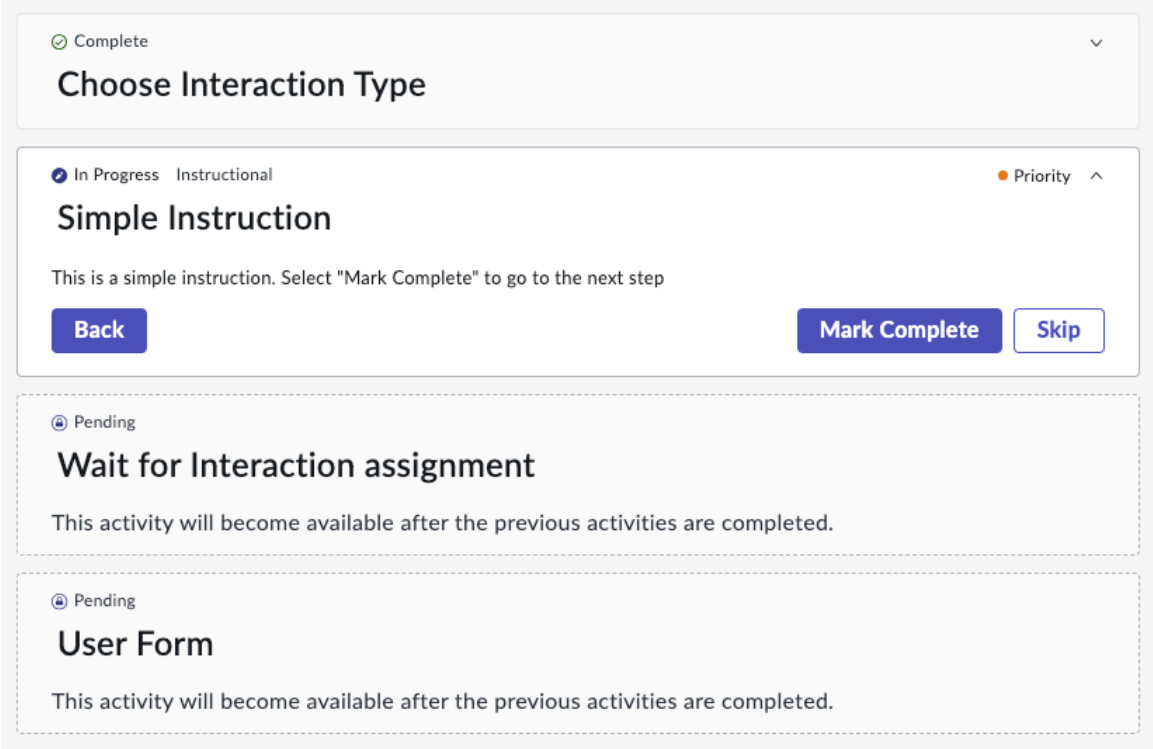
Activity Definition authors can specify a records to provide the status shown in playbook cards. This record is referred to as an **Experience Status Record**. It is specified within an Activity Definition's experience properties.



Any record from any table can be used as an Experience Status Record. Default activity definitions use **sys_flow_data** records as their Experience Status Record.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Activity States displayed in card view



Default Activity States

Out-of-the-box Default Activity States in sys_flow_data record

Status	Flow State
Pending	Flow has not started
Ready	Flow is
In Progress	Flow is running
Complete	Flow has finished
Skipped	Flow was skipped due to conditions
Error	Flow encountered an error
Canceled	Flow was canceled

Activity states are used in the following:

- Declarative Action conditions
- Activity Override conditions
- Animations
- Card visual experience

Exceptions

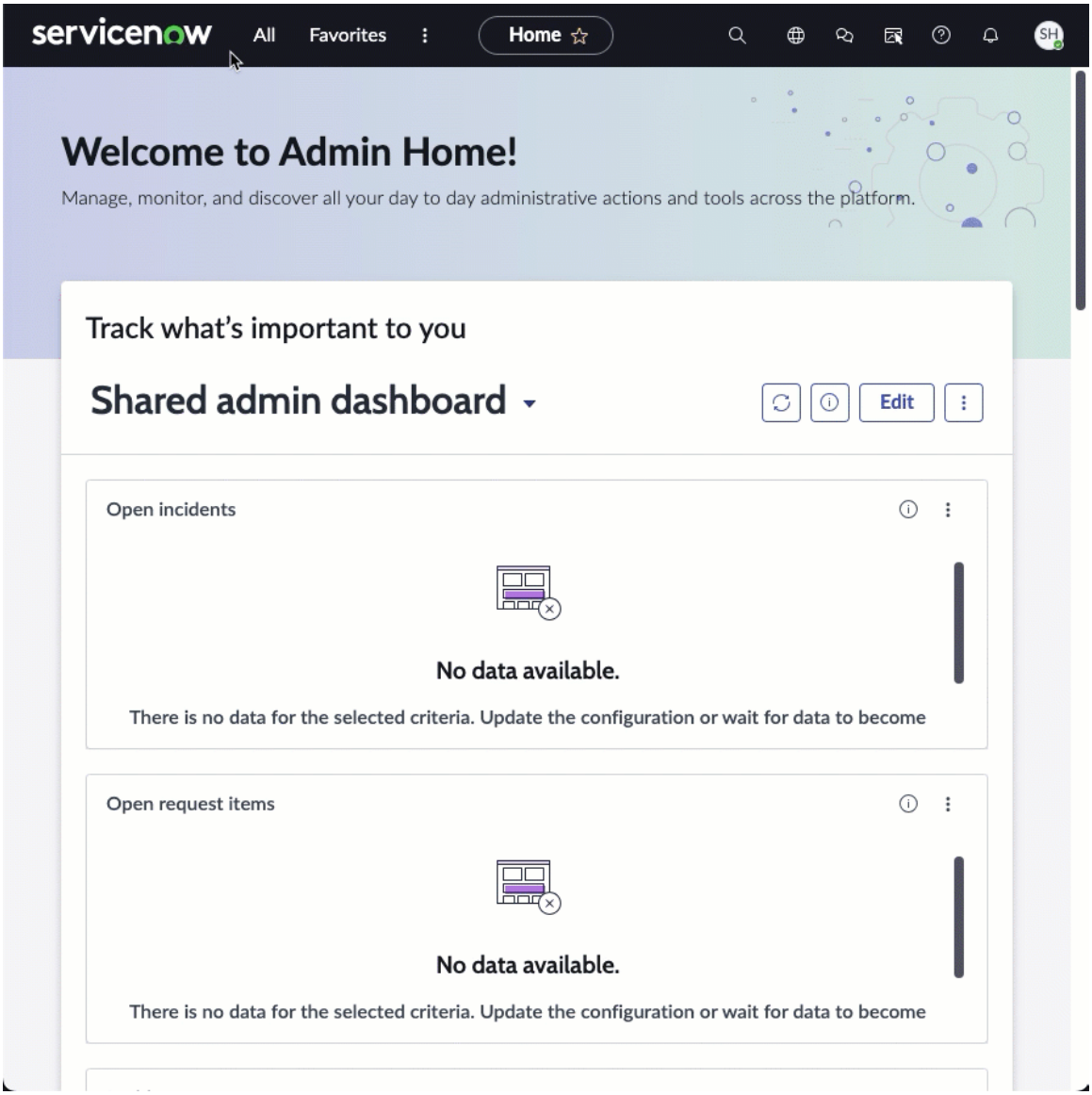
Business logic doesn't always align one-to-one with the flow. The following are examples of exceptions:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- An agent clicks **Skip** on an instructional card. The flow displays as complete, but the business logic is skipped.
- A flow may never complete if a task is waiting for input from an agent to restart a loop. The associated task is effectively complete in this state.

Playbook activity state-mapping rules

Map playbook activity states to states from the given experience record.



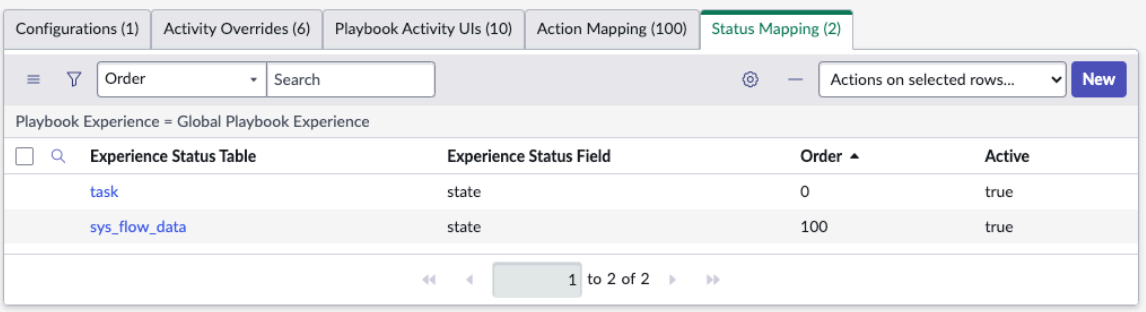
Activity state-mapping rules are required for each Experience Status Table. These rules determine how to update the status for an experience record whenever a playbook user updates the state of an activity, such as when they complete an activity.

The out-of-the-box Global Playbook Experience includes default rules for the **sys_flow_data** and **task** tables. These sets of rules are enough for most playbook activities, but additional rules can be created for custom tables if needed.

Find the default mapping rules under the **Status Mapping** tab of a playbook experience.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Status Mapping tab



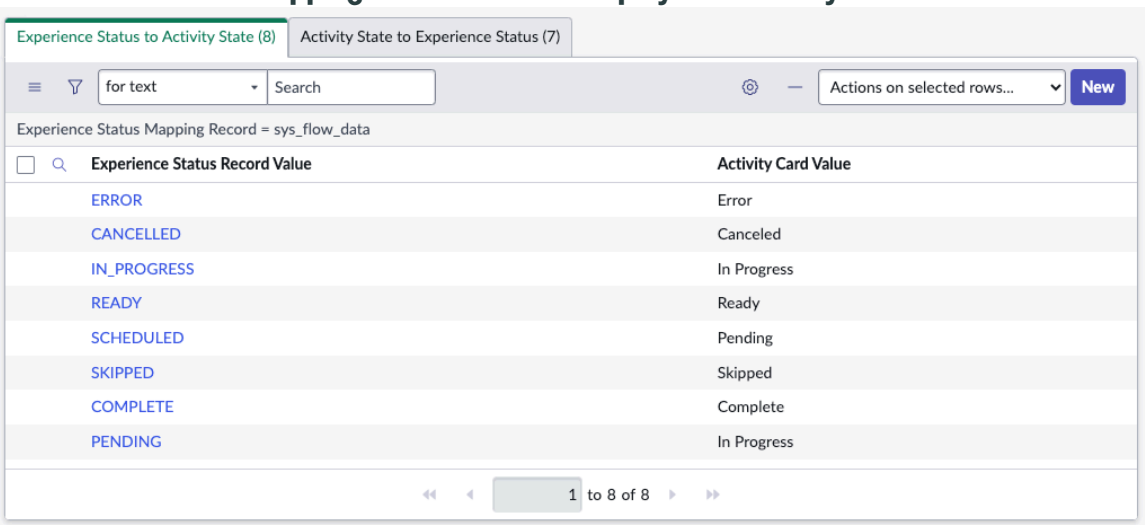
Experience status mapping records

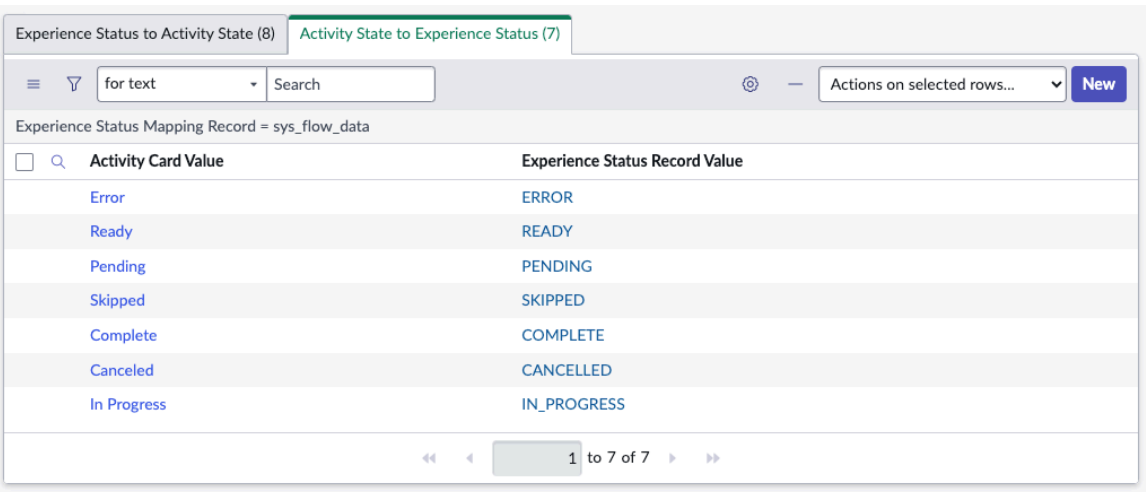
A Experience Status Mapping record pulls the states (**Experience Status value**) for the given **Experience Status Table**. Map from:

- **Experience Status to Activity State**, or
- **Activity State to Experience Status**.

The **Experience Status to Activity State** tab controls which activity state is shown in a card for a given experience status record value. The **Activity State to Experience Status** tab controls how the experience status record is updated when a playbook user updates an activity state, such as skipping an activity.

Bidirectional status mapping between flows and playbook activity states

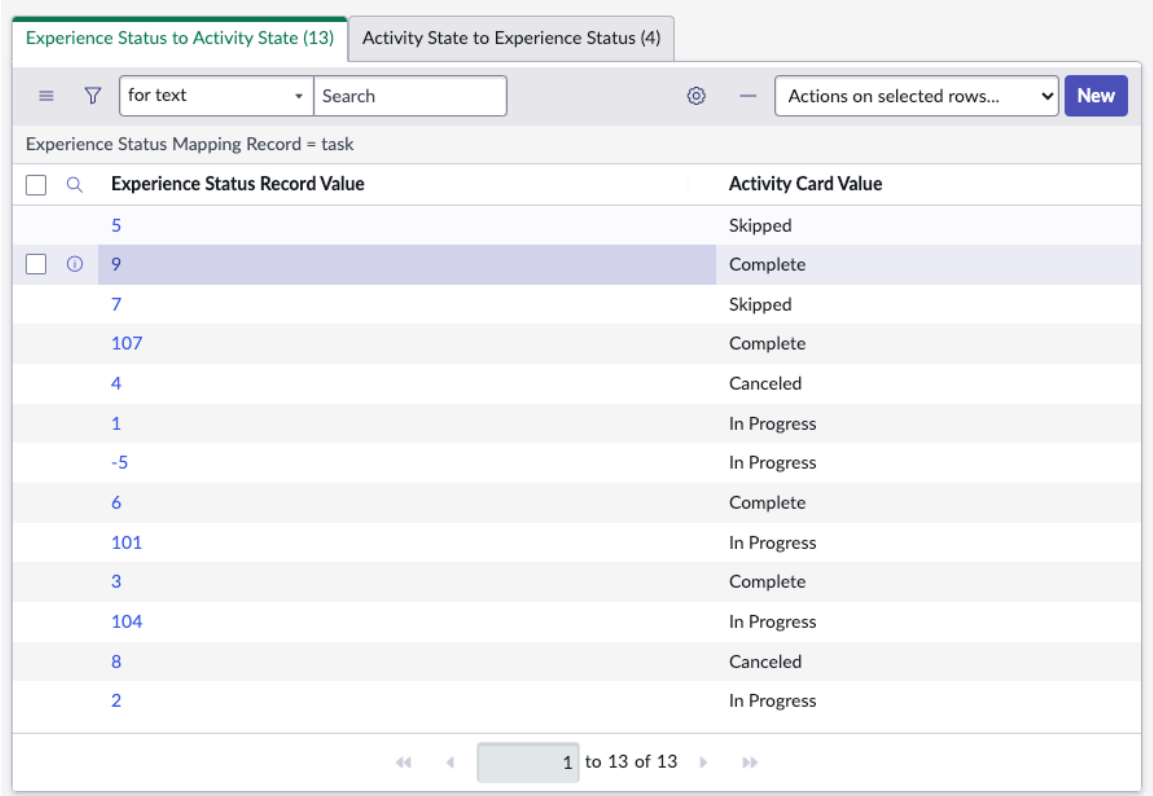


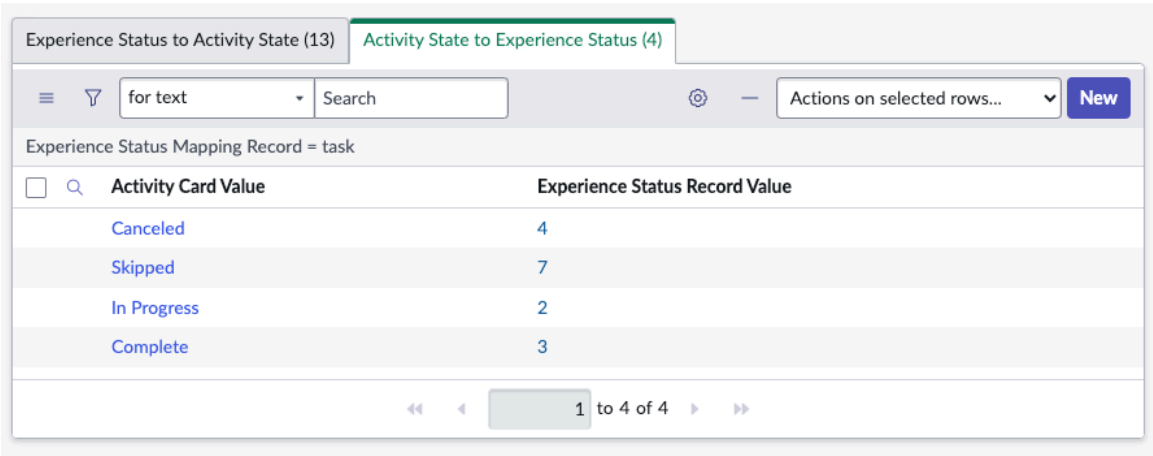


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: There is always a default set of activity states, but the set of states for an experience record depends on the table in your activity definition.

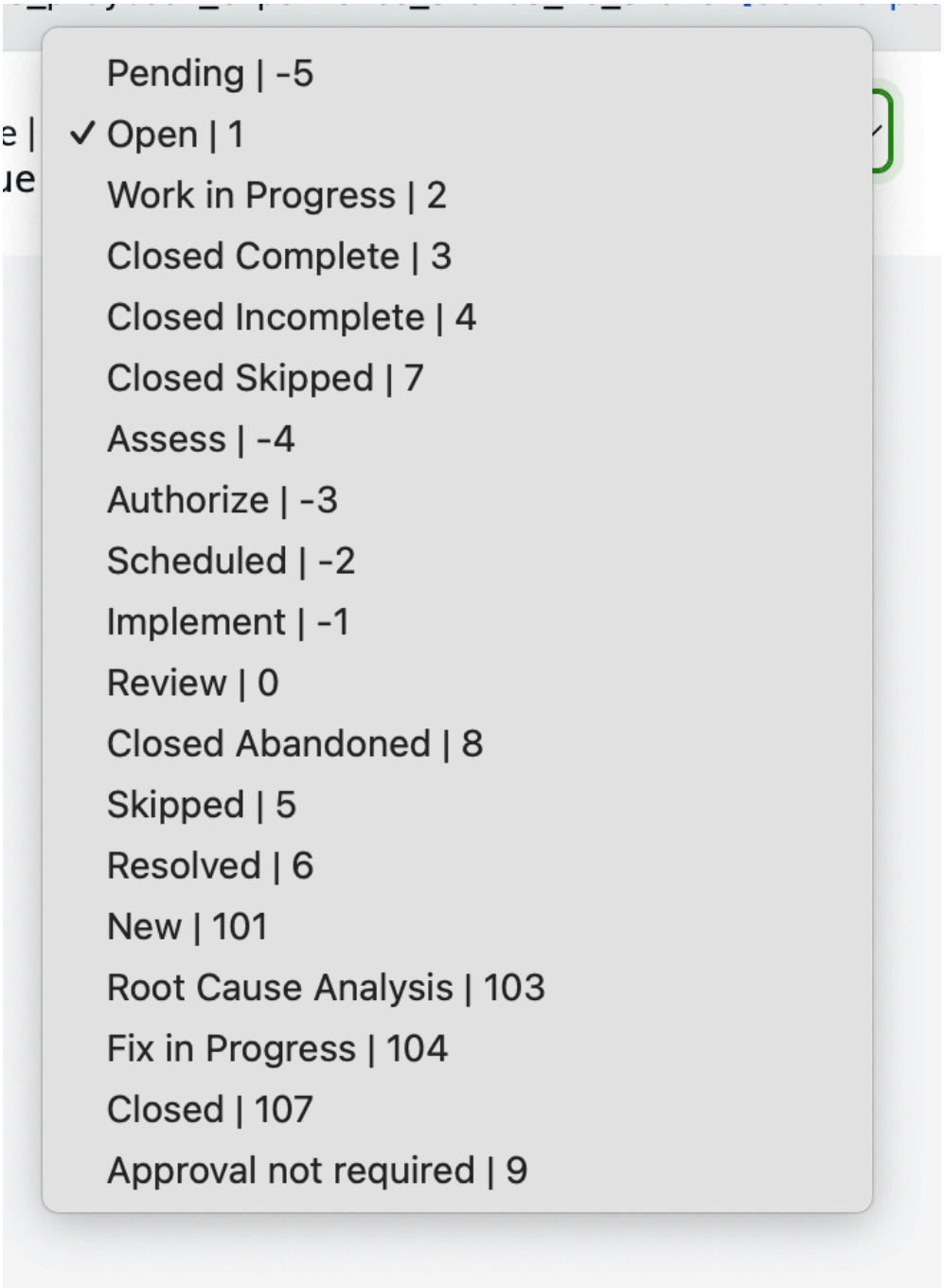
Task Status to Activity State Map and vice versa



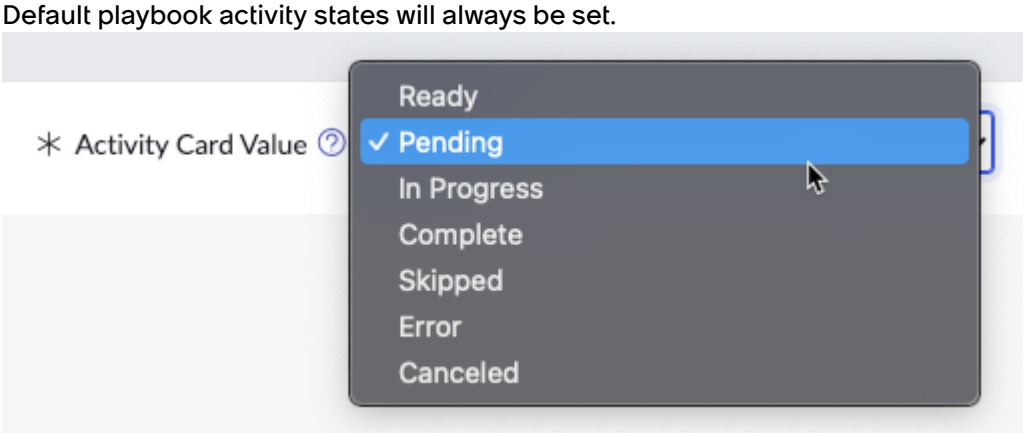


© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: The number values shown indicate these task statuses:



Default playbook activity states will always be set.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook activity state-mapping permissions

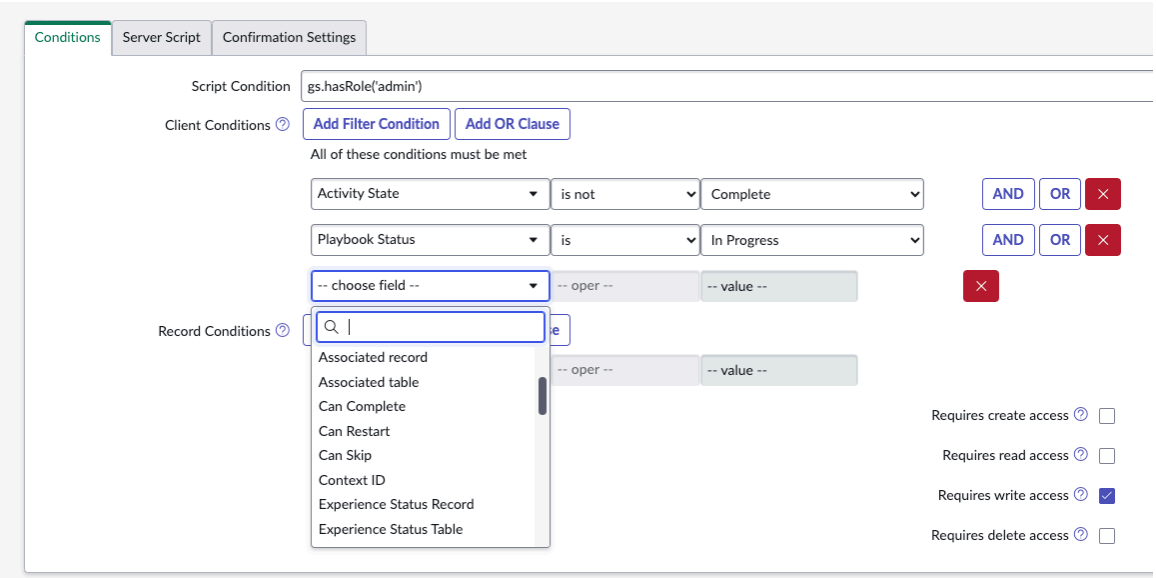
User permissions must be assigned to allow agents to complete or skip activities in playbook using activity state mapping.

Can Complete and **Can Skip** permissions in declarative action client conditions **[sys_declarative_action_assignment.list]** are determined whenever an activity is fetched based on the following conditions:

- **Experience Status Record** must be defined
- Users must have write access on **Experience Status Record**
- Activity State Mapping rule set must exist for **Experience Status Table**
- User must have write access on **Experience Status Field** for that table
- **Activity State to Experience Status** mapping rule must exist for that corresponding operation:

Playbook Activities	Activity State
Can Complete	Complete
Skip	Skipped

If the permissions are not valid, users cannot perform that operation. The corresponding declarative actions that use the **Can Complete** and **Can Skip** client conditions will not display.



Note: If a user does not have read access on the **Experience Status Field** of the **Experience Status Record**, the default activity state will be used instead. The default activity state is the state of the flow powering the activity.

Playbook variants

Use one playbook for multiple scenarios.

Create different variations on top of a base playbook for multiple use cases instead of duplicating and modifying playbooks, or relying on one-time workarounds that use complex run conditions and branching.

Consider using playbook variants if you have similar business processes that change based on specific factors. For example:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Processes and requirements for different locations (regions, countries, municipalities, organizations, etc.).
  - Banking SLAs differ by region, USA is 30 days and EMEA is 45 days with potential for further variation by country.
  - Card disputes with variance by network: Visa, Mastercard, Discover, etc.
- Managing hiring flows that vary by industry, department, and job titles.
- Business processes and requirements for different users and roles.
- Business processes and requirements for different kinds of applications, such as licenses and permits for different kinds of businesses, etc.

To get started, see Create a playbook variant.

General Guidelines

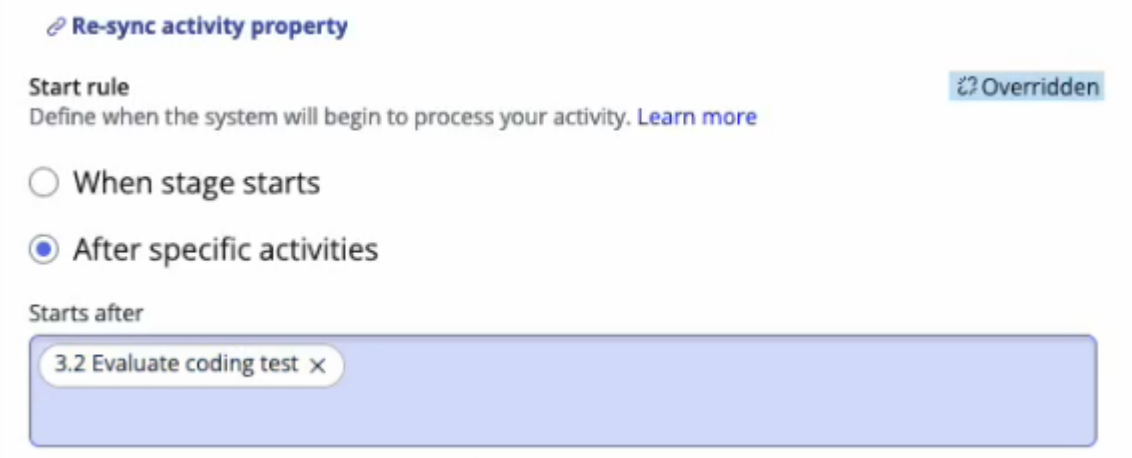
Create, run, troubleshoot, and monitor your playbook variants more effectively. Use these guidelines to optimize the performance of your playbook variants.

Evaluate your variants

By default, the variants are evaluated at the start of the playbook, from the top down at every level. The first variant that meets the trigger conditions will run. However, you can choose to evaluate the variants after certain activities are complete. You can leverage the output generated in the completed activities to decide which variant to run. This gives you more flexibility in designing the playbook and its variants.

Pay attention to property overrides

As you make changes to your variants, related activity configurations that are inherited from parent variants (such as start rules or display order) may be overridden. The overridden link and label appear next properties that are no longer synced with the parent variant or playbook.



Check all properties to ensure they are still configured as you want them. Re-sync properties to be the same as in the parent, if needed.

Don't create variants if you want to change stage properties

Stage overrides are not currently supported in playbook variants.

Create a playbook variant

Create variations of a playbook for different use cases.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin
Role required: admin or playbook.admin

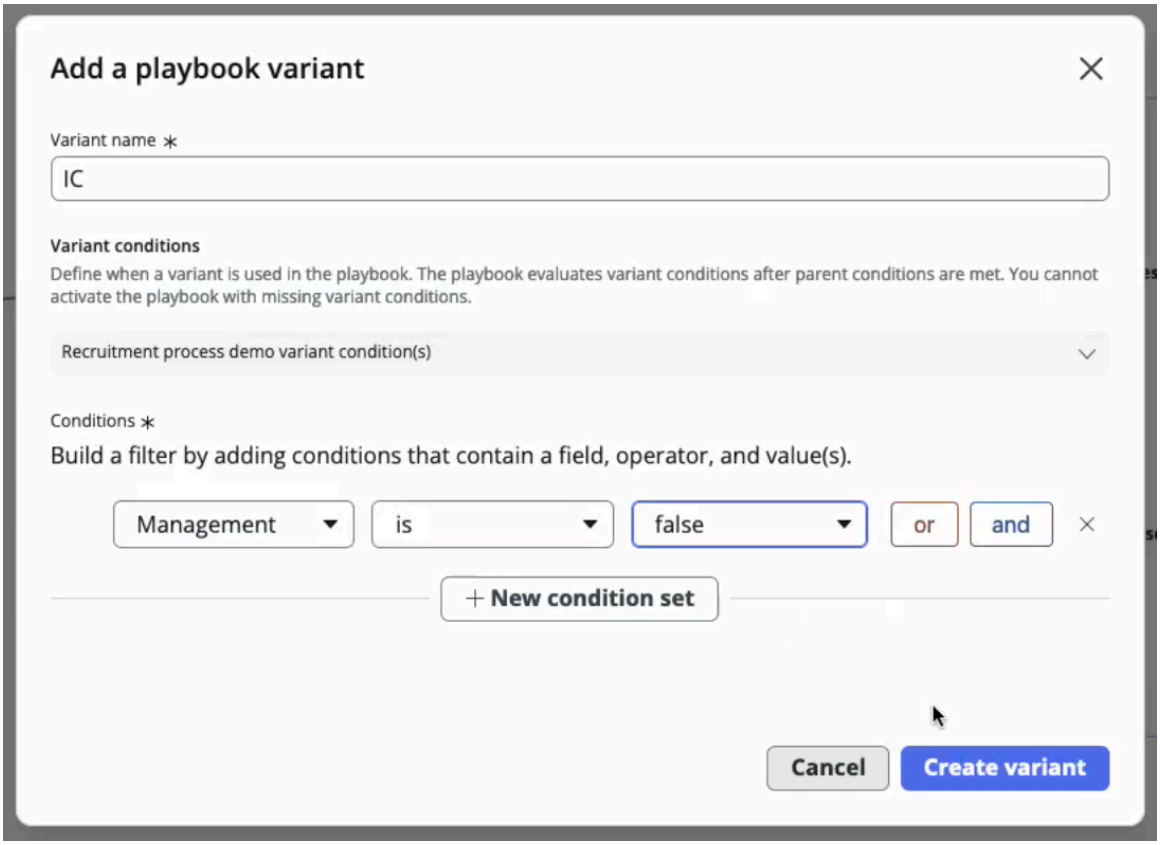
Procedure
1. Navigate to **All** > **Workflow Studio**.
2. Open the playbook that you want to create variant for.
3. Select the variant icon ( ) to open the variant panel on the left.
4. Select **Add a variant**.
5. Fill in the following fields.

Option	Description
Variant name	Enter a unique, user-facing name for your play book variant. This name appears to agents and fulfillers when this variant runs.
Conditions	In the condition builder, select or enter a field, operator, and value. **Note:** To learn more about condition builders, see Add more conditions for this variant to run, as needed.

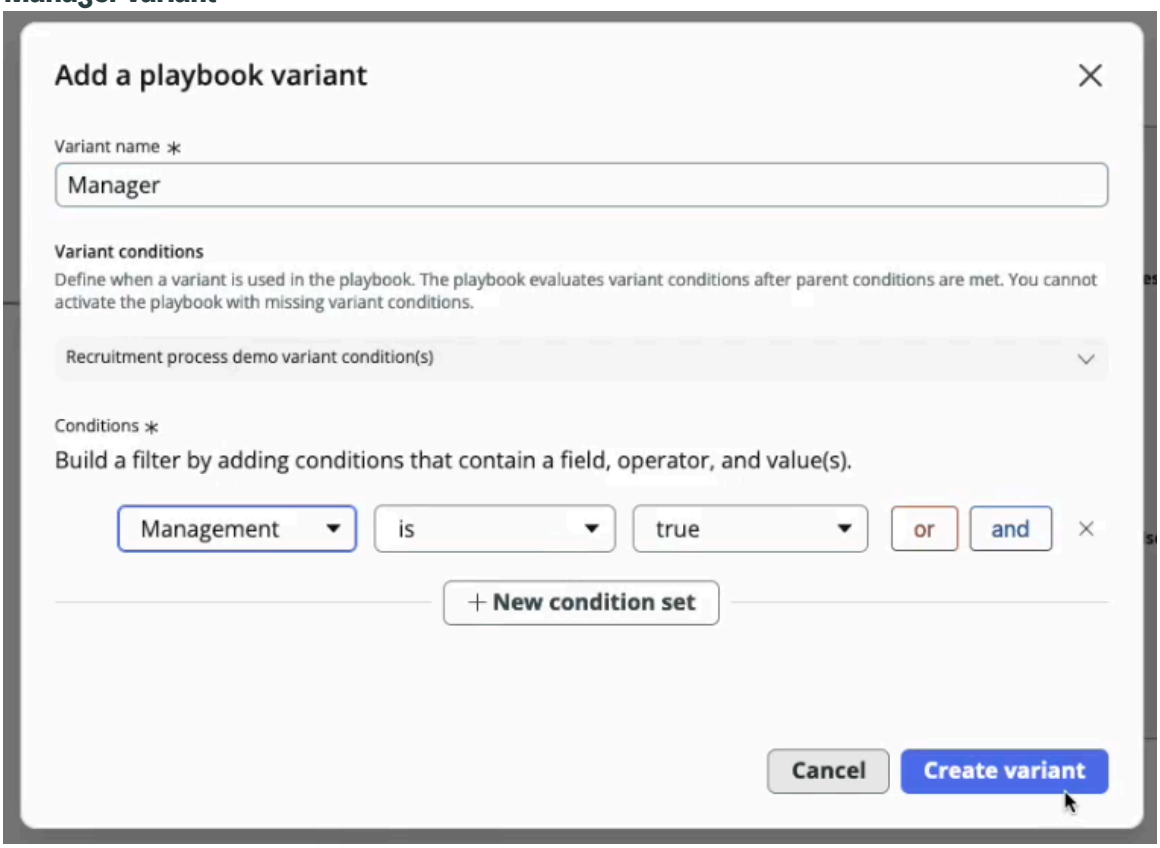
Example
In this example, we want to create different versions of a base recruitment process playbook for individual contributors (IC) and managers. In the condition builder, we indicate whether the variant is for management roles or not.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

IC variant



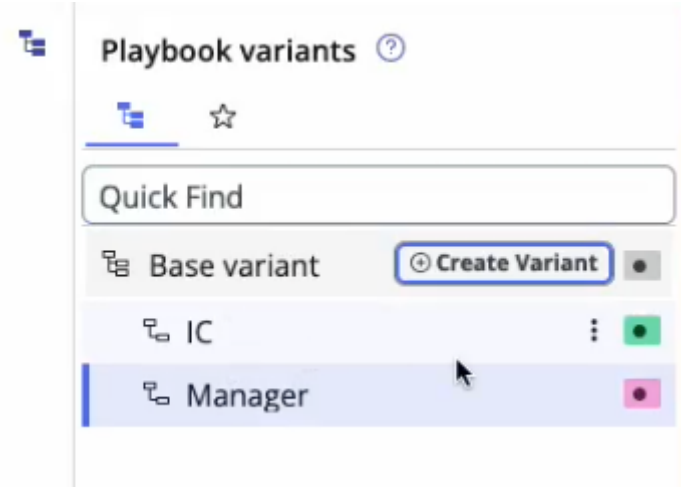
Manager variant



6. Select **Create variant**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You have two new variants of the base recruitment playbook, one for ICs and one for managers.



The color of the canvas border corresponds to the color of the variant that is open.

Important: The order of your variants is important. Variants are evaluated in the order that they are listed in the panel, from top to bottom. To learn more about reordering your variants, see Re-order playbook variants.

7. As you make changes to your variants, make sure all activity properties are still configured as needed.
   Override properties for an activity if they should be different from the parent playbook.

   Override activity property

   Activities that are the same as in a parent playbook are grayed out. If you change or add an activity, it is shown in full color.

   Note: For more general guidelines, see General Guidelines.

8. **Optional:** Add a child variant to a variant.

   a. **Note:** You can nest child variants up to 6 levels.

      Hover over the variant in the variant panel, and select the kebab menu to open the action menu.

   b. Select **Add child variant**.

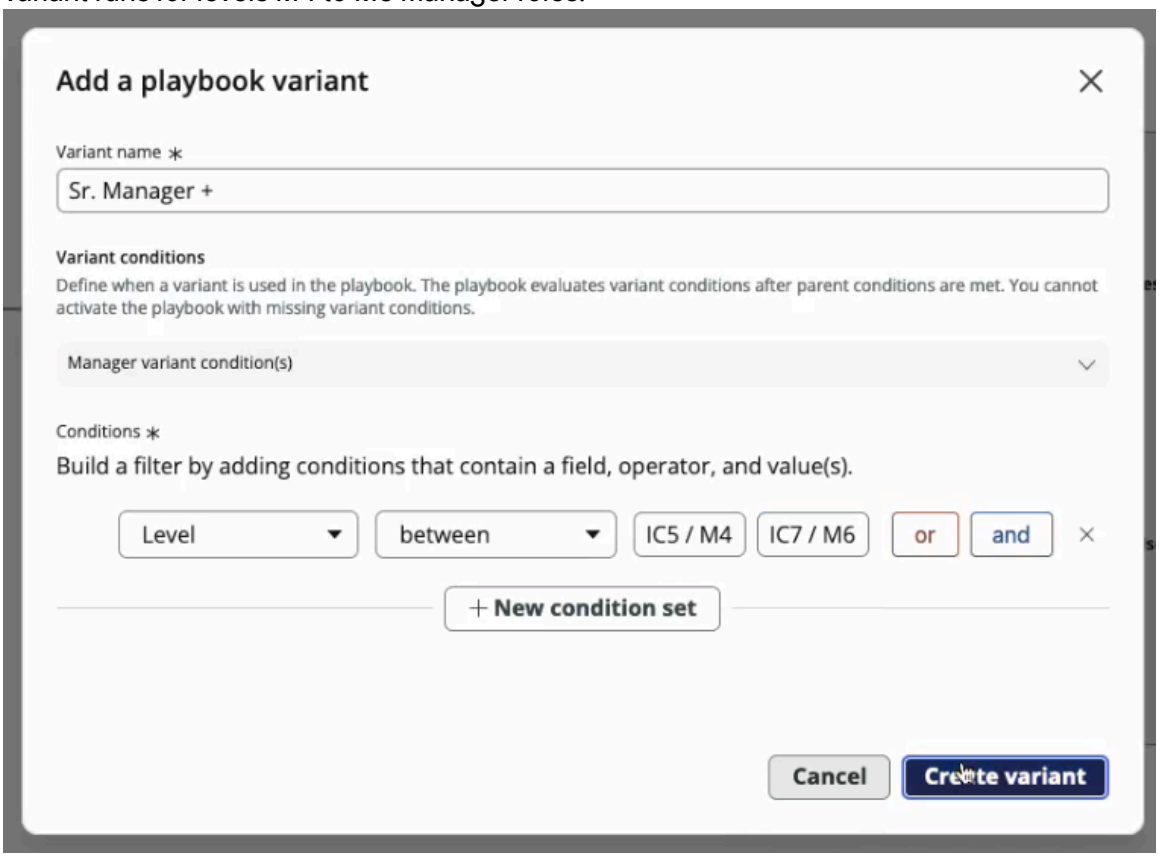
   c. Fill in the following fields.

Field	Description
Variant name	Enter a unique, user-facing name for your playbook variant. This name appears to agents and fulfillers when this variant runs.
Conditions	(Optional) In the condition builder, select or enter a field, operator, and value. To

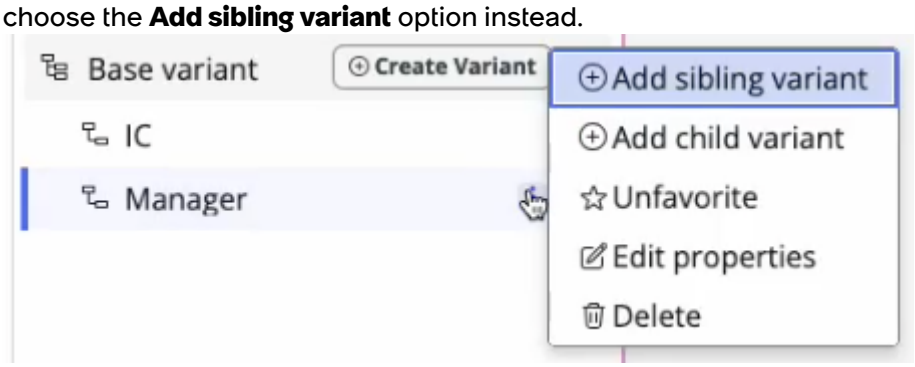
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	learn more about condition builders, see Condition builder. Add more conditions for this variant to run, as needed. **Note:** Child variants automatically inherit the conditions of the parent variant.

Example
In this example, we want to create a child variant of the Manager variant for recruiting senior managers and above. We add an extra condition to specify that this particular Manager child variant runs for levels M4 to M6 manager roles.



9. **Optional:**
   Follow step 8 to add a variant at the same level as another variant (a sibling variant), but choose the **Add sibling variant** option instead.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

10. **Optional:** Edit a playbook variant's conditions.
    a. Hover over the variant in the variant panel, and select the kebab menu to open the action menu.
    b. Select **Edit properties**.
11. **Optional:** To save a variant as a favorite, see Save a playbook variant as a favorite.

What to do next
Set variant evaluation point

Set variant evaluation point

Set a point in your base playbook after which the variants are evaluated and run.

Before you begin
Role required: admin or playbook.admin

About this task
Instead of evaluating the variants at the start of your playbook, you can choose to evaluate variants after certain activities are complete in the base playbook. For example, in a recruitment playbook, you can run different variants such as Manager, Senior Manager, or Individual Contributor, based on the candidate profile or interview feedback during one of the stages. This gives you more flexibility in designing and building your playbook.

If you do not specify any evaluation point, the variants are evaluated at the start of the playbook based on the trigger conditions.

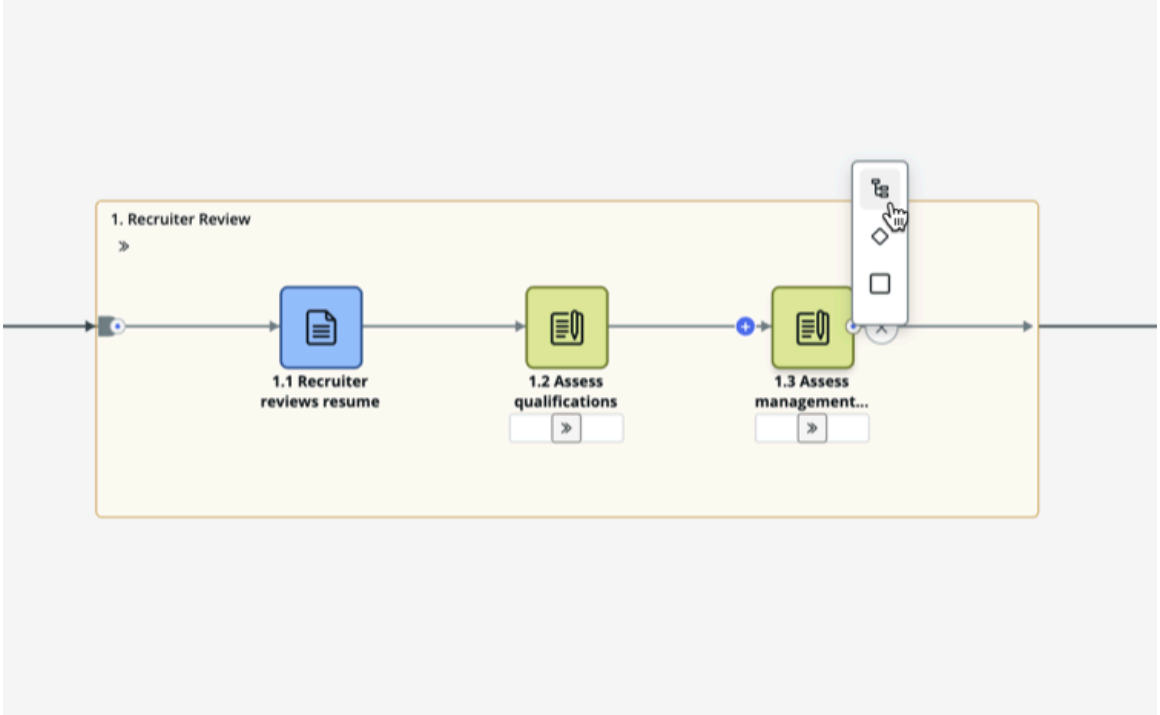
To insert an evaluation point, make sure that:

- The playbook does not have any variant activity before the evaluation point.
- Any prior activity does not overwrite the value of the evaluation point.
- The variant condition does not refer to any activity after the point.

Procedure

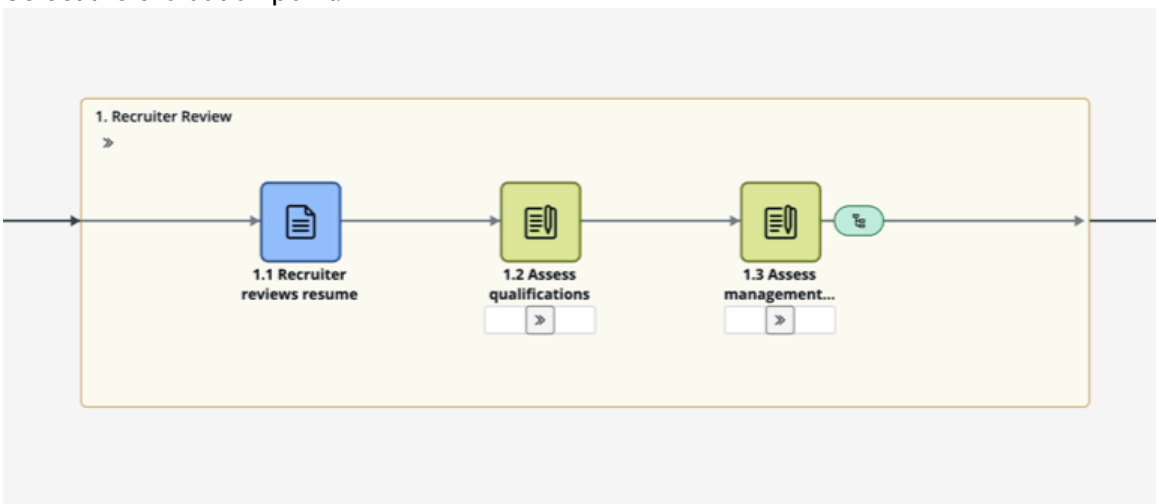
1. Navigate to **All** > **Workflow Studio**.
2. Open your playbook with variants.
3. In Diagram view, select **+** after the activity where you want to evaluate the variants.
4. From the mini-picker, select the variants icon ( ) to add variant evaluation point.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. To move the evaluation point to a different location:

   a. Select the evaluation point.



   b. On the *Move the global variants evaluation point* dialog box, select one of the following.

Option	Description
Evaluate all variants at the beginning of the playbook	Moves the evaluation point to the beginning of the playbook.
Evaluate children after field	Displays a list of valid locations in the play book and moves the evaluation point to the selected location.

What to do next

Test the playbook to make sure that it's working as expected. See, Test a playbook

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Re-order playbook variants

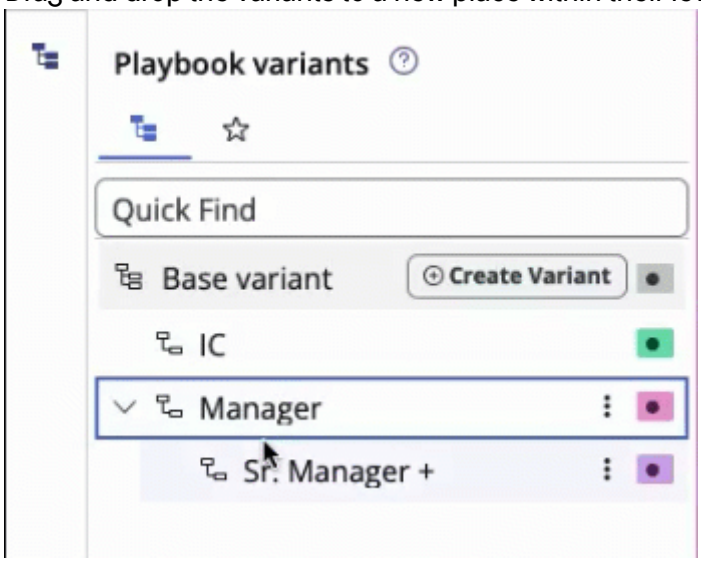
Change the order in which playbook variants are evaluated.

Before you begin
Role required: admin or playbook.admin

About this task
Playbook variants are evaluated from the top down at every level. The first variant that meets conditions will run.

Procedure

1. Navigate to **All** > **Workflow Studio**.
2. Open the playbook with the variants that you want to re-order.
3. Select the variant icon ( ) to open the variant panel on the left.
4. Drag and drop the variants to a new place within their level.



Variants cannot be moved to different levels. They can only be reordered at the sibling level.

Save a playbook variant as a favorite

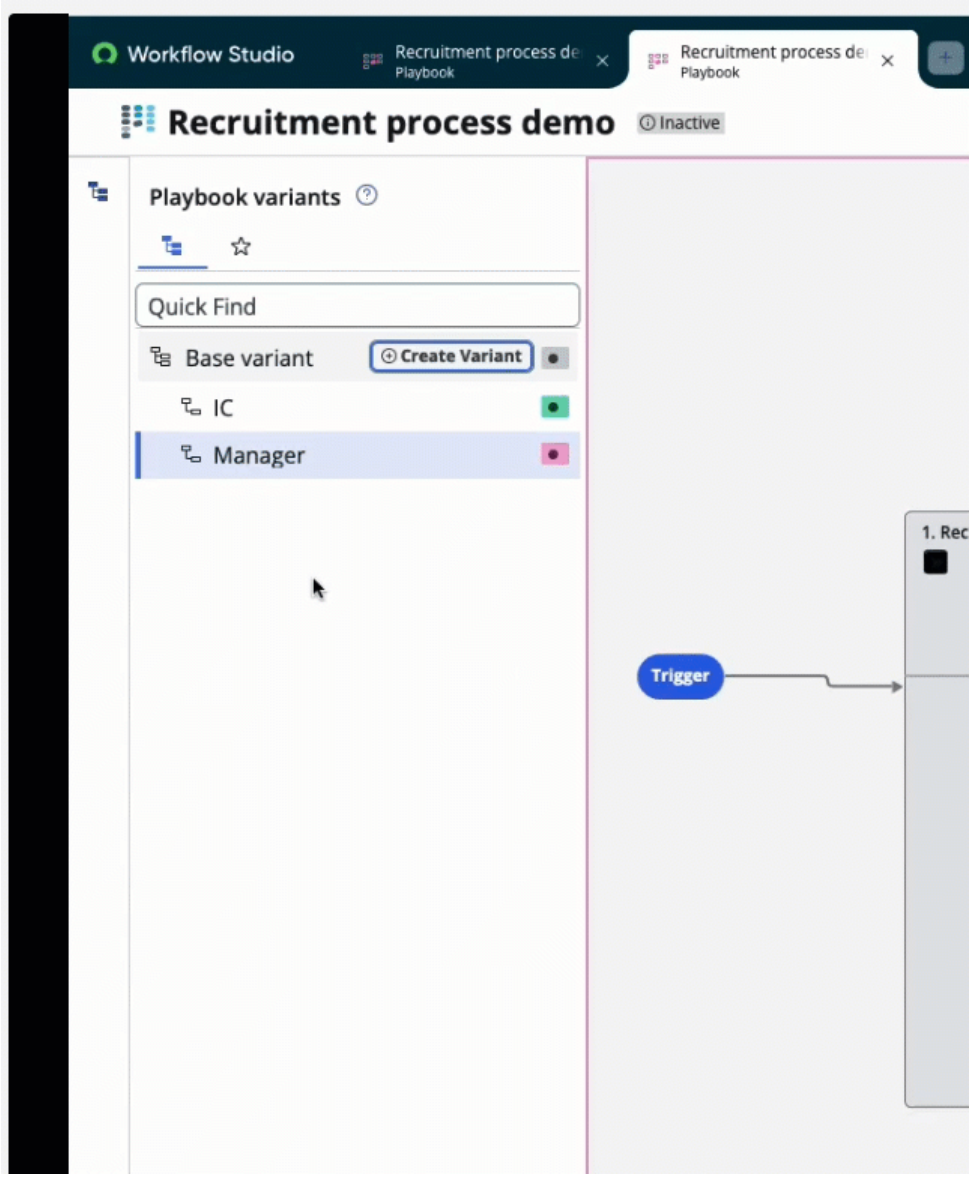
Save a playbook variant as a favorite for quick reference.

Before you begin
Role required: admin or playbook.admin

Procedure

1. Navigate to **All** > **Workflow Studio**.
2. Open the playbook with the variant that you want to save as a favorite.
3. Select the variant icon ( ) to open the variant panel on the left.
4. Hover over the variant in the variant panel, and select the kebab menu to open the action menu.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. Set the variant as a **Favorite**.

> **Tip:** You can also just search for variants in the **Quick Find** search bar.

Creating and managing Playbooks

Learn how to create and configure a playbook in Workflow Studio.

You can view your list of Playbooks by navigating **Process Automation** > **Workflow Studio** > **Playbooks**. Opening a playbook allows you to edit it. If there are no playbooks in the list, you can create a new one by clicking **New** and selecting **Playbook**. For more information on creating a playbook, see create a process definition.

Playbook properties

After you create a playbook, access its properties by opening it, and selecting **Properties** in the **More actions** menu in the upper right corner of the header. In the **Additional properties** modal, you can edit the following information:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Label	Name of the playbook to display in Workflow Studio and in a Playbook Experience.
Description	Description of what your playbook does.
Conditions	Conditions that must be met to run your playbook.
Run my trigger	Option that defines how many times your trigger can run for your playbook. Choices include: • **Once**: Triggers the playbook once for the life of the triggering input record. • **Only if not currently running**: Triggers the playbook for every unique change if a process execution is not currently running. • **For every update**: Triggers the playbook every time the input record is updated, regardless of whether there has already been or there currently are any running process executions.
Run on extended	Option to trigger your playbook when record operations occur on tables that extend the input table. For example, if your selected table is the Task [task] table and you select this option, your playbook triggers when a Problem [problem] record is created or updated. For more information, see Table extension and classes.

Note: After you create a playbook, you can't change the trigger's input table or trigger type.

Design considerations

Refer to these design considerations when working with playbooks:

Avoid duplicating business logic used in Workflow Studio, Workflow, and business rules

Replace separate business logic such as business rules, flows, and workflows with a consolidated playbook. Make sure that you deactivate any external business logic you replace to avoid duplication of effort.

Ignore records added or updated by import and update sets

Record triggers ignore records added or updated by applying an update set or importing an XML file. These operations apply to the entire application or table rather than an individual record.

Related topics

Designing Playbook Experience

Running Playbook Experience

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Create a playbook

Create a playbook to set up an automated business process. Use Playbook builder in Workflow Studio to add stages, activities, triggers, and runtime permissions, then activate the playbook to make it available to agents and fulfillers.

Before you begin

- Activate the Playbook application for your instance. See Activate Playbooks.
- Familiarize yourself with the tables and relationships that your application uses for the playbook that you want to create.
- Familiarize yourself with any features that your business uses to automate operations on the ServiceNow AI Platform, such as flows, subflows, and actions.
- Role required: admin, playbook.admin, or playbook.write.

About this task

Use this procedure to build a new playbook from scratch. You can create a playbook with no trigger, a single trigger, or multiple triggers. If you change a playbook after activating it, the system saves your changes but deactivates the playbook. You must activate the playbook again to publish any new changes.

Fluent support for playbooks lets developers build, edit, and manage playbooks as code with the Fluent domain-specific language (DSL) in the ServiceNow IDE or a local SDK. For more information, see https://servicenow.github.io/sdk/guides/playbook-guide.

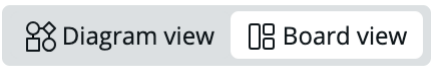
Procedure

1. Navigate to **All** > **Workflow Studio** > **Playbooks**.
   The Workflow Studio landing page opens with the Playbooks list displayed by default.
2. In the upper-right corner, under **New**, select **Playbook**.
3. Fill in the following fields.

Playbook fields

Field	Description
Playbook name	Unique, user-facing name for the playbook. Appears to agents and fulfillers at runtime.
Application	Application scope for the playbook. Select **Global** to run the playbook in any application scope.
Description	Descriptive details about the playbook.

4. Select **Build playbook**.
   The builder displays in **Diagram view** by default, but you can select **Board view** to switch between views anytime as you build your playbook.



5. Select the **Start** node.
   The Playbook properties side panel opens.
6. Under the **Details** tab, fill in the fields.
   You can also update the Playbook name and Description.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook properties: Details tab fields

Field	Description
Limit playbook executions for each parent record to	Maximum number of times the playbook can run for a single parent record.
Execution type	Type of playbook to create. ○ **Record driven:** Playbook tied to a record. Triggered on demand or automatically based on record operations. Data from the playbook is stored on that record. ○ **Standalone:** Single-session playbook that does not store data to a record. Must be manually triggered or called from another playbook.
Parent table	Table that provides trigger records and other playbook inputs. Required for Knowledge and Email activities.
Allow this playbook to be restarted during runtime	When selected, runtime users can restart the entire playbook during a run.

7. Under the **Inputs** tab, add inputs for a playbook to launch with.
   Inputs defined here are accessible throughout the playbook via dot-walking and dot notation, for example `inputs.inputName`, and can be used in activity fields, conditions, and UI elements.

   Tip: To trigger a playbook with API inputs instead of trigger records, use the `triggerPlaybook(String scopedName, GlideRecord parentRecord)` API to trigger a playbook. For more information about the API, search `triggerplaybook` on the ServiceNow Developer Site: Playbook Experience APIs.

8. Under the **Runtime permissions** tab, configure permissions for users, user groups, user criteria, and roles.
9. Configure a trigger for the playbook.

   You can create a playbook with no trigger, a single trigger, or multiple triggers. For more information, see Add and configure a trigger in a playbook.

10. Add activities, stages, decision nodes, and parallel branches as required to automate your process.
    Continue adding stages and activities until your playbook reflects the full business process. For more information, see Stages and activities.
11. Preview activities to confirm the activity's appearance to end users and adjust their configuration.
    For more information about previewing activities, see Preview an activity's runtime UI.
12. **Optional:** Add a variant to your playbook.
    You can use one playbook in multiple use cases by using variants. For more information, see Playbook variants.
13. After adding all stages and activities, test the playbook.
14. After testing the playbook, select **Activate** in the header.
    The playbook is published and runs when its trigger conditions are met.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Result

When the trigger conditions of the playbook are met, the system creates a Process Execution record and renders user-facing configurations for Playbook Experience. For an example of how to digitize a manual business process, see Create a sample playbook.

What to do next

Set up the Playbook Experience for your agents and fulfillers.

Playbook generation from text prompt or image

Generate a playbook using AI from text prompt or image inputs. For example, you can enter a text description to generate a playbook for managing customer support cases.

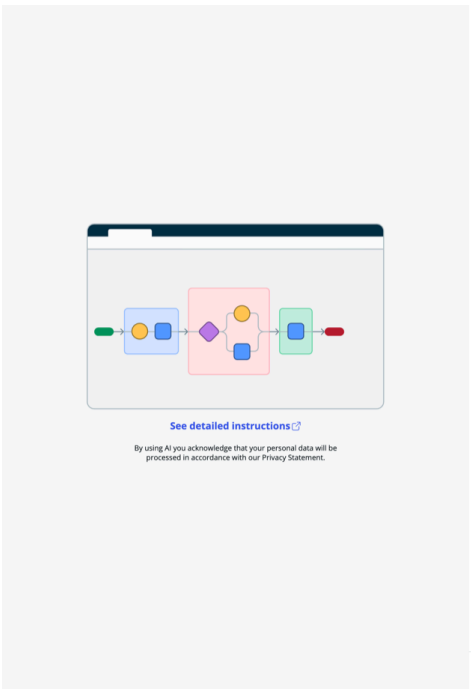
ServiceNow Otto for Creator activates the playbook generation skill. Playbook generation gives generative AI capabilities to playbook authors.

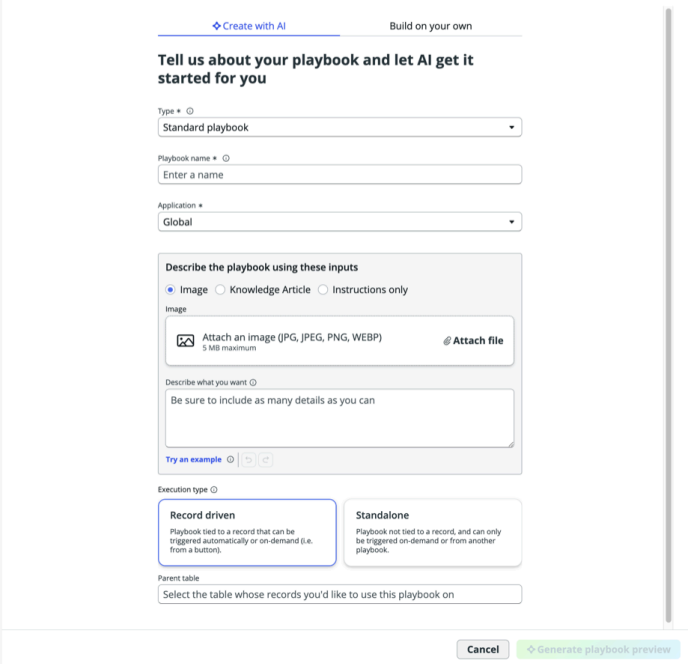
Activation

Playbook generation is a skill that is installed with the ServiceNow Otto for Creator (sn_now_creator) application. You can install this application from the ServiceNow Store website. You must enable the Playbook generation skill to generate playbooks using AI.

Supported user interfaces

Access the Playbook generation skill when you're creating a playbook in Workflow Studio.





Writing prompts

Follow these guidelines when writing prompts to generate playbooks.

Provide a meaningful name for the playbook

The more descriptive the playbook name is, the better the playbook that AI can create.

Be precise and descriptive in the directions

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Describe each stage and activity in as much detail as you can.
- Specify the order that stages and activities run in.
- Specify if any stages or activities run at the same time.

Use clear images

Use high resolution images with clear shapes, text, and arrows. Avoid using blurred screenshots and images of unclear whiteboard diagrams.

You can use one image of up to 10 MB, in JPG, JPEG, PNG, or WEBP format.

Experiment with prompts

Save your prompts somewhere, including any modified versions. Saving your prompts enables easy comparison of results.

Note: Prompts used only to generate a preview aren't saved, but prompts used for a saved playbook outline are in the playbook's Properties setting.

Reviewing playbooks

Follow these guidelines to review the generated playbooks.

Check for accuracy

Review each stage and activity in a generated playbook to determine accuracy, efficiency, and how well it outlines your business process.

Configure placeholder activities

Configure placeholder activities before you activate your playbook. Use playbook recommendations to help choose activity definitions.

Configure the activity definition in the activity side panel

Retrieval Augmented Generation (RAG) support

Playbook generation uses Retrieval Augmented Generation (RAG) to include the names of active actions, subflows, flows, and activity definitions available on your instance. Workflow Studio updates the list of active actions, subflows, flows, and activity definitions every hour to make them available to playbook generation. You can refer to active actions, subflows, flows, and activity definitions by name in your playbook generation inputs.

Example prompts

The following examples can help you to generate playbook outlines:

Example playbook prompt 1: Employee onboarding

You can use this prompt to create a playbook for the onboarding process of new hires.

```
Create an employee onboarding playbook that integrates
 new hires into the organization.
```

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

```
HR initiates it upon job offer acceptance, gathering
 documents, assigning mentors, providing orientation,
setting up IT access, ensuring compliance, and
 job-specific training. The playbook ends with feedback
 from the employee and HR,
resulting in an onboarding checklist.
```

Example playbook prompt 2: Customer support

You can use this prompt to create a playbook with the steps that an agent takes for customer support cases.

```
Create a customer support playbook which is the primary
 point of contact for handling customer inquiries,
problems, and requests. It starts by receiving and
 categorizing customer inquiries based on urgency and
 complexity.
Support tickets are then assigned to agents who
 troubleshoot and resolve them, with the option to
 escalate to higher
support tiers if needed. After resolution, follow-up
 with the customer is crucial. A satisfaction survey
 gathers feedback for
improvement, and all interactions are documented,
 updating the knowledge base for future reference.
```

Example playbook prompt 3: Travel reimbursement

You can use this prompt to create a playbook to manage employee travel expenses.

```
Create a travel expense reimbursement playbook for
 managing employee travel expenses efficiently.
Employees submit expense reports with valid receipts.
 Finance verifies expenses against policies, ensuring
 budget compliance.
Managers approve expenses, initiating payment
 processing.
```

Example playbook prompt 4: Control document

You can use this prompt to create a playbook to manage a control document.

```
Create a playbook for generating, reviewing, and
 approving a control document. Suppliers and Quality
 managers collaborate
to upload documents and conduct appropriate refinement
 before a final document is approved.
```

Example playbook prompt 5: Supplier evaluation

You can use this prompt to create a playbook to evaluate whether potential suppliers meet qualification standards.

```
Create a playbook for qualifying a new supplier.
 Suppliers request qualification. Quality managers
 review and approve
qualification requests, plan qualification
 deliverables, execute qualification activities, and
 summarize qualification findings in a report.
The playbook concludes by determining if the supplier
 has achieved the requested qualification.
```

Example playbook prompt 6: Hardware inventory

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

You can use this prompt to create a playbook to manage hardware inventory.

```
Create a playbook that manages hardware inventory. This
 playbook should efficiently track stock levels, update
 in real-time,
and generate alerts for low inventory. It must support
 categorization, bar codes, and seamless integration
 with sales and procurement systems.
```

Related topics

Generate a playbook from text or image

Generate a playbook from text or image

Generate a playbook using AI by providing text directions or an image.

https://player.vimeo.com/video/982759426?h=24780a7fa3&badge=0&autopause=0&player_id=0&app_id=58479

Before you begin

Verify that the ServiceNow Otto for Creator plugin is installed and the **Playbook generation** and **Playbook generation with images** skills are turned on. For more information about turning on the AI skills for Playbooks, see Turn on AI skills for Playbooks.

Note: AI skills are available in **Admin** > **AI Admin Hub** > **AI Skills** > **Creator**.

For information about installing ServiceNow Otto for Creator, see Install ServiceNow Otto for Creator

Learn how to write prompts to generate better playbooks. For more information, see Writing prompts.

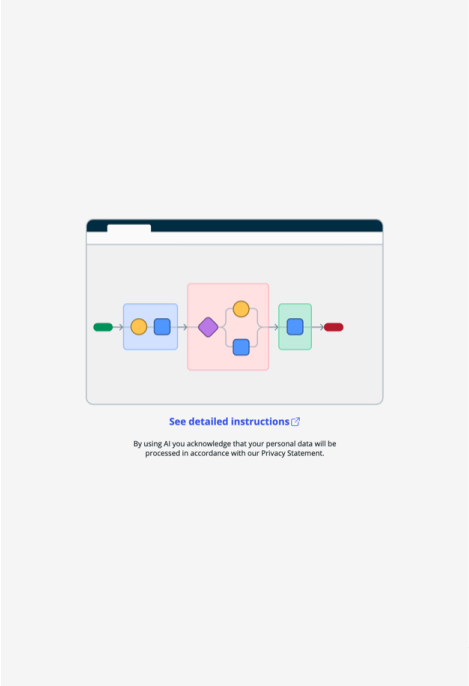
Role required:

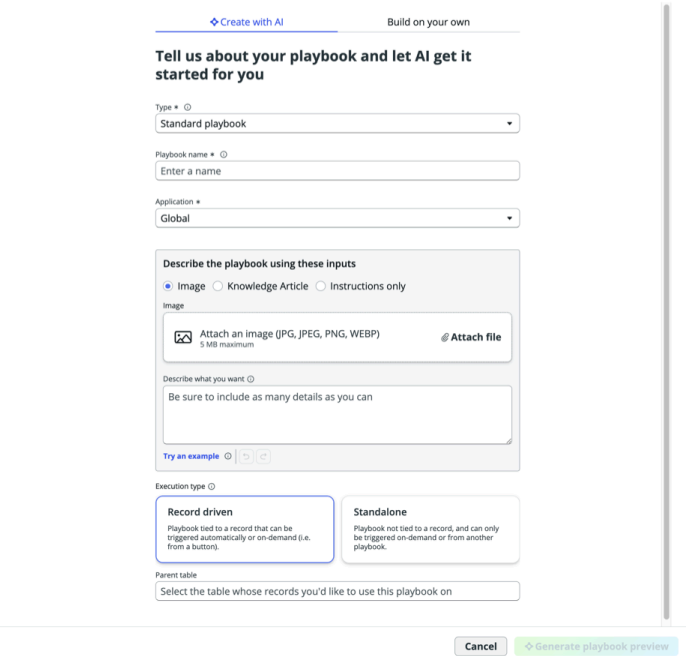
- admin, playbook.admin, pd_author, or a delegated developer permission

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the **New** drop-down menu, select **Playbook**.
3. On the **Create with AI** tab, fill in the following fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.





Field	Description
Type	Type of the playbook you want to create. Select **Standard playbook** for most day to day processes.
Playbook name	Unique, user-facing name for your playbook. This name also appears to agents and fulfillers during runtime.
Application	Application scope that you want your playbook to run in. Selecting **Global** lets your playbook run in any application scope. For more information, see Application scope. **Important:** You can't change the application scope of a playbook after you've generated a preview for it.
Describe the playbook using these inputs	Directions for the playbook that you want to create. **Image** Attach a high quality, clear image of the process. You can compliment the image with text instructions as well. For example, if you attach an image of a flow chart, you can add additional information about the process as text directions. **Knowledge Article**

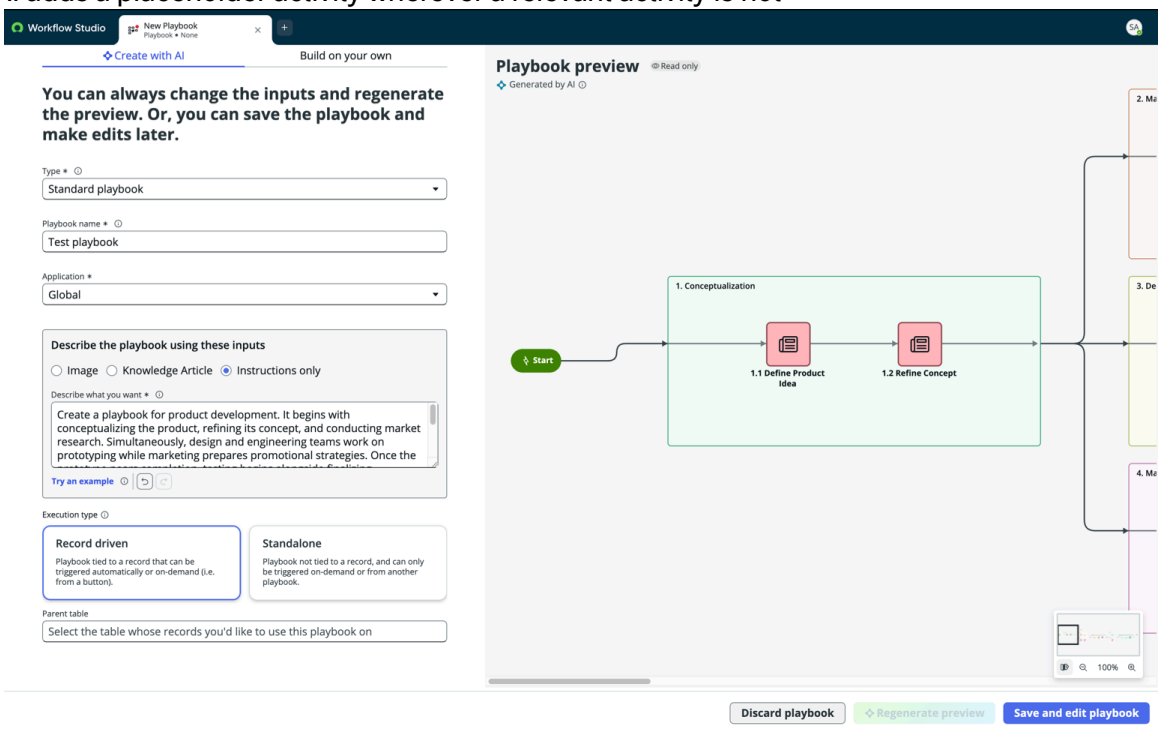
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Select a knowledge article based on which you want to generate a playbook. Additionally, you can add instructions in the text box to compliment the knowledge base article. **Instructions only** Provide only text instructions to generate the playbook. ○ Describe each stage and activity in as much detail as you can. ○ Specify the order that stages and activities run in. ○ Specify if any stages or activities run at the same time.
Execution type	The type of playbook you want to create. **Record driven** The playbook is tied to a record. It is triggered on demands, or automatically based on the record operations. Any data that comes from the playbook will also be stored on that record. **Standalone** Single session playbook that don't store data to a record. These must be manually triggered or called from another playbook.
Parent table	In case of a record driven playbook, the table where the record resides. This option is not relevant for a standalone playbook.
Additional properties	Option to allow the playbook to be publicly accessible. Once embedded it is set to available to unauthenticated users, as long as there aren't additional restrictions preventing the user from accessing the playbook. **Note:** Playbooks must be tied to a public parent table for unauthenticated users to see it in runtime.

4. Select **Generate playbook preview**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Based on your instructions, AI generates a preview of the playbook with all the elements and displays the preview in the diagramming view. AI adds a placeholder activity wherever a relevant activity is not found.



5. Review the generated playbook preview for accuracy.
   If the generated playbook doesn't meet your requirements, try rephrasing your prompt according to Writing prompts, and select **Regenerate preview**.
6. Select **Save and edit playbook**.
7. Configure your trigger.
   For more information about triggers, see Configure your trigger.
8. If the playbook contains placeholder activities, configure the placeholder activities manually.

   Tip: To generate recommendations for activity definitions from AI instead, see Generate recommendations for placeholder activities.

   a. Select a placeholder activity that you want to configure ( ).

      You can also select the **replace activity** icon ( ) in the mini-picker to directly open the activity picker.

   b. **Optional:** Update the **Label** and **Description**, if needed.

   c. Under the **Activity definition** field, select the edit button ( ).
      The activity picker opens.

   d. In the activity picker, search for the activity, subflow, or action to add.

      Note: Select the application first, and then the activity from the resulting list. For more information about subflows or actions, see subflow, or action.

   e. Configure the activity inputs.
      For more information about common activities and their inputs, see Playbooks reference.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

9. If you don't see the activity that you want to add in the activity picker, create an activity definition.
   For more information, see create an activity definition.
10. After you configure all your stages and activities, test the playbook.
11. Select **Activate** in the header.
    Activating your playbook publishes it so that it runs when triggered.

    Note: When you change your playbook after activating it, the system saves your changes but deactivates your playbook.

    To publish any new changes to your playbook, you must activate the playbook again. For more information, see Playbook statuses and activation states.

Result

When the trigger conditions of your playbook are met, playbook runs. As a result, the system creates a Process Execution record and renders user-facing configurations for Playbook Experience. For an example of how to digitize a manual business process that renders as a playbook, see Create a sample playbook.

What to do next

Design the Playbook Experience for your agents and fulfillers in UI Builder. To learn how to design and customize the runtime playbook experience in UI Builder, see Customizing the Playbook Experience.

Playbook generation from a knowledge base article

Generate a playbook directly from an existing knowledge base article to using AI reduce manual effort when creating playbooks for documented processes.

When you create a playbook from a KB article, AI reads the article, identifies the stages and activities described in the content, and generates a structured playbook. Each generated activity includes a description derived from the article content.

This feature is useful when your organization has existing KB articles that describe operational processes. Instead of recreating those processes manually as playbook stages and activities, you can use the article as the source and let AI generate the playbook structure.

How the playbook generation works

AI extracts the content of the selected KB article and combines it with any optional instructions you provide. This combined input is passed to the playbook generation skill, which identifies stages and activities, and generates the playbook structure. The generated playbook appears as a preview before you save it.

The KB article content takes priority over user-provided instructions. AI generates stages and activities only from the content in the article and does not add content from other sources.

Limitations

- The KB article must describe an actual process with discrete steps. Articles that contain only definitions, organizational charts, or reference information aren't suitable for playbook generation. If AI determines that an article does not represent a valid process, it does not generate a playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- The feature supports knowledge base articles up to 13,000 characters. For articles that exceed this limit, AI uses only the main process-relevant portions of the content.
- Only knowledge base articles that are accessible to the logged-in user are available for selection.

Related topics

Generate a playbook from a knowledge base article

Generate a playbook from a knowledge base article

Use an existing knowledge base article to generate a playbook using AI. The stages and activities are automatically populated based on the article content.

Before you begin

Verify that the ServiceNow Otto for Creator plugin is installed and the **Playbook Generation with KB** skill is turned on. For more information about turning on the AI skills for Playbooks, see Turn on AI skills for Playbooks.

Note: AI skills are available in **Admin** > **AI Admin Hub** > **AI Skills** > **Creator**.

For information about installing ServiceNow Otto for Creator, see Install ServiceNow Otto for Creator

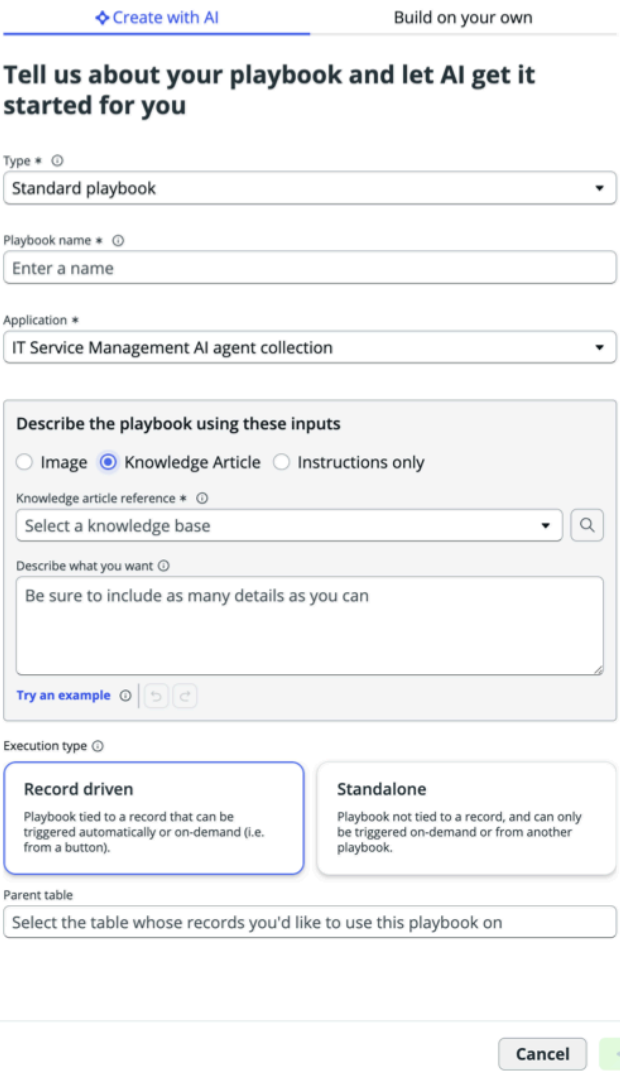
Verify that the knowledge base article describes a process with steps. Articles that contain only definitions or reference information can't be used to generate a playbook.

Role required: playbook_author.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. From the **New** drop-down menu, select **Playbook**.
3. On the **Create with AI** tab, fill in the following fields.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Field	Description
Type	Type of the playbook you want to create. Select **Standard playbook** for most day to day processes.
Playbook name	Unique, user-facing name for your playbook. This name also appears to agents and fulfillers during runtime.
Application	Application scope that you want your playbook to run in. Selecting **Global** lets your playbook run in any application scope. For more information, see Application scope. **Important:** You can't change the application scope of a playbook after you've generated a preview for it.
Describe the playbook using these inputs	Directions for the playbook that you want to create.

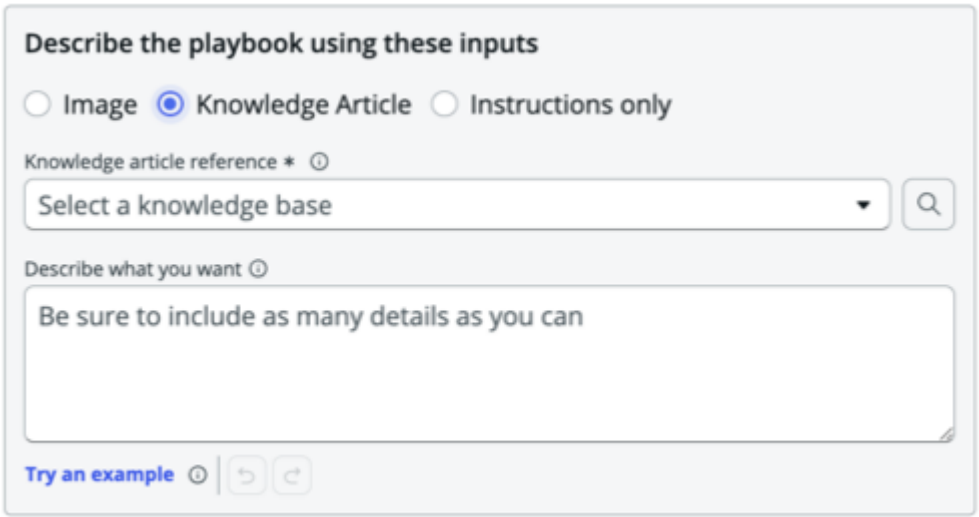
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Image Attach a high quality, clear image of the process. You can compliment the image with text instructions as well. For example, if you attach an image of a flow chart, you can add additional information about the process as text directions. **Knowledge Article** Select a knowledge article based on which you want to generate a playbook. Additionally, you can add instructions in the text box to compliment the knowledge base article. **Instructions only** Provide only text instructions to generate the playbook. ○ Describe each stage and activity in as much detail as you can. ○ Specify the order that stages and activities run in. ○ Specify if any stages or activities run at the same time.
Execution type	The type of playbook you want to create. **Record driven** The playbook is tied to a record. It is triggered on demands, or automatically based on the record operations. Any data that comes from the playbook will also be stored on that record. **Standalone** Single session playbook that don't store data to a record. These must be manually triggered or called from another playbook.
Parent table	In case of a record driven playbook, the table where the record resides. This option is not relevant for a standalone playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Additional properties	Option to allow the playbook to be publicly accessible. Once embedded it is set to available to unauthenticated users, as long as there aren't additional restrictions preventing the user from accessing the playbook. **Note:** Playbooks must be tied to a public parent table for unauthenticated users to see it in runtime.

Tip:



Use the **Knowledge article reference** drop-down list or the look up icon to find and select the knowledge article. You can select the preview icon to view the selected knowledge article in a new tab. Add additional instructions in the **Describe what you want** text field.

4. Select **Generate playbook preview**.
   The generated playbook preview displays stages and activities identified from the article content. Each activity includes a description derived from the article content.
5. Review the generated playbook preview for accuracy.
   If the generated playbook doesn't meet your requirements, rephrase your prompt and select **Regenerate preview**.
6. If you're ready to generate your playbook, select **Save and edit playbook**.

What to do next

After you generate the playbook, test and activate the playbook from the header.

Related topics

- Playbook generation from a knowledge base article
- Generate a playbook from text or image

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook recommendations for placeholder activity

Get AI-generated recommendations for placeholder activities. The system generates recommendations based on an activity's name and description.

https://player.vimeo.com/video/982759426?h=24780a7fa3&badge=0&autopause=0&player_id=0&app_id=58479

Activation

Playbook recommendations is a skill installed with the ServiceNow Otto for Creator (sn_now_creator) application. You can install this application from the ServiceNow Store website.

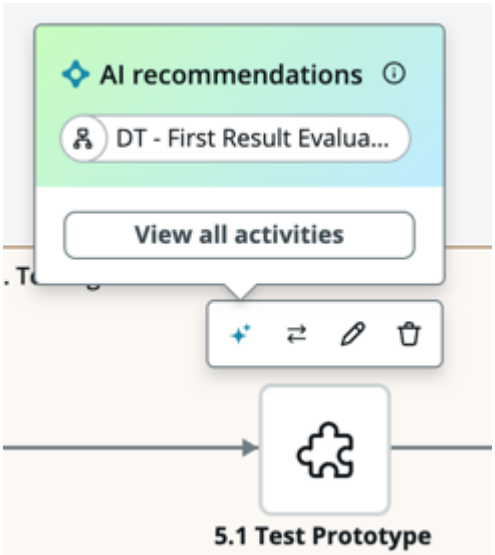
Benefits

The AI recommendations skill searched through all available activity definitions, flows, subflows, and actions on the instance. That enables quicker configuration of placeholder activities in your playbook outline, which then reduces the total time to playbook activation.

Supported user interfaces

Access the Playbook Recommendations skill from the Playbooks user interface.

Example AI recommendations



The AI recommendations skill uses the name and description of the activity to generate one to five recommendations for the activity definition to use for a placeholder activity. If there are no recommendations listed, then no activity definitions are considered relevant to the activity name and description.

The system can only recommend activity definitions, flows, subflows, and actions that are available from ServiceNow. Recommendations can't include user-created activity definitions, flows, subflows, or actions.

Generative AI model training

This Generative AI large language model was pre-trained with internal ServiceNow playbooks to learn playbook creation patterns. The goal was to understand what playbook activities are most relevant for a certain position in a playbook given the trigger and previous activities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook preference

By default, Workflow Studio shows Playbook recommendations as you configure placeholder activities in a playbook outline. You can hide these recommendations on playbook by playbook basis by turning off the Show recommendations playbook preference. See User preferences for flows for more information.

Related topics

Generate recommendations for placeholder activities

Generate recommendations for placeholder activities

Select the activity definition for a placeholder activity from a list of AI-generated recommendations. The system generates recommendations based on an activity's name and description.

Before you begin

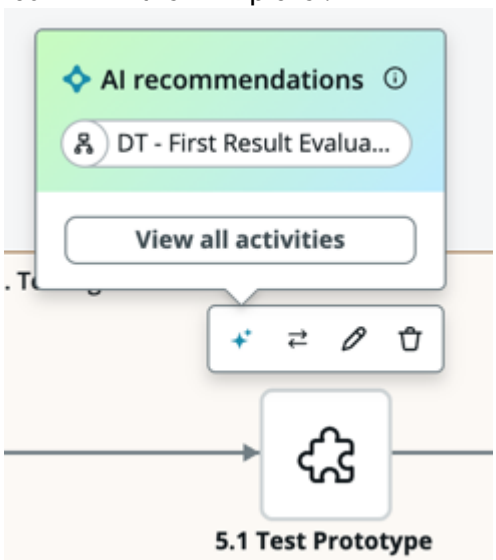
- Verify that the ServiceNow Otto for Creator plugin is installed and the **Playbook recommendations** skill is turned on. For more information about turning on the AI skills for Playbooks, see Turn on AI skills for Playbooks.

  Note: AI skills are available in **Admin** > **AI Admin Hub** > **AI Skills** > **Creator**.

  For information about installing ServiceNow Otto for Creator, see Install ServiceNow Otto for Creator
- You can only generate recommendations for placeholder activities in a generated playbook outline. To learn how to generate a playbook outline, see Generate a playbook from text or image.
- Role required:
  - admin, playbook.admin, pd_author, or a delegated developer permission

Procedure

1. Open you playbook and hover over the placeholder activity and select the recommendations icon in the mini-picker.



2. Select one of the recommended activity definitions, if appropriate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: If there are no recommendations listed, then no activity definitions are considered relevant to the activity name and description.

3. **Optional:** Try updating the **Label** and **Description** to improve results.
   a. Open the placeholder activity.
   b. Update the **Label** and **Description**.
   c. Under the **Activity definition** field, select the recommendations button ( ) to try to generate recommendations again.
   d. Select one of the recommended activity definitions, if appropriate.
4. Continue on with activity configuration from Step 8.e of the Generate a playbook from text or image procedure.

Result

When your playbook's trigger conditions are met, your playbook runs. As a result, the system creates a Process Execution record and renders user-facing configurations for Playbook Experience. For an example of how to digitize a manual business process that renders as a playbook, see Create a sample playbook.

What to do next

Design the Playbook Experience for your agents and fulfillers in UI Builder. To learn how to design and customize the runtime playbook experience in UI Builder, see Customizing the Playbook Experience.

Related topics

Playbook recommendations for placeholder activity

Preview an activity's runtime UI

See how an activity will appear to end users when the playbook runs. Use the preview to confirm the activity's appearance as you work, and adjust its configuration before you activate the playbook.

Before you begin

Role required: playbook.admin

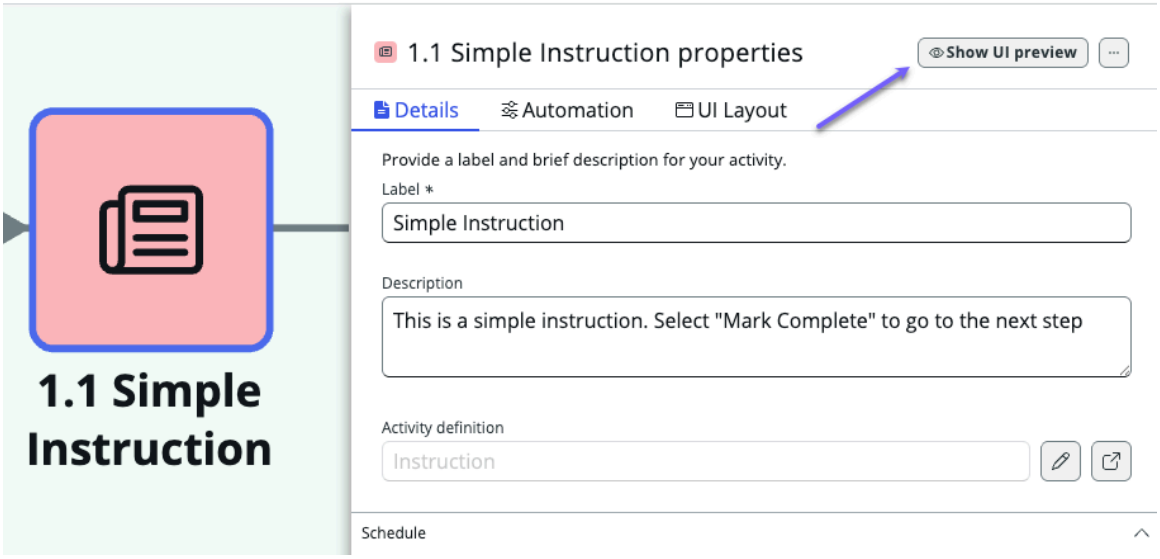
About this task

The preview appears in the activity property panel, beside the **Details**, **Automation**, and **UI Layout** tabs. It renders the activity as configured at design time. Automations don't run at design time, so a component that depends on an automation output has no data to draw on. That component isn't shown, the area collapses, and no placeholder appears in its place. A component can therefore be missing from the preview and still appear when the playbook runs. Components that draw on experience properties render as you configure them.

Procedure

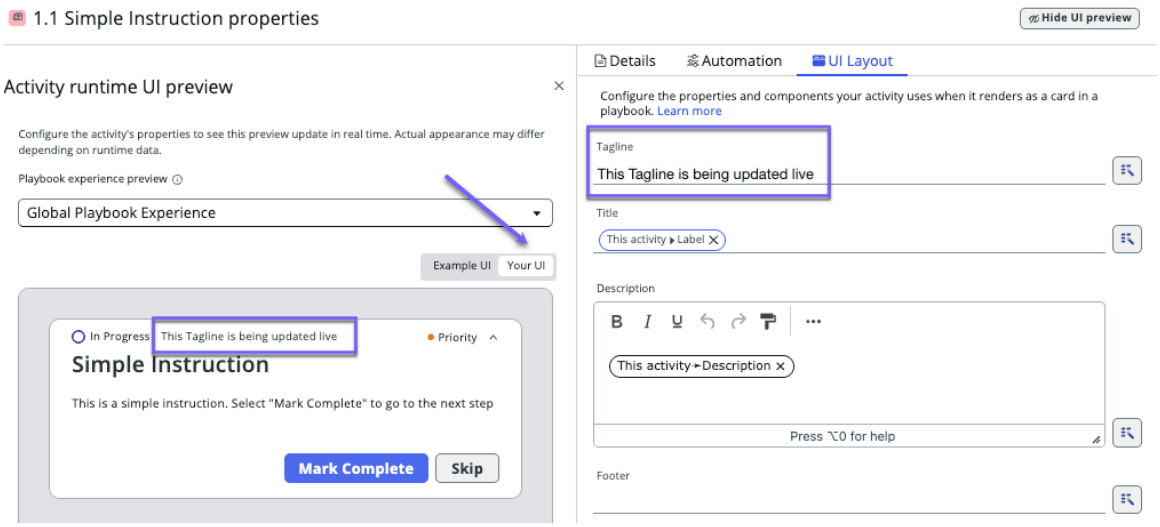
1. Navigate to **All** > **Workflow Studio** > **Playbooks**.
2. Select the playbook containing the activity you want to preview.
3. On the diagram canvas, hover over an activity card to display its toolbar, and then select the Edit UI Layout icon .
   The activity property panel opens on the **UI Layout** tab with the preview open. Selecting the Edit icon opens the panel without the preview.
4. **Optional:** If the preview is hidden, select **Show UI preview** to open it.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



The **Activity runtime UI preview** panel appears alongside the configuration panel.

5. Configure the activity's experience properties on the **UI Layout** tab.



The preview switches from **Example UI** to **Your UI** at your first change. Single-line fields such as **Title** and **Tagline** update as you type. **Description** updates when you move focus away from the field. An activity with no values in its experience property fields shows an empty card container, which is expected.

6. Add sample data that displays in the UI Layout preview for a field in an activity that uses record inputs, for example a Record Form activity.

   When a data pill can't be resolved, a sample data field appears beneath the experience property. For a record data pill, the value you supply applies to every reference to that pill in the same playbook. Sample data populates the preview only and has no effect on runtime.

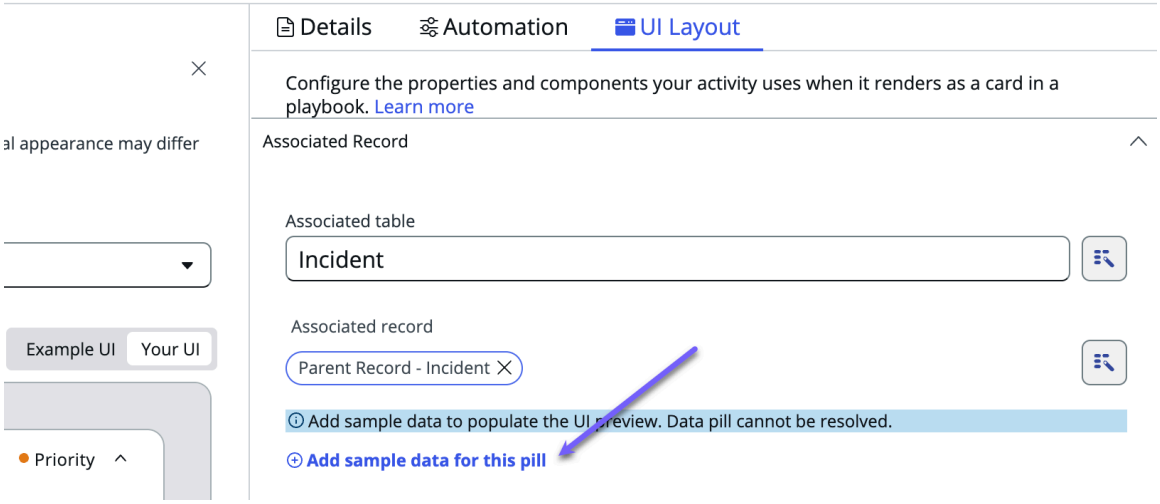
   a. In the activity property panel, select the **UI Layout** tab.

   b. Under **Associated Record**, enter a table to reference in the **Associated table** field.

   c. Select the Data pill picker icon next to the **Associated record** field.
   If the data pill can't be resolved the option to add sample data is enabled.

   d. Select **Add sample data for this pill**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



e. Select a record to use as sample data.
If you can't select a record, the record list is still loading.

f. If you couldn't select a record, select **Save and close**, reopen the activity, and then select the record.
Selecting **Save and close** also saves any other unsaved changes on the activity.

7. **Optional:** Select **Hide UI preview** to dismiss the runtime view.
8. Select **Save and close** to close the preview.

Test a playbook

Verify that your playbook works as expected by running the playbook with test trigger data. Identify and resolve all errors before activating your playbook.

Before you begin

- Create a playbook
- Role required: the admin, playbook.admin, or pd_operator roles grant users access to test playbooks and to view process execution records.
- The Playbook Experience plugin is required to preview a playbook in runtime.
- Plugin required: the Playbook Experience (sn_playbook_exp) plugin grants users access to test playbooks and to preview playbooks in runtime. Users need a role to view process execution records.

About this task

Testing a playbook bypasses the normal playbook trigger to run it with the sample data you provide. Every test you run creates or changes records on your instance. To avoid unwanted record changes, test playbooks on a non-production instance that contains relevant demonstration data.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio** > **Playbooks**.
The Playbooks landing page appears.
2. Open the playbook you want to test.
The playbook details screen appears.
3. Select **Test**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

The system displays the Test your process modal. The contents of the modal depend on the type of trigger record your playbook uses.

4. Select a playbook trigger record to use for testing.

   Note: Testing ignores the playbook trigger conditions. You can select any existing record for testing. If there are no existing records to select, you can create a test record.

   The playbook runs as if the selected test record met the playbook trigger conditions.

5. **Optional:** Create a test record.

   a. In the **Test your process modal**, select **Create a new record**.
   In a new browser tab, the system opens a create record form in the ServiceNow AI Platform.

   b. Enter the new record values.
   The fields of a record vary depending on what table your playbook is triggered from.

   c. Select **Submit**.
   The system creates the record with the values you specified.

   d. Return to the Workflow Studio browser tab with the **Test your process** modal open in the Playbooks builder.

   e. Close or cancel the **Test your process** modal.

   f. Repeat steps 2-4 and select the test record you created.

   Note: The system only displays the **Create a new record** option when there are no records in the table.

6. Select **Run Test**.
   The system runs the playbook using the record you selected as test data. When the test is complete, the system displays options to view process execution details and a playbook preview.
7. **View** the **Process execution details** for information about the playbook state, activities run, and log messages produced.

   Note: This option is only visible to users with the admin, playbook.admin, pd_operator roles.

   The system opens a Process Execution form in a new tab.
8. To see the **Playbook preview**:

   a. Select a playbook experience type.

   b. Select **View**.

   Note: This option is only visible on instances where the Playbook Experience plugin is activated.

   The system opens a sample playbook in a new tab.
9. Identify and resolve any errors in your playbook.
10. Update and test your playbook until it is ready for release.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

What to do next

Publish your playbook to a production instance and activate it.

Enabling playbook restart

Learn how playbook restart during runtime works and how restart rules control the behavior of stages and activities during a restarted run.

Playbook restart lets agents and fulfillers in Playbook Experience restart a playbook from the beginning, or from a specific stage or activity. Playbooks administrators enable restart in Workflow Studio and define restart rules for each stage and activity.

Restart is automatically enabled for new playbooks. For existing playbooks, an administrator must enable restart manually. Once enabled, restart cannot be disabled.

Restart rules

When you configure restart for a stage or activity, you define what it does when a playbook is restarted. The following rules are available:

Rule	Description
Skip on restart	The stage or activity runs only during the initial run. It does not run when the playbook is restarted. Use this rule when you don't want new tasks or records to be created during a restarted run, because the original execution and its resulting record are still relevant.
Run always	The stage or activity runs during both the initial run and any restarted run.
Skip on first run	The stage or activity runs only during a restarted run. It never runs during the initial run.

Restart states

The state of a playbook, stage, or activity determines whether it can be restarted.

A playbook can only be restarted when it is in an active state. The only active state is In Progress. Playbooks in a terminal state — Complete, Error, or Cancelled — cannot be restarted.

The opposite is true for stages and activities. A stage or activity can only be restarted when it is in a complete or error state.

Design considerations

Follow these design considerations when configuring restart for your playbook, stages, and activities.

Last stages and activities

Avoid setting the last stage or activity of a playbook to **Skip on first run** if there are no parallel stages or activities. If the playbook is restarted before the last stage or activity can run, the last stage or activity never runs.

Stages

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Avoid grouping all activities that are configured to **Skip on first run** in one (1) stage. If you do so, the stage is completely hidden the first time that it runs. The stage must run twice to become visible.

Related topics

Configure restart for Playbooks

Configure restart for Playbooks

Configure restart so that agents and fulfillers in Playbook Experience can restart a playbook from the beginning, or from a specific stage or activity.

Before you begin
Role required: pd_author

Note: Once restart is enabled for a playbook, it cannot be disabled. If you don't want agents to be able to restart a playbook or its activities and stages, do not perform the following task.

Procedure

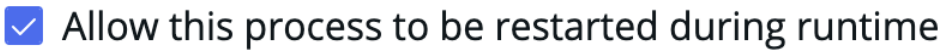
1. Enable restart for an entire playbook.

   a. Navigate to **All** > **Process Automation** > **Workflow Studio** and select **Playbooks**.
   The Playbooks list displays.

   b. Open the playbook you want to enable restart for.
   The Playbooks builder displays.

   c. In the upper right-hand corner, open the **More actions menu** , and select **Properties**.
   The **Additional Properties** modal displays.

   d. At the bottom of the **General** tab, select the **Allow this process to be restarted during runtime** box.

   Agents can now restart the whole playbook.

   Note: Restart can be enabled for activities and stages even if the whole playbook cannot be restarted.

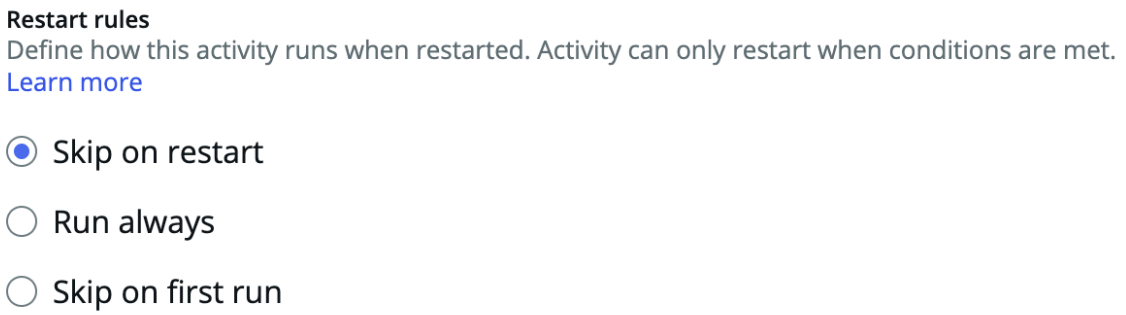
2. Define restart rules for each stage and activity.

   Note: Restart settings for a stage do not apply to its activities. Each activity also has its own restart settings.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

a. In the Playbooks builder, open the stage or activity you want to configure restart settings for.

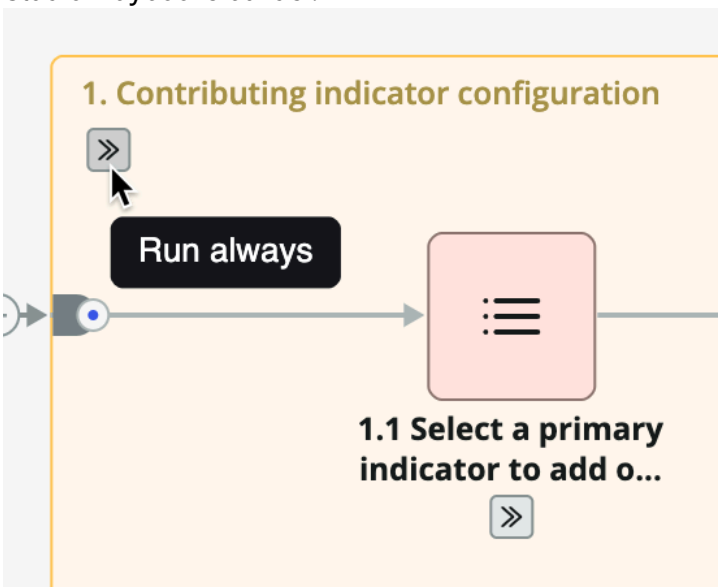
b. Under **Restart rules**, select what you want the stage or activity to do when restarted.



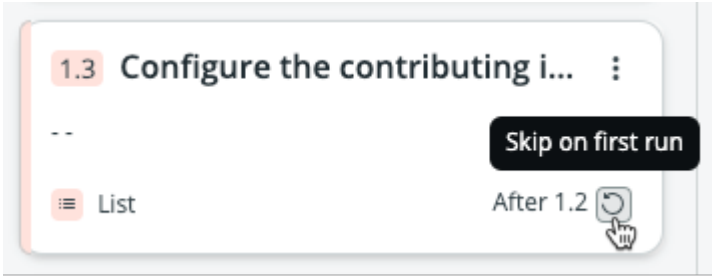
Rule	Description
Skip on restart	The stage or activity only runs during a play book's initial run. It never runs during a restart ed run. **Note:** This setting is helpful if you don't want new tasks or records to be created during a restarted run, because the origi nal execution and resulting record is still relevant.
Run always	The stage or activity always runs, whether dur ing an initial or restarted run.
Skip on first run	The stage or activity runs only during restart ed runs. It never runs during an initial run.

Your restart rules are applied.

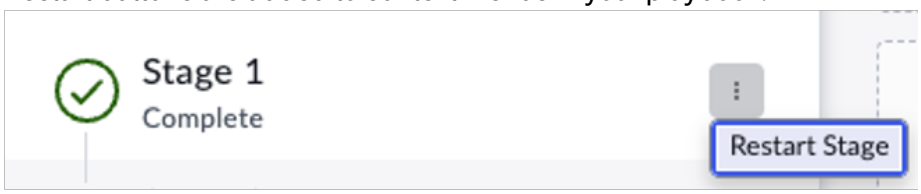
- Restart settings are reflected in both the Diagram view and Board view of the Workflow Studio Playbooks builder.



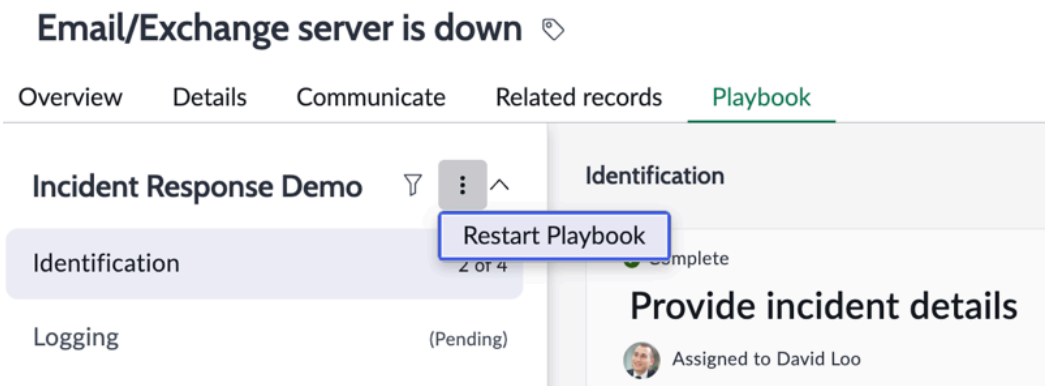
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



- Restart buttons are added to context menus in your playbook.



3. **Optional:**
   To test your playbook with the restart options, select **Test** in the upper right-hand corner and open the **Playbook preview**.



Duplicate a playbook

Make a copy of an existing playbook with the same trigger, stages, activities, and experience configurations as the original. Edit the duplicated playbook to quickly create a working variation.

Before you begin

- Activate Playbooks for your appropriate application.
- Familiarize yourself with the tables and relationships that your application uses for the playbook that you want to create.
- Make sure to Familiarize yourself with any features that your business uses to automate operations on the ServiceNow AI Platform, such as flows, subflows, and actions.
- Learn how to get started with ServiceNow® Process Automation.
- Role required: admin or playbook.admin

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio** > **Playbooks**.
   The Playbooks builder appears.
2. Select the playbook you want to duplicate.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. Check the box next to the playbook that you want to duplicate.
   Only one playbook can be duplicated at a time.
   The **Duplicate** button displays.
4. Select **Duplicate**.
   The system makes a copy of the selected playbook and opens **Duplicate playbook** modal for the new playbook.
5. Fill in the playbook properties.

Option	Description
Label	Enter a unique, user-facing name for your play book. This name appears during playbook run time.
Application	Choose an application scope that you want your playbook to run in. Selecting **Global** lets your playbook run in any application scope. For more information, see Application
Description	Optionally, enter some descriptive details about your playbook.
Trigger type	Specify what causes your trigger to fire.
Table	The table with the record operations that you want to trigger your playbook. This field can not be edited.

6. Edit the playbook stages and activities to fit the new playbook.
7. Select **Save**.

Playbook summarization

Use AI to generate overviews of a playbook's stages, activities, triggers, and inputs. Understand a playbook's purpose and flow without going into the details of what is being done at activity and stage level.

Playbooks can grow complex over time, with multiple stages and activities that make it difficult for users unfamiliar with a playbook to understand quickly its purpose and flow. The playbook summarization feature lets you generate a structured summary of a playbook's contents without manually reading through each activity.

Summaries are generated using AI and are based on the playbook's stages, activities, triggers, and inputs. You can choose from three summary formats:

Standard

A brief overview of the playbook and its stages. This is the default format.

Short

A concise, condensed summary suitable for quick reference.

Elaborate

A detailed description of the playbook flow, including stage-by-stage explanations.

After you generate a summary, it is stored and reused across sessions. If a summary already exists for a playbook, it displays automatically when you open the summary panel. You can copy or save the generated summary as the playbook description.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note: Summaries are generated by AI and may not always be accurate. Review the generated summary before using it as the playbook description.

Refining a summary

After a summary is generated, you can refine it using preset options or a custom instruction. Preset options let you elaborate or shorten the summary, or change the tone to casual or formal. You can also enter a free-text instruction that AI uses to refine the existing summary.

Detecting playbook changes

The summarization feature tracks structural changes to a playbook. If the playbook has been modified since the last summary, a warning appears in the summary panel indicating that the summary may be outdated. You can then regenerate the summary using the **Refresh** option.

Generate a playbook summary

Generate an AI-generated summary of the stages, activities, triggers, and inputs of a playbook from the Workflow Studio canvas.

Before you begin

Verify that the ServiceNow Otto for Creator plugin is installed and the **Playbook Summarization** skill is turned on. For more information about turning on the AI skills for Playbooks, see Turn on AI skills for Playbooks.

Note: AI skills are available in **Admin** > **AI Admin Hub** > **AI Skills** > **Creator**.

For information about installing ServiceNow Otto for Creator, see Install ServiceNow Otto for Creator

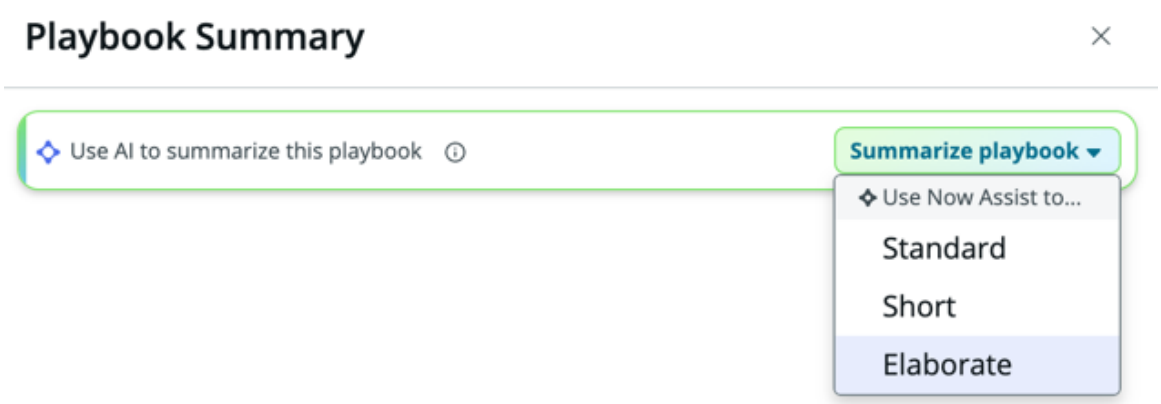
The playbook must have at least one stage and activity before a summary can be generated.

Role required: pd_author

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Open the playbook for which you want to generate the summary.
3. From the More Actions menu , select **Summarize**.
   The Playbook Summary pane displays.
4. On the Playbook Summary panel, select **Summarize playbook**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



5. Select a summary format: **Standard**, **Short**, or **Elaborate**.
   The summary is generated and displayed in the panel. The first paragraph provides a brief overview of the playbook, followed by a description of each stage.

What to do next

After generating a summary, you can perform the following actions:

- To refine the summary, enter a custom instruction in the AI chat field.
- To copy the summary to the playbook description field, select **Set as description**, then select **Save and close**.
- To regenerate the summary after playbook changes, select **Refresh**. If the playbook structure has changed since the last summary was generated, a warning appears prompting you to refresh.

Related topics

Playbook summarization

Ideal path for a playbook

The ideal path is the expected execution route through a playbook. The sequence of activities that should run when a decision resolves in the anticipated way. You can define an ideal path on each decision branch and visualize it across the entire playbook in Workflow Studio.

When a playbook contains decision activities, each decision can branch in multiple directions depending on how conditions evaluate at runtime. In most processes, one branch represents the typical, expected outcome. For example, an approval decision that is usually approved. Marking that branch as the ideal path shows the route through the decision you intend as the norm.

The ideal path has two expressions in a playbook:

In Workflow Studio

The Golden Path visualization traces a highlighted route through the canvas, following all configured ideal branches from start to end. Authors use this to confirm that their ideal branch selections add up to a coherent end-to-end path before activating the playbook.

In the playbook runtime experience

Activities that are on the ideal path behind an unresolved decision are shown to the user as conditional activities. It displays a preview of what is likely to come next, even before the decision has been evaluated. When the decision resolves

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

and execution follows the ideal path, the conditional activity becomes active. If execution takes a different branch, the conditional activity is replaced by the activity on the actual path taken.

Ideal path and decision evaluation modes

The number of branches you can mark as ideal for a given decision depends on how that decision is configured to evaluate its branches.

- **First matching branch only**: You can mark one branch as ideal.
- **All matching branches**: You can mark multiple branches as ideal. All ideal branches are shown as conditional activities in the runtime experience simultaneously.

How the Golden path visualization works

The Golden path visualization in Workflow Studio traces the ideal route through the entire playbook canvas when you enable **Golden path** from the **View options**. The following rules apply:

- The playbook must contain at least one decision that has an ideal branch configured.
- The visualization follows the ideal branch at each decision, highlighting all activities on that route in a golden color.
- If a decision in the sequence has no ideal branch configured, the golden path highlighting stops at that decision. Activities after that point aren't highlighted, even if later decisions in the playbook do have ideal paths defined.
- For decisions with multiple ideal branches configured, the golden path highlights all ideal branches from that decision forward.
- The visualization updates when you undo or redo changes to ideal branch selections.
- The visualization persists when you switch between playbook variants.

How conditional activities work at runtime

Conditional activities are the runtime expression of the ideal path. They are shown as previews in the playbook execution view for activities that have not yet active because the decision that gates them has not yet resolved.

- Conditional activities are read-only. Users can't interact with them until the decision resolves and execution reaches them.
- When the decision resolves and execution takes a non-ideal path, the conditional activity is removed and the activity on the actual path is shown instead.
- If the non-ideal path itself contains further decisions, those decisions can also have ideal branches configured, and their conditional activities are shown from that point forward.

Conditional activities are displayed only when the ideal path feature is enabled on the playbook experience record. By default, activities behind unresolved decisions aren't shown at runtime.

To learn about how to configure ideal path for a playbook in Workflow Studio, see Configure the ideal path for a playbook.

Configure the ideal path for a playbook

Mark one or more decision branches as the ideal path in Workflow Studio for a playbook. The playbook can highlight the expected execution route and show users a preview of upcoming activities at runtime.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Before you begin

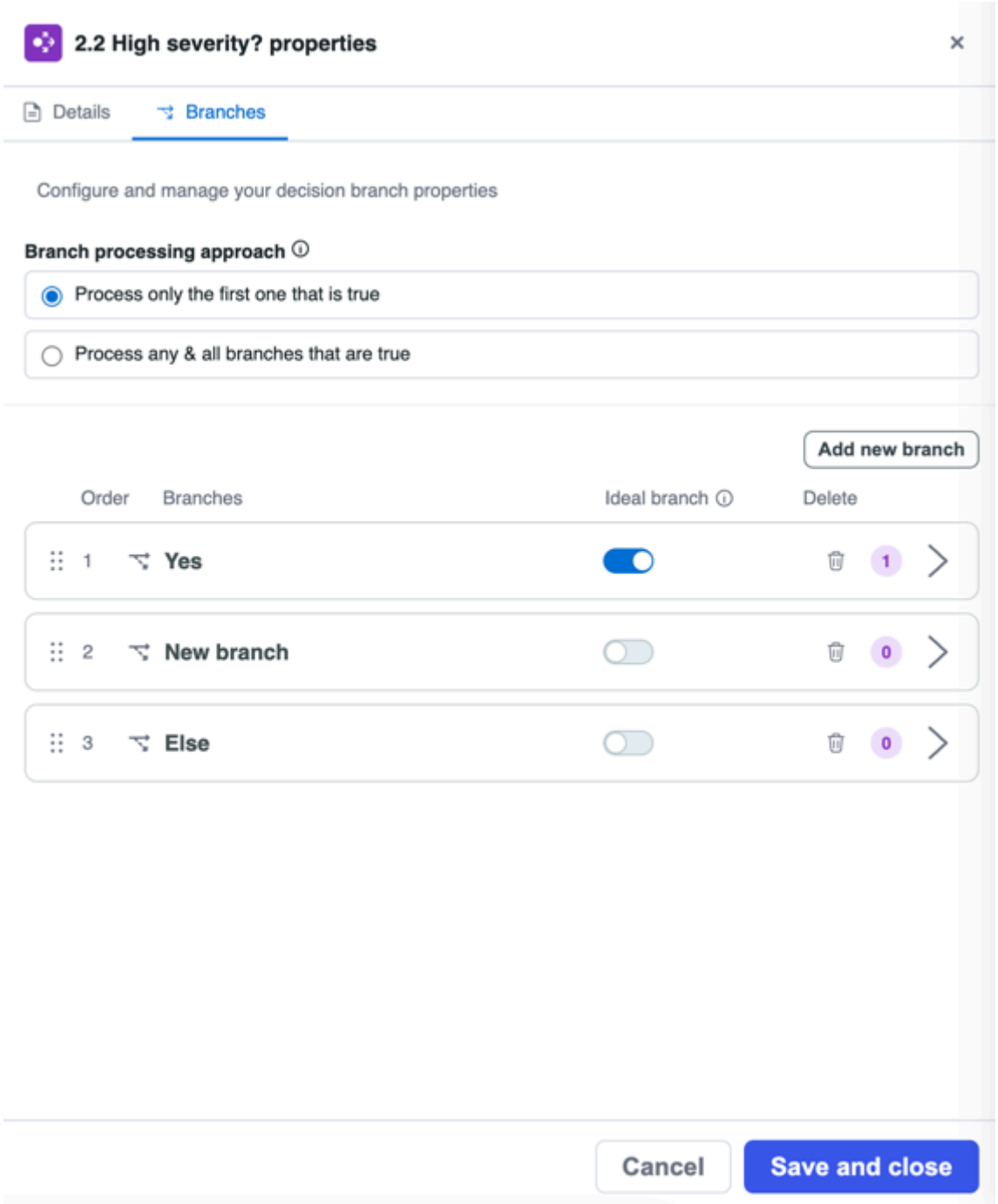
The playbook must contain at least one decision activity before you can configure an ideal path.

For more information about ideal path, see Ideal path for a playbook.

Role required: admin, playbook.admin, pd_author, or playbook.write.

Procedure

1. Navigate to **All** > **Process Automation** > **Workflow Studio**.
2. Open the playbook for which you want to configure the ideal path.
3. Enable **Ideal branch** for all decision activities in the playbook.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If you have more than two branches in a decision, depending on the selected **Branch processing approach**, you may be able to select one or more branches as the ideal branch.

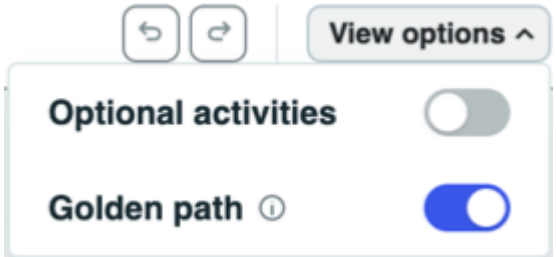
Option	Description
Process only the first matching branch	Only one branch can be marked as ideal. Use this when the decision should resolve into a single outcome.
Process all matching branches	Multiple branches can be marked as ideal. Use this when more than one branch can rep resent an expected outcome.

a. Select a decision activity.

b. In the **Branches** tab, under Branches, enable **Ideal branch** for the branch or branches that represent the expected execution path.

c. Select **Save and close**.

4. To view the ideal path of execution for the playbook, from the toolbar, select **View options** > **Golden path**.



The ideal path of execution is highlighted on the canvas.

What to do next

Configure Playbook Experience to display the ideal path activities and stages before they are executed at runtime. For more information, see Configure Playbook Experience to display ideal path.

Configure Playbook Experience to display ideal path

Configure Playbook Experience to show the stages and activities in an ideal path before they are executed during a playbook run.

Before you begin

Configure the ideal path in the playbook. To learn more, see Configure the ideal path for a playbook.

Role required: admin

About this task

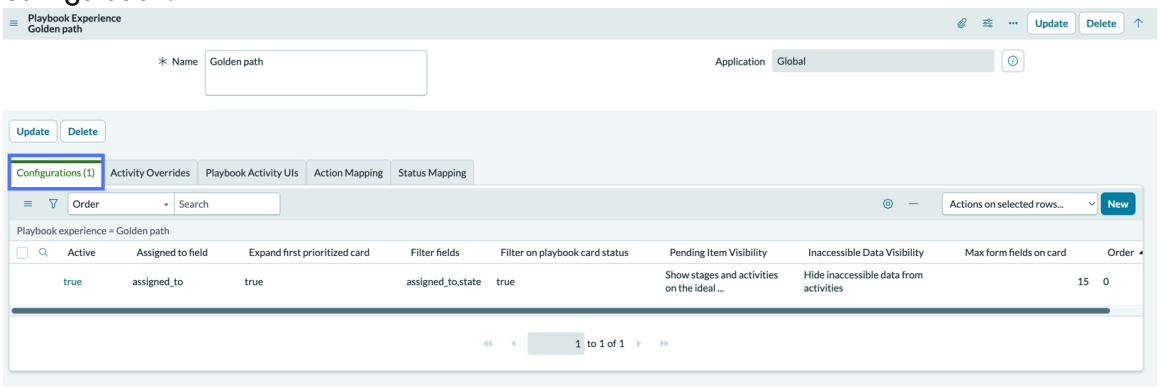
You can configure Playbook Experience to display conditional stages and activities in an ideal path. During a playbook run, the unresolved decision are shown to the user as conditional activities. It displays a preview of what is likely to come next, even before the decision has been evaluated. This informs the fulfillers about the ideal execution path of the playbook. For more information about ideal path, see Ideal path for a playbook.

Procedure

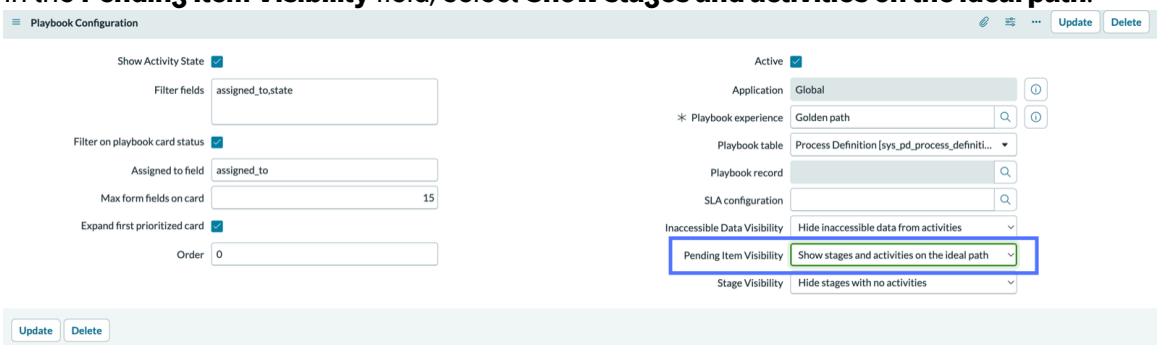
1. Navigate to **All** > **Playbook Experience** > **Playbook Experiences**.
2. From the list, select a Playbook experience where you want to configure ideal path visibility.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

3. In the **Configurations** list, select an existing configuration or select **New** to create a configuration.



4. In the **Pending Item Visibility** field, select **Show stages and activities on the ideal path**.



5. Select **Update** or **Submit**.

What to do next

Deploy a playbook with ideal path and the configured Playbook Experience.

Add translations for Playbooks

Make Playbooks available in multiple languages during runtime, to support worldwide business processes.

Before you begin

- Role required: admin or playbook.admin
- To enable custom translations for playbooks, install the 27.1 app version or later.
- Activate any playbooks that you want to translate.
- To learn more about translating custom content in general, see Translating custom content.

About this task

UI Message records are used to translate the text in your playbooks to different languages at runtime, similar to the way system messages are translated on the platform. To learn more about the Message table [sys_ui_message] in general, see Message table.

The playbook text that you can create translations for are:

- Playbook Label
- Stage Label
- Activity Label
- Activity Description
- HTML and string Activity UI Layout properties

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

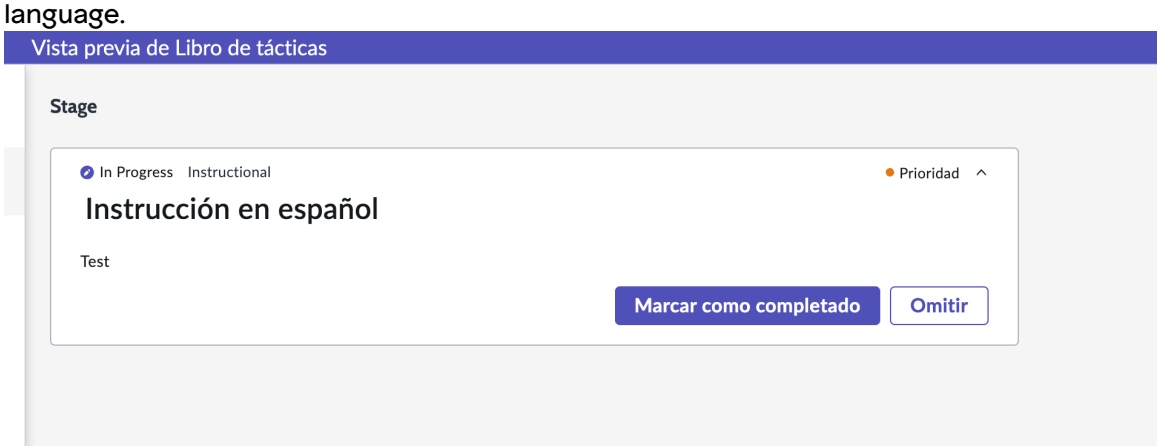
Note: Automation inputs such as text used to create emails or records are not translated. Only text that is shown at runtime within a Playbook Experience is translatable.

Procedure

1. Navigate to Workflow Studio, open playbook, activate playbook.
2. Open the **All** menu.
3. In the filter bar, type and enter **sys_pd_process_definition.list**.
4. Select the playbook that you want to add translations for.
5. Open the **Translated Messages** tab.
   All of your playbook text is listed here.
6. Open a piece of text that you want to translate.
7. From the **Language** drop-down, select the language that you want to translate to.
8. In the **Message** field, enter the translation.
9. Right-click on the form header to open the context menu, and select **Save**.
   Your translation is saved.
10. Repeat steps 1-8 to add more translations.

Result

When the playbook runs, the translated content appears for agents in their user session language.



Designing Playbook Experience

After building playbooks in Workflow Studio, Playbook Experience administrators can configure the layouts and further customize playbook functions during runtime.

There are many different ways that a Playbook Experience admin can customize the layout of a playbook during runtime. Playbooks can be designed and customized in UI Builder for:

- configurable workspaces
- Service Portal
- ServiceNow Mobile Platform

Once customized to your satisfaction, mobile playbooks must be embedded. There are no additional steps needed before end users can run playbooks in configurable workspaces or Service Portal.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Customizing the Playbook Experience

Customize the layout of your Playbook Experience with base system modular components, templates, and more via integrated UI Builder functionality.

Build custom experiences for your agents and fulfillers with the modular components in the Playbook Experience apps. To speed up the development process, add the Custom Layout UI Controller to pages where you want presets to auto-populate inputs for the provided components.

Note: You can also create your own custom components with UI Builder, but presets cannot auto-populate custom components with data.

Components

Determine how to display these modular components in your Playbook Experience:

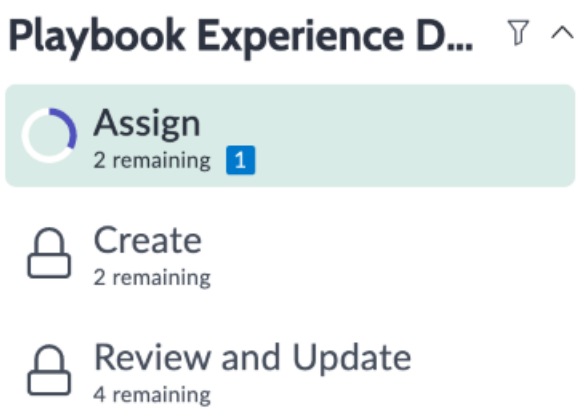
Playbook stage picker

The stages of a playbook can be displayed horizontally or vertically:

- The vertical orientation shows:
  - All playbooks for a parent record,
  - The stages of each playbook,
  - How many activities remain to be completed in each stage, and
  - How many activities are in progress for each stage.

  In this example, a playbook named **Playbook Experience Demo** with stages named **Assign**, **Create**, **Review and Update** is shown. The **Assign** stage has 2 activities left to complete, with 1 in progress. The **Create** and **Review and Update** stages don't have blue numbers next to them, so they don't have any activities that are in progress.

  Vertical stage picker

- The horizontal orientation only shows the stages of a selected playbook. To see the activities of a stage, select the stage.

  Horizontal stage picker

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbooks with more than 5 stages paginate.

Note: The horizontal stage picker only shows you the playbook you are in and its stages, so you can't navigate between playbooks unless you:

- Use a playbook template, or
- Create your own drop-down component with UI Builder.

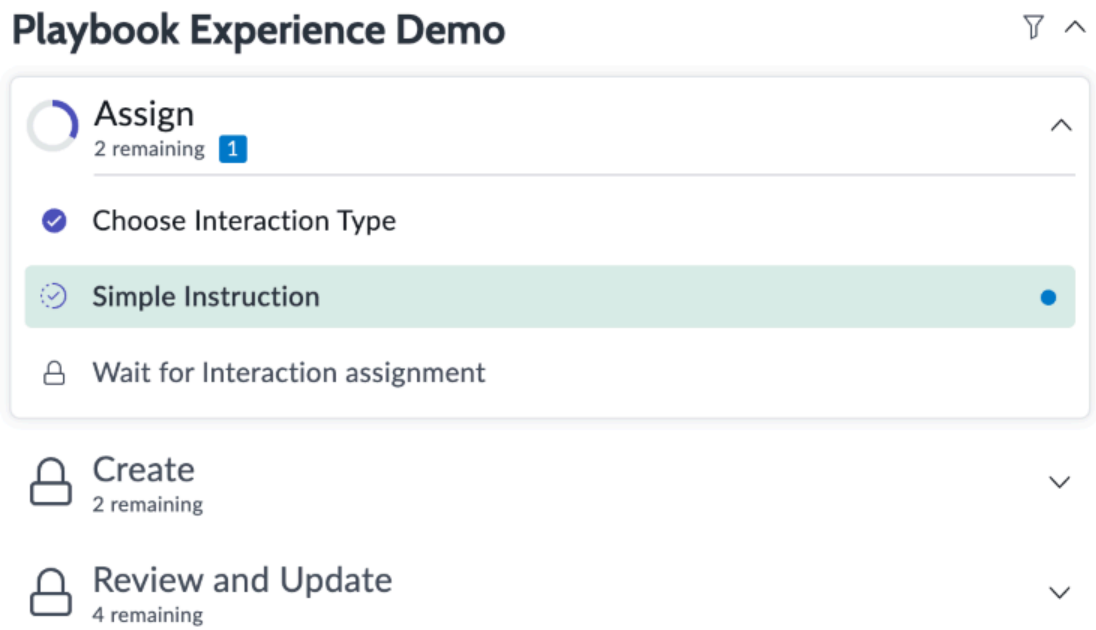
All playbook templates include a drop-down component to navigate between playbooks, and is auto-populated when you select the **Playbook Picker** preset.

Playbook activity picker

The activity picker is where you navigate between activities.

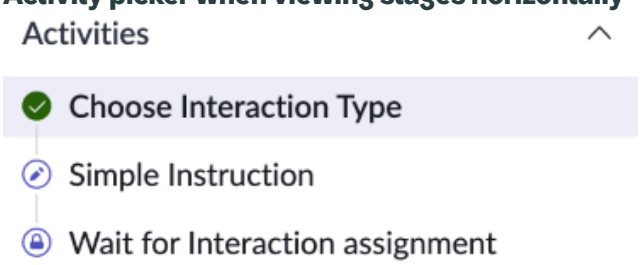
If you're using the vertical stage picker, turning on the activity picker means each stage can be expanded to shows its activities.

Activity picker when viewing stages vertically



If you're using the horizontal stage picker, turning on the activity picker allows you to expand or collapse the entire list of activities for the stage you're in.

Activity picker when viewing stages horizontally



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

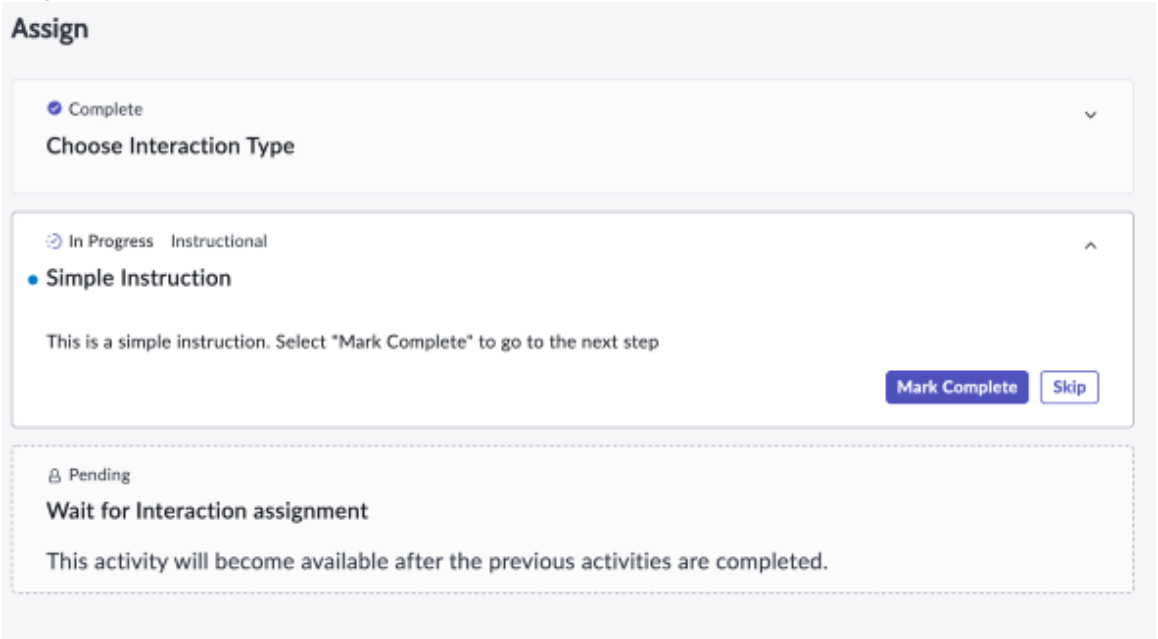
To toggle the **Show Stages flag** flag on or off, .

Playbook activity viewer

The activity viewer is where you manage a stage's activities. You can change the way activities are displayed in this space:

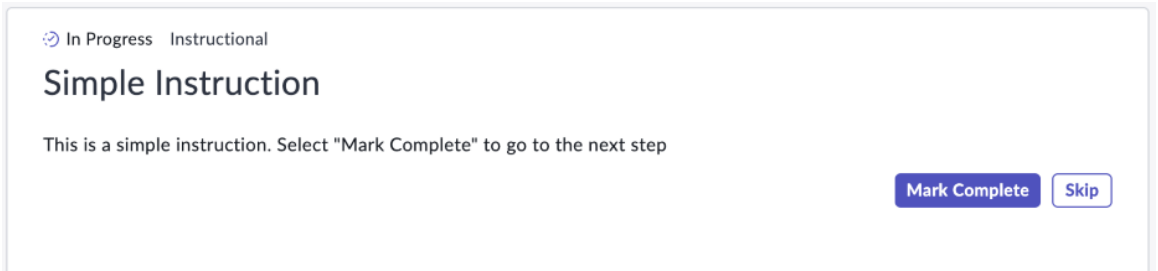
- The **Stacked** view displays all activities in a stage stacked on top of each other.

Playbook stacked view



- The **Focused** view displays a single selected activity.

Playbook focused view



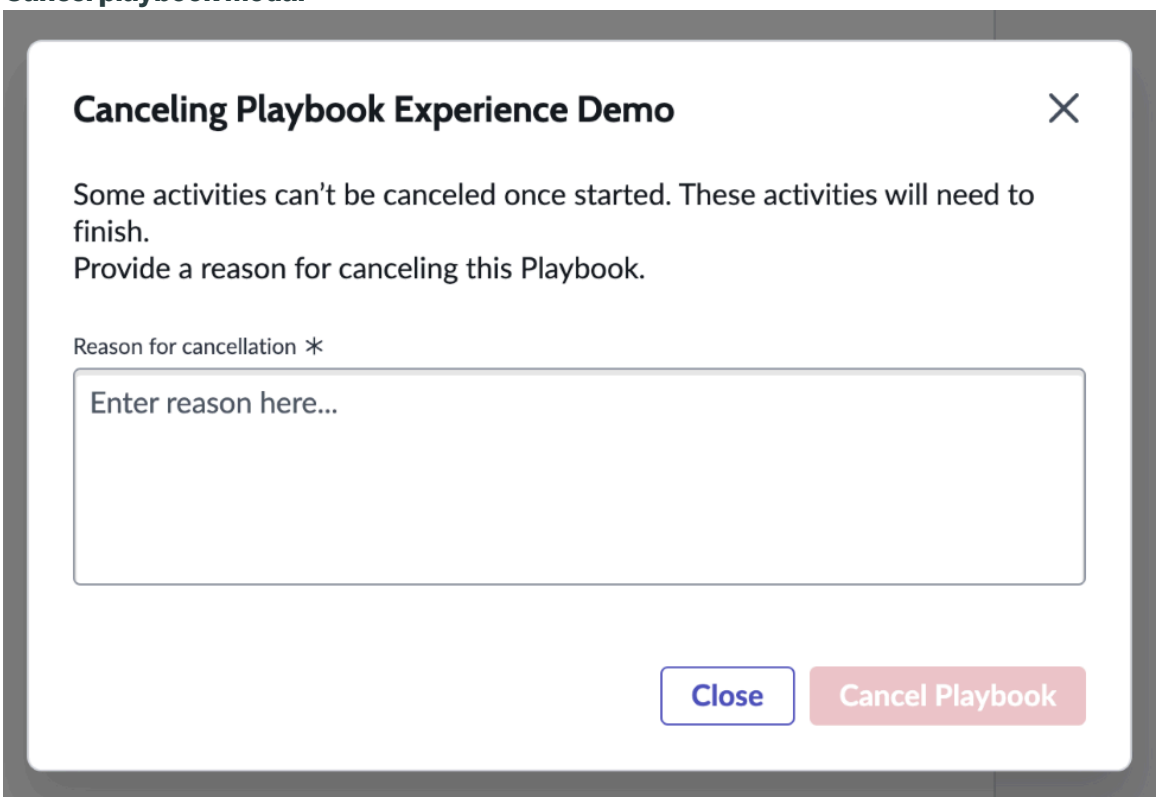
- The **Guided** layout
- The **Wizard** layout

Playbook modals

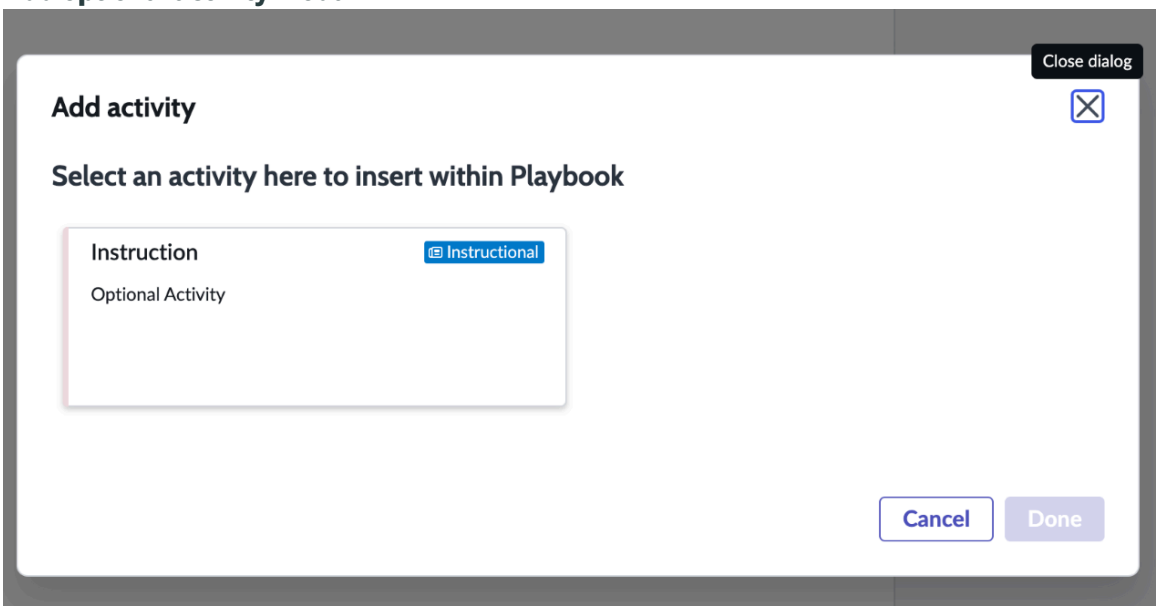
If you want the ability to cancel playbooks and add optional activities, you must add the **Playbook Modals** component to your pages. If you use a template, this is already included.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Cancel playbook modal



Add optional activity modal



To start setting up components for your customized Playbook Experience, see Customize a playbook in UI Builder.

Provided UI Builder Bundles

If adding each component individually isn't ideal, you can also add an entire layout to a new or existing UI Builder template.

- Focused Vertical
- Focused Horizontal
- Stacked Vertical

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Stacked Vertical
- Guided Decision
- Wizard

Each layout contains the following components:

- UI controller
- Presets
- Activity viewer
- Activity picker
- Modals
- Playbook picker
- Stage picker
- Client scripts

To add a bundle to an existing or new UI Builder page, see Add a custom layout bundle to a UI Builder page. If you're creating a new experience and want to add a bundle to a standard record page, see Add a custom layout bundle to a UI Builder standard record page.

Customize a playbook in UI Builder

Use UI Builder pages and modular components for custom playbook layouts to customize the end user's Playbook Experience in a configurable workspace, Service Portal page, or mobile web page.

Before you begin

- If you don't have a playbook to apply custom layouts to, build a playbook. To learn more, see Building Playbooks.
- Install the latest version of the Playbook Experience and Playbook Experience Component apps from the ServiceNow Store. See Playbook Experience apps.

Role required: ui_builder_admin, admin

About this task

After creating a UI Builder page, you can customize Playbook Experience pages to your needs. Page templates include controllers that can be used with component presets, including the playbook templates. See Bind data to UI Builder pages using controllers (advanced feature) for more information.

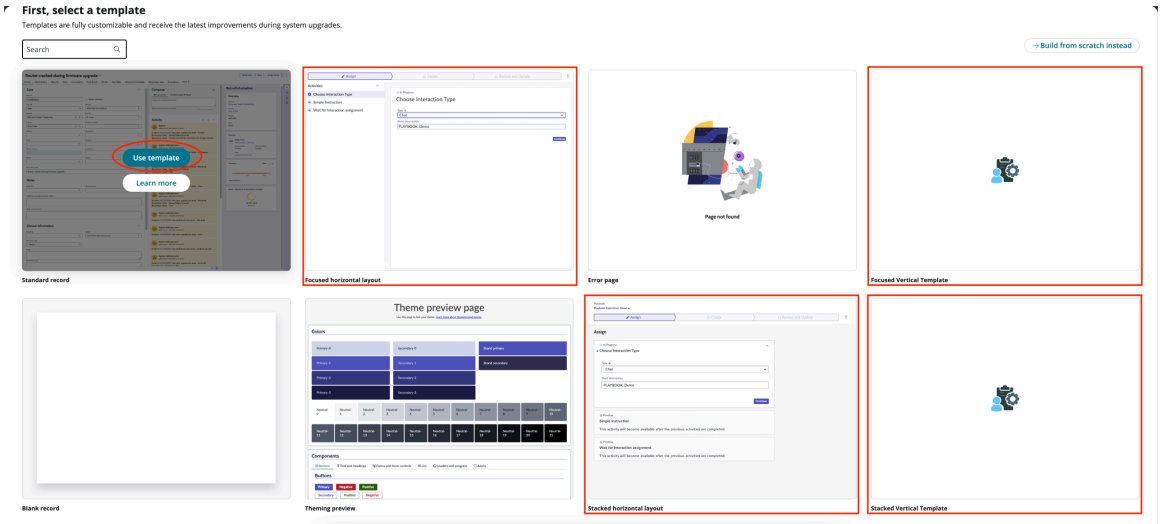
Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. Open the **UI Builder** experience that you want to work in, or create a new experience. The **Playbook Experience Builder** experience was built for you to customize Playbook Experience. For more information on how to create an experience, seeConfigure how users interact with your applications in UI Builder
3. In your **UI Builder** experience, you can:
   - Create a page from scratch,
   - create a page from a **Standard record** template,
   - or create a page from a Playbook Experience template.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Using a Playbook Experience template speeds up the development process, because the Playbook Custom Layout UI Controller and components are already added to every page, including record generators as of version 25.2. The controller automatically populates all the provided components with data.

Note: You can still create and add custom components when you use a template.



4. If you're using a Playbook Experience template, **Create** your page.

   a. Set up the page details.

Name	The name of your page.
URL Path	The URL path that users navigate to, to access the page.

   b. Review the testing parameters for your page.

table	Name of the parent table for the playbook.
sysID	Sys_id of the record. For a record that doesn't exist, the value is **-1**.
experience	The experience you want to load.
selectedPlaybook	The playbook the agent or fulfiller is in.
selectedStage	The stage the agent or fulfiller is in.
selectedActivity	The activity the agent or fulfiller is in.

   c. Set up your default page variant.

Name	The name of your page variant.
Audiences	The users that can see your page variant. They can be defined by:

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

	▪ Role ▪ Group ▪ User ▪ Company ▪ Department ▪ Location ▪ Script
Conditions	Conditions that determine when the page variant is shown.

d. Open the default page variant you just created.

The new Playbook Experience layout already includes controllers and components populated with data, but there are a few more configurations to make. To make the remaining configurations, go to step 6.

5. If you used the **Standard record** template or created your page from scratch, add the Playbook Custom Layout UI Controller to the page.

a. From the bottom corner of your new page, select the data icon ( )

b. Select **+ Add**.

c. Search for "Playbook".

d. Under **Data resources**, select **Playbook Custom Layout UI Controller** and click **Add**.

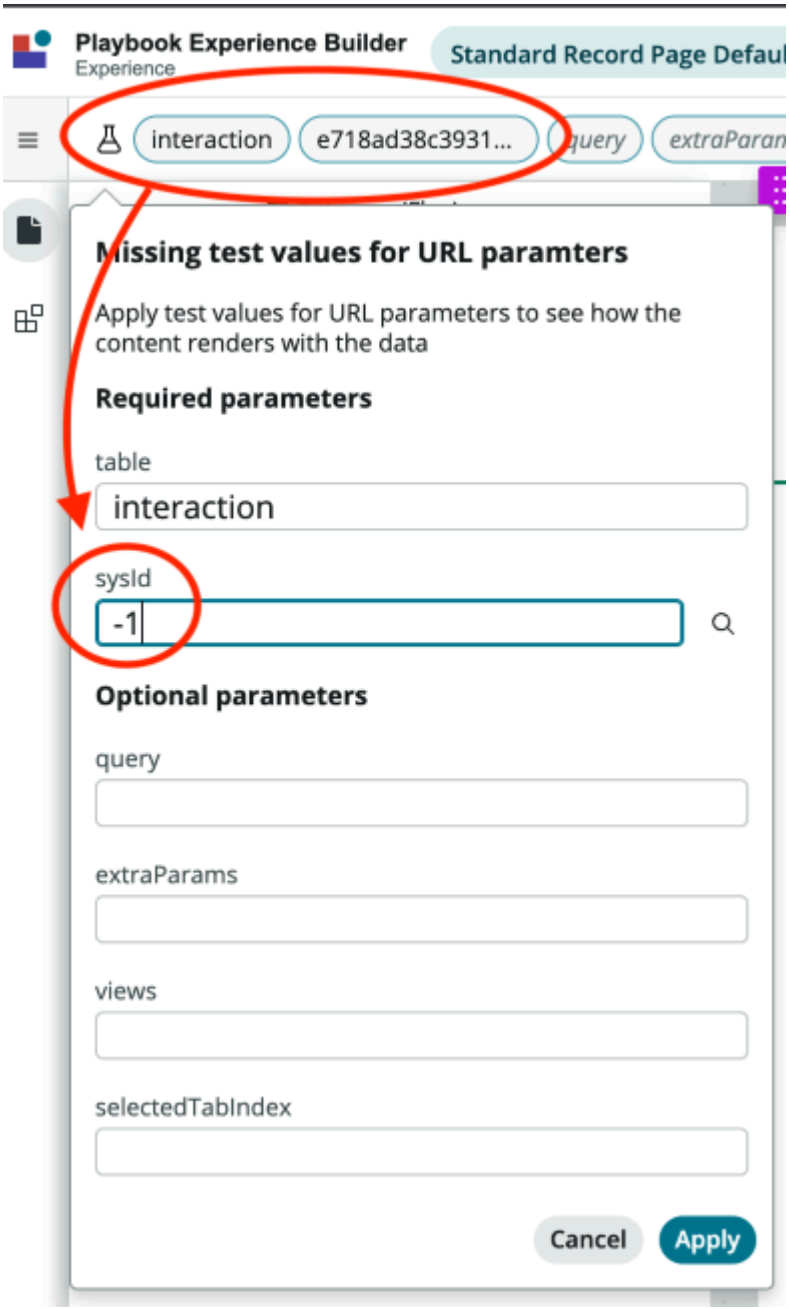
e. Exit the **Data resources** panel.

6. Configure the Playbook Custom Layout UI Controller you just added.

a. To allow users to create a new record in this customized Playbook Experience instead of the standard new record form, select a test value pill in the upper left.
The test values popover opens.

b. Make sure the **sysID** test value is set to **-1**, and select **Apply**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



A record generator form is available when you open the preview. You should be able to test the record generator form and confirm that new records are created.

c. You can also update the **table** name or any of the optional parameters:

d. Optional: If you want to hard-code the test values instead, navigate back to **Data** > **Data resources panel** > **Local data resource instances**, and select **UI Controller Record Page**.

e. Under the **Config** tab of the controller, add the **Parent SysID** or **Parent Table**.

In the test values popover, these are the **sysID** and **table** fields.

You can enter **context.props.table** in the **Parent Table** field, and **context.props.sysId** for the **Parent SysID** field.

Note: Make sure whatever table or record you enter has a playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

f. Add the **Playbook Experience** you want to use.

g. **Optional:** Enter values for the other fields, if needed.

Activity View Mode	View mode used to render Playbook activities in stacked or focused mode
Record Generator Query	Encoded Query string to optionally override the query provided for a record generator
Selected Playbook Context ID	Optional context ID of selected playbook for deep linking
Selected Stage Context ID	Optional context ID of selected stage for deep linking
Selected Activity Context ID	Optional context ID of selected activity for deep linking

h. **Optional:** In the Outputs column, you can select the values you want to hard-code.

The controller is configured and you're ready to add playbook components.

7. Add playbook components.

a. In the component tree, select the **Main Tab**.
The **Main Tab** panel opens on the right.

b. In the **Main Tab** panel, select **+ Add**.
A modal asking "How do you want to build this tab?" displays.

c. Select **Start from an empty container** and click **Next**.
A **Tab Settings** modal displays.

d. Give your tab a name and an icon, and click **Create**.
The tab is added to the component tree and a blank canvas displays.

e. In the component tree, under your new tab, select **+ Add component** and search for "resizable".

f. Select the **Resizable panes** component, give it a name, and click **Create**.

g. In the component tree, open the new **Resizable panes** component you just created.
The panel for your new **Resizable panes** opens on the right.

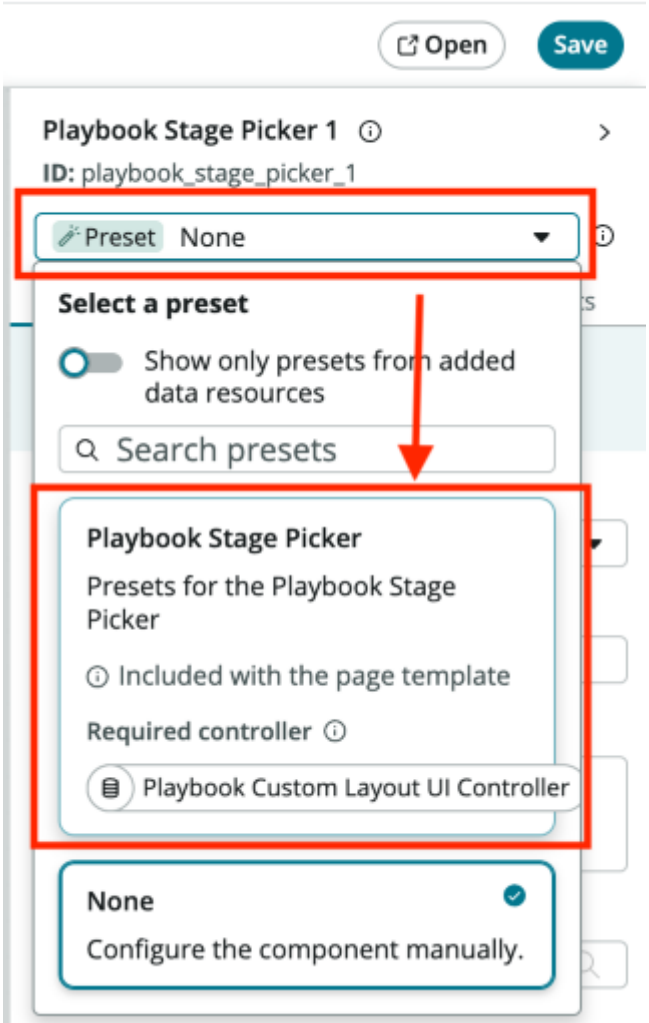
h. Configure as needed, and click **Save** in the upper right corner.

i. To add the stage picker, find your new **Resizable panes**component in the component tree, and select **+ Add component** under **left**.

j. In your component tree, select the new stage picker.
The panel for your new stage picker opens on the right.

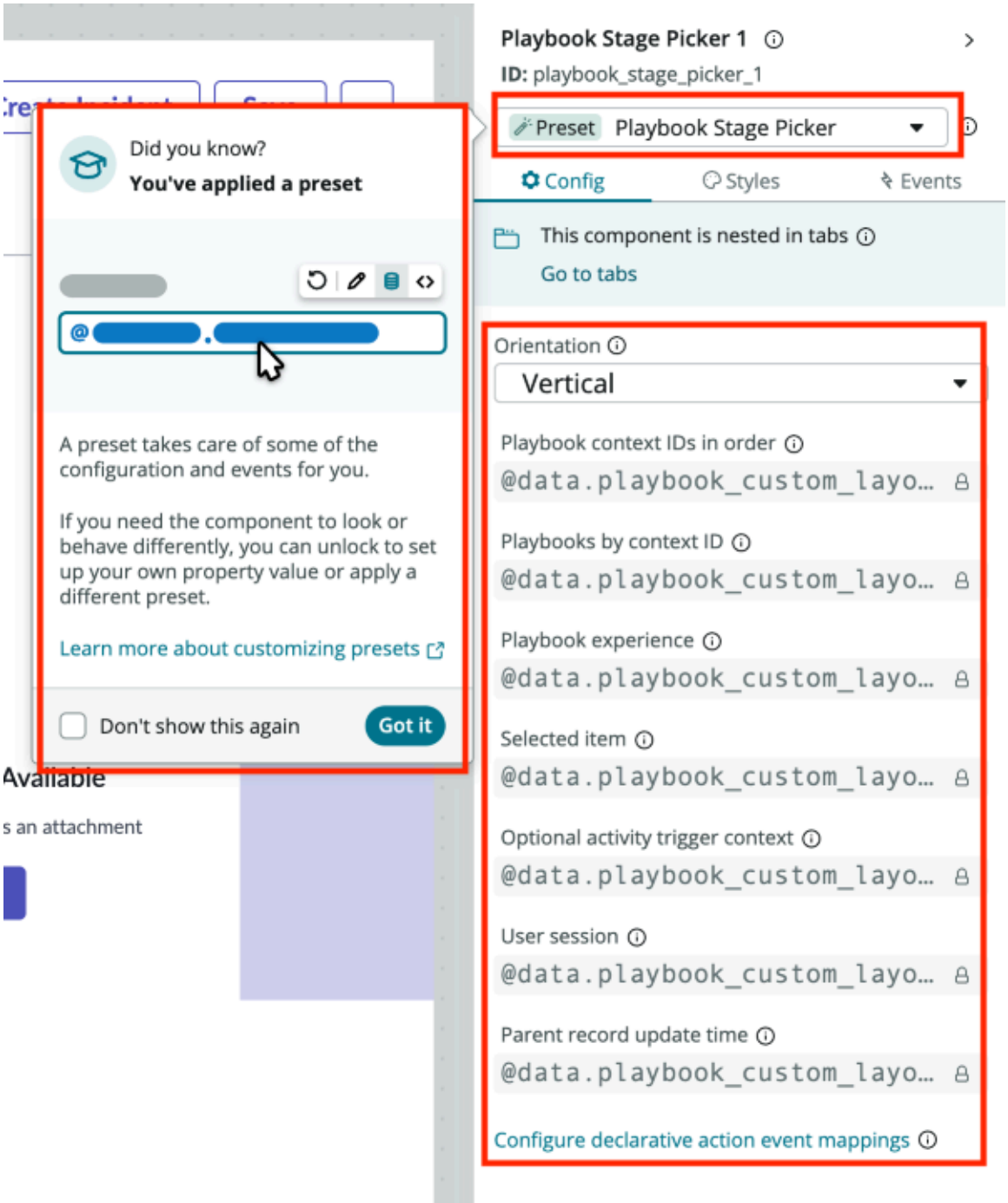
© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

k. Select the preset for this component from the Playbook Custom Layout UI Controller, and click **Save** in the upper right corner.



A confirmation message is displayed, and the component inputs and events under the **Events** tab in the stage picker panel is auto-populated.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



l. To add the **Playbook Activity Viewer**, find your **Resizable panes**component in the component tree, and select **+ Add component** under **right**.

m. Repeat steps 7j and 7k.

n. To add the **Playbook Modals**, find the tab you created under the **Main Tab** in the component tree, and select **+ Add component**.

o. Repeat steps 7j and 7k for the **Playbook Modals**.

p. Navigate back to the **Playbook Stage Picker**, and determine the orientation of your stage picker.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

q. In the upper right corner, click **Open** to preview the playbook layout.

r. Return to UI Builder.

s. Navigate back to your stage picker in the component tree, and determine the orientation of your stage picker in the panel that opens on the right.

Related topics

UI Builder

Add a custom layout bundle to a UI Builder page

Add playbook custom layout bundles to a new or existing UI Builder page that you've created from scratch.

Before you begin

Role required: admin, ui_builder_admin

About this task

Templates are page level, they are meant to be used when you create a completely new page. Bundles are like templates that you can add to a new or an existing page.

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder** and select **Playbook Experience Builder**.
   The **Playbook Experience Builder** experience was built for you to customize Playbook Experience. For more information on how to create an experience, see Configure how users interact with your applications in UI Builder.
2. Select **+** next to **Pages and variants** to create a new page.
3. Select **Create a new page**.

   The **Select a template** screen displays.
4. Select **Create from scratch instead** button at the top right.
5. Set up the page details.

Name	The name of your page.
URL Path	The URL path that users navigate to, to access the page.

6. Select **Continue**.
7. Add the test URL parameters for your page.

   Note: All playbooks require at least a table and sysId to be hardcoded on the controller or provided through a URL.

table	Name of the parent table for the playbook.
sysID	Sys_id of the record. For a record that doesn't exist, the value is **-1**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

8. Setup your default page variant.

Name	The name of your page variant.
Audiences	The users that can see your page variant. They can be defined by: ○ Role ○ Group ○ User ○ Company ○ Department ○ Location ○ Script
Conditions	Conditions that determine when the page variant is shown.

The page and default variant are created.

9. Open your new page variant.
10. In the component tree, select **+ Add component** under **Body**.
The toolbox opens.
11. Enter "bundle" in the search bar of the toolbox.
Available bundles are displayed.
12. Select the bundle you want to add to your page.

Result
You've added a bundle and all its components, presets, and controller to your new UI Builder page.

What to do next
Edit test values and controller inputs.

Add a custom layout bundle to a UI Builder standard record page

Add playbook custom layout bundles to a new or an existing UI Builder standard record page.

Before you begin
Role required: admin, ui_builder_admin

Procedure

1. Navigate to **All** > **Now Experience Framework** > **UI Builder**.
2. In the upper right, select **+Create** to create a new experience.
3. Fill in the fields for your experience.

Option	Description
Name	The name is used for tracking the experience internally. The experience name is also visi ble to users from the browser tab.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Option	Description
URL path	The URL path is the prefix that people will use to reach your experience. It matches your ex perience name by default. You can edit this path now or later in UI Builder. Supported characters include digits (0-9), let ters (A-Z, a-z), and the following symbols: $-_! *(), The path can't end with a forward slash (/).
App shell UI	Choose the **UXR Base Experience Shell**. The app shell is the wrapper of the page con tents, which is similar to the functionality of a web page. The app shell can show things like the logo of your company, user preferences, and the search icon. To learn more about the app shell options, see Define UI experiences
Landing path	The landing path is the prefix that people will use to reach your experience homepage. It matches your experience name by default. To designate a page as the homepage, you will need to create a page that has a matching path.
Roles	Only users with these assigned roles can ac cess the experience. If you leave this field empty, the experience is open to all logged-in users by default.

4. Select **Create**.
5. In your new UI Builder experience, select **Create new page**.

   The **Select a template** screen displays.
6. Choose the **Standard record** template and select **Use template**.
7. Set up the page details.

Name	The name of your page.
URL Path	The URL path that users navigate to, to access the page.

8. Select **Continue**.
9. Add the test URL parameters for your page.

   Note: All playbooks require at least a table and sysId to be hardcoded on the controller or provided through a URL.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Required parameters

table	Name of the parent table for the playbook.
sysID	Sys_id of the record. For a record that doesn't exist, the value is **-1**.

Optional parameters

query	Encoded Query string to optionally override the query provided for a record generator.
extraParams	Pass additional parameters to a page.
views	View mode used to render Playbook activities in stacked or focused mode.
selectedTabIndex	The tab that your page opens to by default.

10. Setup your default page variant.

Name	The name of your page variant.
Audiences	The users that can see your page variant. They can be defined by: ○ Role ○ Group ○ User ○ Company ○ Department ○ Location ○ Script
Conditions	Conditions that determine when the page variant is shown.

The page and default variant are created.

11. In the success message, select **Open in editor** to open your new page in the UIB editor.
12. In the component tree, select the **Main Tab**.
The **Main Tab** panel opens on the right.
13. Under the **Tabs** section in the **Config** tab, select **+ Add**.
A modal asking "How do you want to build this tab?" displays.
14. Select **Start from an empty container** and click **Next**.
A **Tab Settings** modal displays.
15. Give your tab a name and an icon, and click **Create**.
The tab is added to the component tree and a blank canvas displays.
16. In the component tree, under your new tab, select **+ Add component**.
The toolbox opens.
17. Enter "bundle" in the search bar of the toolbox.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Available bundles are displayed.

18. Select the bundle you want to add to your page.

Result

You've added a bundle and all its components, presets, and controller to your new UI Builder standard record page.

Trouble?

If the width of the bundle container is set to the min-width of the component, set the **min-width** of the container to **100%**.

What to do next

Edit test values and controller inputs.

Enable Guided Activity View

Guide end users through a playbook, step-by-step.

Before you begin

- Role required: admin or playbook.admin
- Familiarize yourself with how to begin customizing the playbook experience in UI Builder. To learn more, see Customizing the Playbook Experience.

About this task

Guide end users through a playbook, one activity at a time. If you have a lot of end users encountering issues in a particular area, and you want to walk them through a series of questions that lead to a particular Instruction activity to complete work (or even KB activity for final instruction), consider using the **Guided** activity view. There are out-of-the-box playbooks that use the **Guided** activity view for employee self-service requests, such as time off or benefit requests, available through the Employee Center.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Note:

The following configurations and features are not supported for the **Guided** activity view:

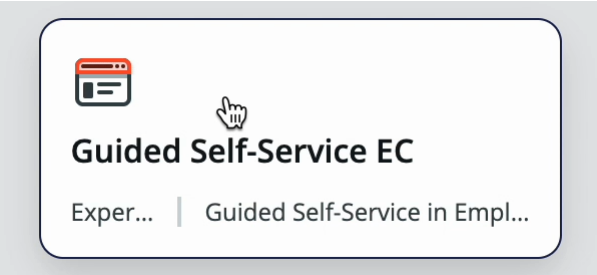
- Parallel activities
- Optional activities
- The **Pending Item Visibility** configuration in the **Guided Self-Service Experience** playbook experience record in the **Playbook Experiences** list [sys_playbook_experience.list]

  Note: This property is not relevant since there are no pending activities other than the current activity that an end user is in during a **Guided** self-service playbook run.

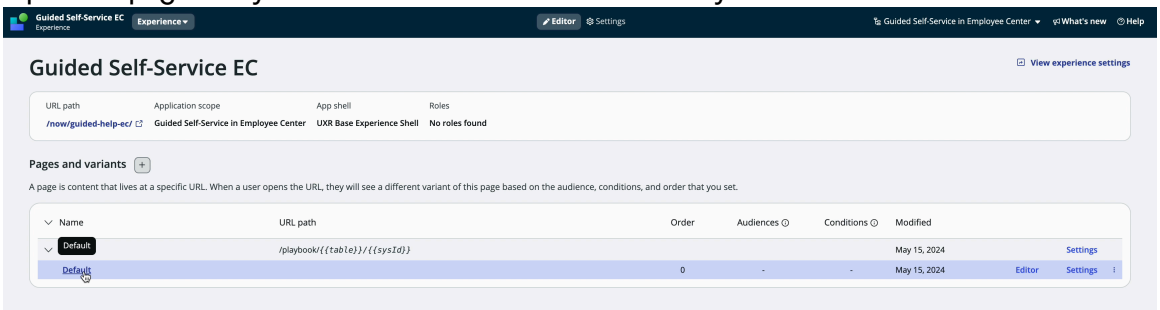
- Stage picker components, including filters

Procedure

1. Navigate to **All** > **UI Builder**, and open the **Guided Self-Service in Employee Center** experience.

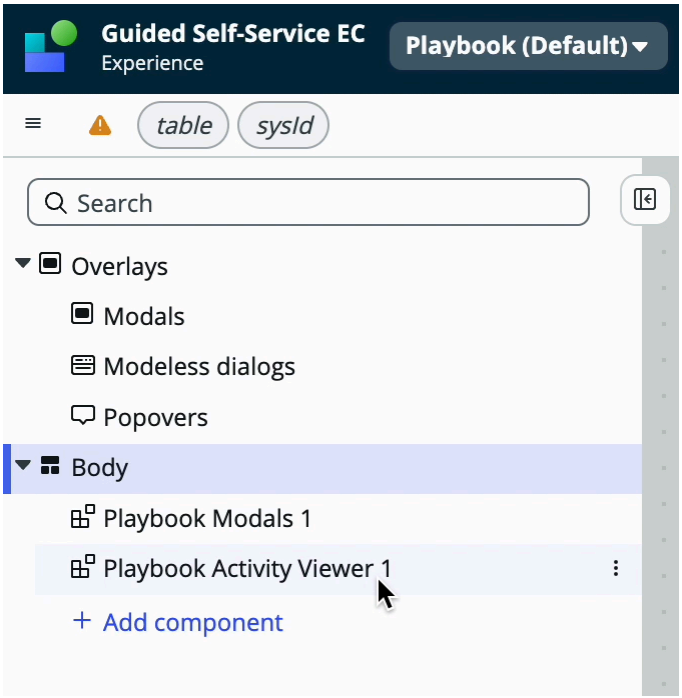


2. Open the page that you want to enable the Guided activity view for.



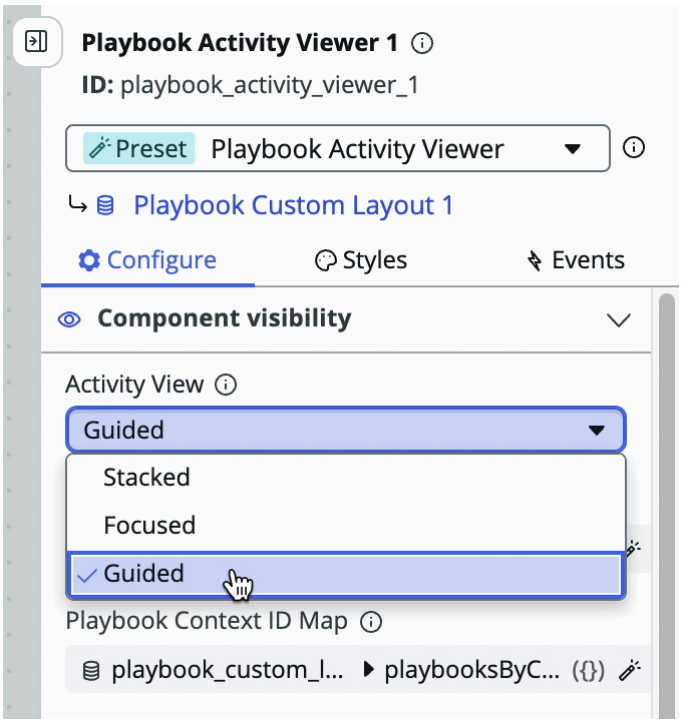
3. Under **Body** in the component tree, open **Playbook Activity Viewer**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



The **Playbook Activity Viewer** panel opens on the right.

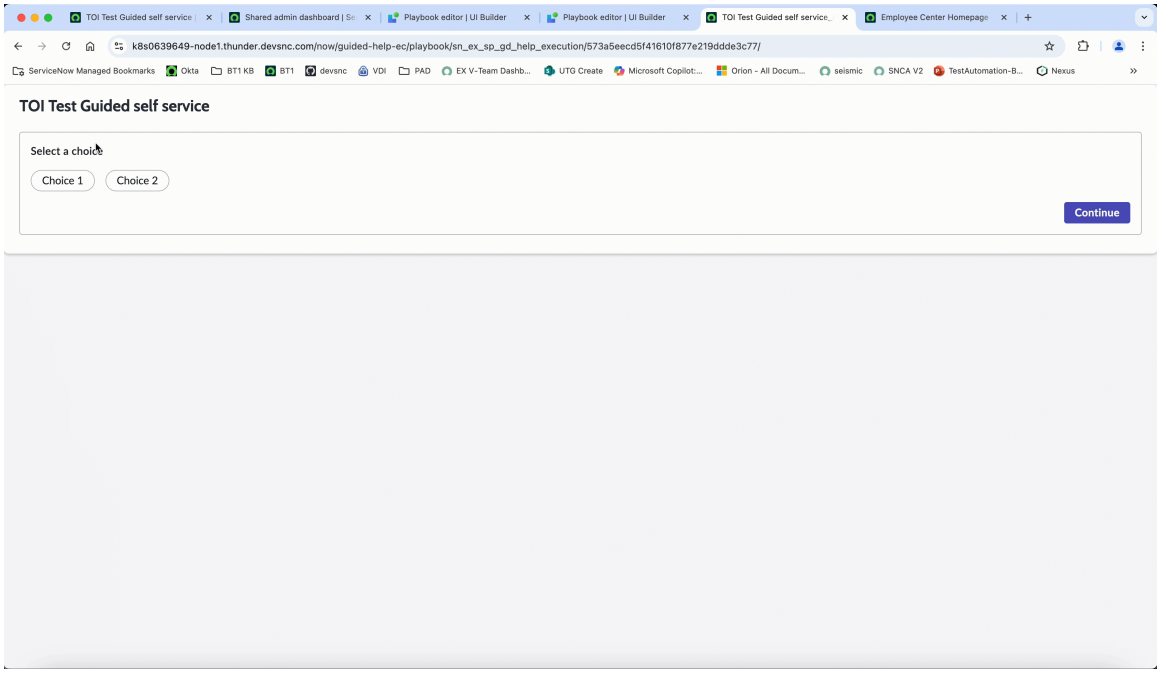
4. In the **Playbook Activity Viewer** panel, under the **Configure** tab, open the **Activity View** drop-down and select **Guided**.



Result

For an end user who is running a playbook, the result is a playbook that runs one activity at a time. If configured, users can still restart the playbook and activities.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

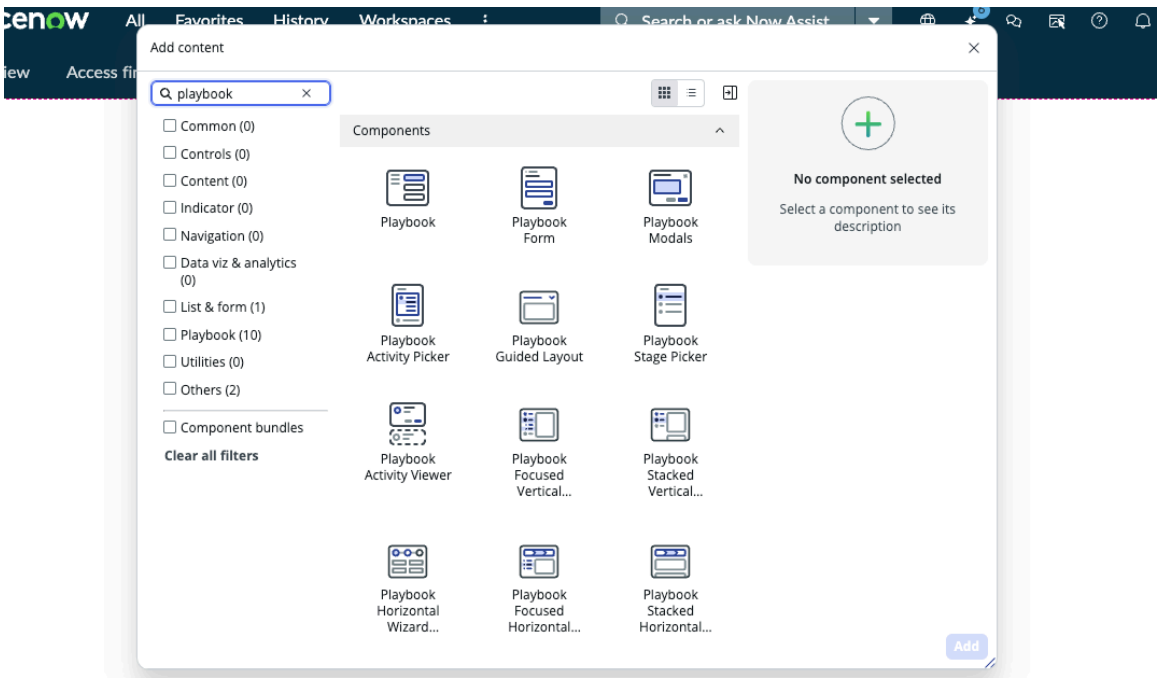


Playbook layout bundles

Playbook layout bundles are pre-wired component sets in UI Builder that determine how a playbook renders for end users at runtime. Each bundle packages a controller, supporting components, and styling so that authors can drop a complete playbook experience onto a page without configuring each component individually.

Choose a bundle based on how you want end users to move through the playbook. Some bundles let users navigate freely between activities and stages. Others restrict navigation to a sequential flow, which is useful when the playbook depends on decisions that should be answered in a specific order.

You add bundles to a page from the Content panel, then select **Components** and filter by **Playbook**. Select the bundle you want and drop it onto the page. The bundle auto-wires its controller and components.



© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbook

The core bundle for displaying a playbook. Other bundles build on this foundation.

Playbook Form

Renders the form controls for a playbook activity. Used when an activity requires user input or data entry.

Playbook Modals

Provides modal dialogs for playbook interactions, such as confirmations, errors, or supplementary forms.

Playbook Activity Picker

Displays a list or menu of activities that end users can select to navigate to a specific activity within a stage. Typically appears as a left-side panel in layouts that use non-sequential navigation.

Playbook Guided Layout

Renders the playbook as a guided experience, removing the activity picker and stage picker so end users progress sequentially through the decisions and activities. Previous responses are consolidated into an accordion below the active activity. Use for Guided Decision Playbooks. There is no matching page template. You add the bundle to a page you create from scratch or from the Standard record template.

Playbook Stage Picker

Displays the stages of a playbook so end users can navigate between them. Typically appears as a top bar in multi-stage playbooks.

Playbook Activity Viewer

Renders the content of the active playbook activity. Used in layouts where the activity content needs to be displayed independently of pickers or navigation controls.

Playbook Focused Vertical

Displays one activity at a time in a vertical layout, with full focus on the current step. Use for multi-stage playbooks where end users should concentrate on one activity before moving to the next. Has a matching page template.

Playbook Stacked Vertical

Displays multiple activities stacked vertically, allowing end users to see and interact with several activities on the same page. Use when context across activities is helpful. Has a matching page template.

Playbook Horizontal Wizard

Renders the playbook as a wizard with discrete numbered steps along the top of the page. Use for linear playbooks where each step builds on the previous one. There is no matching page template. You add the bundle to a page you create from scratch or from the Standard record template.

Playbook Focused Horizontal

Displays one activity at a time in a vertical layout, with full focus on the current step. Use for multi-stage playbooks where end users should concentrate on one activity before moving to the next. Has a matching page template.

Playbook Stacked Horizontal

Displays multiple activities in a horizontal arrangement (alternative to Stacked Vertical). Use for layouts where horizontal flow fits the workspace or screen better than a vertical stack. Has a matching page template.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Playbooks in Service Portal

Use playbooks to guide Service Portal users through your business processes.

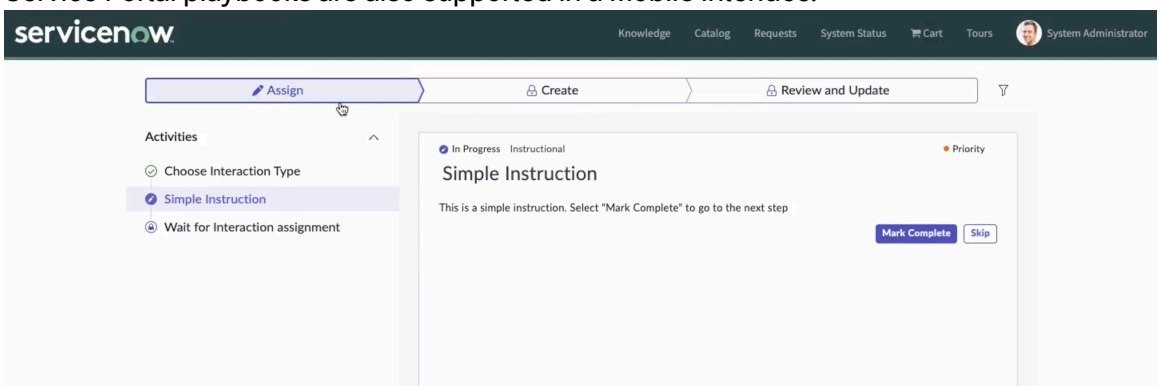
Using the widget

The Portal Playbook widget adds playbooks that your Service Portal users can run.

Provide a playbook experience to your Service Portal users for a consumer grade user experience. Requests on portals are surfaced as catalog items, including any playbooks you make available in Service Portal. Embedding a playbook in Service Portal enables:

- A rich user interface for activities during a business process
- Guidance for long business processes
- Going back and editing any previous steps of a business process
- Saving long running playbooks for a business process and resuming at a later point
- Seamless transition for agents and teams to enter a business process
- Visibility into where you are in a business process
- Visibility on a specific user's tasks
- Single admin experience for a whole business process.

Service Portal playbooks are also supported in a mobile interface.



Use cases

Business account onboarding

Onboarding a new or existing business customer with one or more contacts along with onboarding the services requested such as wire transfers, treasury services. Promote compliance and deliver a faster time to value.

Loan or mortgage application

Intake of a new credit card application or loan application for both consumers and corporate programs. Customer needs the ability to save the application and come back at a loter time to resume application.

Insurance claims

Policy holder submitting a new personal auto or home claim for an auto accident or home damage via portal.

Request quote for a new policy

Business customer requesting a quote for small business insurance policy that includes liability and commercial property insurance The customer can start filling

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

in the request and the agent needs the abilith to fill in the remaining on behalf of the customer.

License request

Constituents requesting a new license such as a business license, or personal license (fishing, driving or hunting) from a government agency via a government portal. These applications typically vary by service and state and constituents need to be guided through request.

Customer cases

Cases logged by users who need guidance to select the correct issue and enter all the necessary details, such as instances, steps to reproduce, best time to contact, etc. Enable faster case resolution.

Life cycle

The general life cycle of a Service Portal playbook can be summarized as:

- A business process administrator builds the playbook in Workflow Studio. To learn more about building a playbook in Workflow Studio, see Building Playbooks.
- An administrator adds the playbook to a Service Portal page and customizes the playbook runtime experience at the same time through the ServiceNow AI Platform®. To learn more about embedding a playbook in Service Portal and further customizations in the ServiceNow AI Platform®, see Configure a playbook for Service Portal.
- Service Portal administrators and developers customize the playbook portal page. To learn more about using the Service Portal Designer to customize the playbook portal page, see Customize a playbook in Service Portal.
- Service Portal end users, also called requesters, launch and run through the playbook. To learn more about launching and running a playbook in Service Portal, see Run a playbook in Service Portal.

Set up mappings between themes

Make sure that playbooks run as expected in your Service Portal by setting up mappings between your Service Portal theme and the UXF theme used in UI Builder.

Before you begin

Role required: admin, or portal admin with either snc_internal or snc_external

About this task

The Portal Playbook widget uses a system property **ux_portal_theme_to_uib_theme_mapping** to handle mappings between a Portal page theme and a UXF theme.

Procedure

1. Navigate to **All** > **System Properties** > **All Properties**.
2. Select **New** in the upper right corner.
3. Enter values for the following fields.

Field	Description
Name	Specify your Service Portal property in the name. Give your system property the name **ux_portal_theme_to_uib_theme_mapping.[the sys ID of your service portal theme]**. For example, if you use the La Jol la theme for your Service Portal, it has a sys

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	ID of a7a6e78277002300a6e592718a10617a . You would enter **ux_portal_ theme_to_uib_theme_map ping.a7a6e78277002300a6e592718a10617a** as the name.
Value	To specify the sys UX theme and sys UX style that you want to map the Service Por tal theme to, enter a comma-separated string of **[the sys ID for the sys UX theme], [the sys ID of the sys UX style]**. For exam ple, if you want to map your Service Por tal theme to the Polaris UX theme in dark mode, the sysId for the Polaris UX theme is 31bf91ae07203010e03948f78ad30095, and sys ID for the Dark sys UX style is e09ef7ae07103010e03948f78ad3002c. You would enter **31bf91ae07203010e03948f78ad30095, e09ef7ae07103010e03948f78ad3002c** as the value. **Note:** The second value in this string is always an optional sys_ux_style. The first value is always the sys_ux_theme.

4. In the form context menu, select **Save**.

Result

The mapping between your Service Portal theme and the UXF theme is saved. Launch the playbook in Service Portal to see your changes.

Note: To turn a mapping off, you must delete it.

What to do next

Embed a playbook in a Service Portal page and customize the Service Portal playbook runtime experience in the ServiceNow AI Platform®.

To learn more about customizing the playbook runtime experience in Service Portal, see Configure a playbook for Service Portal.

Configure a playbook for Service Portal

Add a playbook that Service Portal users can launch and run by creating a Playbook Content Item.

Before you begin

- Role required: admin, or portal admin
- If you don't have a playbook that you want to customize for Service Portal yet, build one in Workflow Studio. To learn more about building a playbook in Workflow Studio, see Building Playbooks.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

- Create a record generator, if there isn't already one you want to use. To learn more about creating a playbook record generator, see Playbook record generator.
- You may need to set up mappings between your Portal theme and the UXF theme, if they are very different. To set up mappings between your Portal theme and the UXF theme, see Set up mappings between themes.

About this task

In a Playbook content item, the admin specifies the URL that points to the portal page.

Procedure

Navigate to **All** > **Playbook Experience** > **Playbook Content Items**.

Playbook content item form view

Field	Description
Name	Enter a name for the playbook.
Active	Uncheck this box if you don't want users to be able to run the playbook in Service Portal.
Catalogs	Enter the catalog that you want this playbook to be added to. There is no default, but the playbook is not searchable if you don't add it to a catalog.
Category	Enter the catalog category that you want this playbook to be in. There is no default, but the playbook is not searchable if you don't pick a category for the playbook.
Icon	Upload a small image that appears next to the name when the item is displayed in the service catalog. Supported file types are jpg, png, bmp, gif, and jpeg.
Application	Choose an application scope that you want your Service Portal playbook to run in. Selecting **Global** lets your playbook run in any application scope. For more information, see Application scope.
Picture	Upload an image showing the item. Supported file types are jpg, png, bmp, gif, and jpeg.
Short description	Enter some descriptive details about your playbook.
Table	Enter the parent table that the playbook opens on. If not specified, defaults to the Incident table.
Record ID	Enter the parent Sys ID of the record you want to open in the record generator table. If you want to use the record generator, leave it as -1. If not specified, defaults to -1.
Playbook Experience	Choose the playbook experience record with the playbook configurations that you want

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	for your Service Portal users. If not specified, defaults to the Global Playbook Experience.
Playbook Experience Record Generator	Choose the record generator with the playbook that you want to show.
Portal Page	Enter a Service Portal page that you want to open the playbook in. If not specified, the playbook is launched in the out-of-the-box Playbook Portal page.
Title	Add a title for any components that use the title property in the Portal Playbook widget's UI Builder page.
Meta	Add tags to the playbook item for Service Portal home screen searches.

Trouble?

For issues that seem like process execution related, check the execution logs on the sys_pd_context that is related to the process that was run. You can find these in the "today's executions" module within the navigator.

For issues that are flow designer related, debug using the flow debugger options. To learn more about flow debugger options, see [an article linked to debugging flows].

For other issues:

- Check the instance logs around the execution time of the sys_pd_context records and see if you can find any errors that seem related (record watchers, flow exceptions, or any other exceptions seeming relevant).
- Make sure versions of playbook are as follows:
  - now-playbook-experience version 25.1.4 or greater
  - playbook-experience version 25.1.2 or greater
- Verify that you are using the out-of-the-box Portal Playbook widget.

What to do next

Customize the runtime playbook experience in the Service Portal Designer.

Portal Playbook Widget

Explore the Portal Playbook Widget.

About the widget

The Playbook widget is an iFrame that enables administrators to specify where a playbook event should be directed. The iFrame URL is the UI Builder Playbooks Portal page. The widget handles events that playbook is listening for via the Session Storage API so that it knows when to perform an action in portal, like opening a record or list in a modal within Service Portal.

The out-of-the-box components are built for any Playbook Experience you may need for your Service Portal users. We do not recommend directly editing the out-of-the-box UI Builder Playbook Portal Page, the Service Portal Playbook widget, or the Playbook Content Item. Changing the out-of-the-box components can result in technical problems.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

If, for example, you need a UXF Client Action to work for your instance of the playbook page, we recommend cloning the playbook widget instead.

Note: To learn more about how to clone or create your own widget instead, see Developing custom widgets.

Cloning a Playbook Service Portal Widget

Navigate to **All** > **Service Portal** > **Widgets** and find the **Playbook** widget.

Note: If you clone the **Playbook** widget, make sure that all out-of-the-box actions and configuration properties are copied over to your cloned widget.

Form Fields

Field	Description
Name	Enter a name for the cloned widget.
ID	The widget ID is created automatically based on the widget name by default, but you can change it to whatever you want.
Description	Add an optional description that provides details for the widget does.
Application	Choose an application scope that you want your widget to run in. Selecting **Global** lets your playbook run in any application scope. For more information, see Application scope.
Public	Select if your widget is public. If unchecked, your widget is private and only authenticated users with the snc_internal or snc_external role can see the widget.
Roles	Restrict access to the widget to certain roles.
Body HTML template	Leverage the Angular JS two-way binding to bind your controller variables to your markup. **Danger:** Only make changes to HTML templates if you have advanced coding knowledge and a firm understanding of AngularJS and the platform API. The iFrame URL is the URL of the UI Builder page. To learn more about the HTML template field, see Developing custom widgets. **Warning:** Make sure the iFrame URL of your cloned widget is different from the iFrame URL for the out-of-the-box widget.
CSS	Configure the widget CSS. Configuring CSS in an actual widget affects all instances of that widget. To learn more about the CSS field, see Developing custom widgets.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Form Fields (continued)

Field	Description
Server script	Script the server-side logic. This is helpful primarily with interacting with the Glide platform through server-side APIs. **Danger:** A server script requires knowledge of the ServiceNow API to work with record data. To learn more about the Server script field, see Developing custom widgets.
Client controller	In Angular, HTML templates contain Angular-specific elements and attributes. Angular combines the template with information from the model and client controller to render the dynamic view that a user sees in the browser. Identifier name for a reference to the controller in the directive's scope **Danger:** A client script requires knowledge of both the ServiceNow API and AngularJS to create a client controller.
controllerAs	The HTML template uses the controllerAs syntax for basic binding.
Link	Use a link function to directly manipulate the DOM. **Danger:** The link function requires knowledge of AngularJS. To learn more about the Link field, see Developing custom widgets.
Has preview	Select the option to enable a preview of the widget in the Widget Editor.
Demo data	Provide data when previewing the widget in the widget editor.
Data table	Select a table to use as a data source.
Fields	Select fields to display as instance options.
Option schema	Allows a Service Portal admin to configure a widget. To learn more about the Option schema field, Widget option schema.
Docs	Select a Service Portal documentation link.

Check for errors in the UI Builder Playbook Experience Portal page config and events properties, e.g. disable the Open Record event as a maint user.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Customize a playbook in Service Portal

Use the Service Portal Designer to customize the playbook runtime experience for Service Portal users.

Before you begin

- Role required: admin, or portal admin with either snc_internal or snc_external
- Create a record generator if you don't want to use the default record generator or any of the other existing record generators.

> **Note:** A key difference in Service Portal is that the playbook record generator is used instead of the record producer. The Service Portal requester enters the information for the record generator and uses the Next or Continue declarative action to move to the next activity.

To learn more about playbook record generators, see Playbook record generator.

Procedure

1. To edit your playbook widget in the Service Portal Designer, navigate to **All** > **Service Portal** > **Service Portal Configuration**.
2. Select **Page Editor**.
3. Search for and select your playbook.
4. Select **Edit [Playbook] (playbook) page in Designer**.
5. Select the widget, and select the edit icon.

Data parameters

Field	Description
Playbook UIB Page URL	Enter a URL for the UI Builder page. If not specified, this points to the default **Playbook Experience Portal** page.
Open Record Widget	The Sys ID for the widget to use when a user opens a record. If not specified, the form widget is used.
Open Record is Pop Up	If enabled, shows the reference picker inside the form.
Open List Widget	The Sys ID for the widget to use when a user opens a list. If not specified, the Data Table from the Instance Definition is used.
Extra Params	Pass arbitrary data from the widget to its UI Builder page.

Presentation parameters

Field	Description
Height	Enter the height of the playbook. If not specified, height is set to 850px.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Open Record Modal Title	Add a title to the modal that a user sees whenever they open a record. If not specified, there is no title.
Open Record Modal Message	Add a message to the modal that a user sees whenever they open a record. If not specified, there is no message.
Open Record Modal Buttons	Add the buttons to the modal that a user sees whenever they open a record. If not specified, there are no buttons. Enter in JSON format.
Open Record Modal View	The form view that you want to show for the open record.
Open Record Modal Size	Choose the size of the modal that a user sees whenever they open a record. Choice are: ○ sm - small ○ md - medium ○ lg - large If not specified, defaults to large.
Open List Modal Title	Add a title to the modal that a user sees whenever they open a list. If not specified, there is no title.
Open List Modal Message	Add a message to the modal that a user sees whenever they open a list. If not specified, there is no message.
Open List Modal Buttons	Add the buttons to the modal that a user sees whenever they open a list. If not specified, there are no buttons. Enter in JSON format.
Open List Modal View	The form view that you want to show for the open list.
Open List Modal Size	Choose the size of the modal that a user sees whenever they open a list. Choice are: ○ sm - small ○ md - medium ○ lg - large If not specified, defaults to large.
Activity View	Change the activity view between stacked or focused.
Playbook Experience ID	Enter the playbook experience record ID with the playbook configurations that you want for your Service Portal users. When nothing is set in the URL during the playbook run, this is the default playbook experience. If nothing is specified here, defaults to the Global Playbook Experience.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Open Record Modal Prevent URL Update on Submit	Prevents the URL of a running playbook in Service Portal from updating whenever a new record is submitted from a form in a record modal.

Trouble?

Verify that you are using the official Playbook Widget for the Portal Page.

Run a playbook in Service Portal

Launch a playbook as a Service Portal requestor.

Before you begin

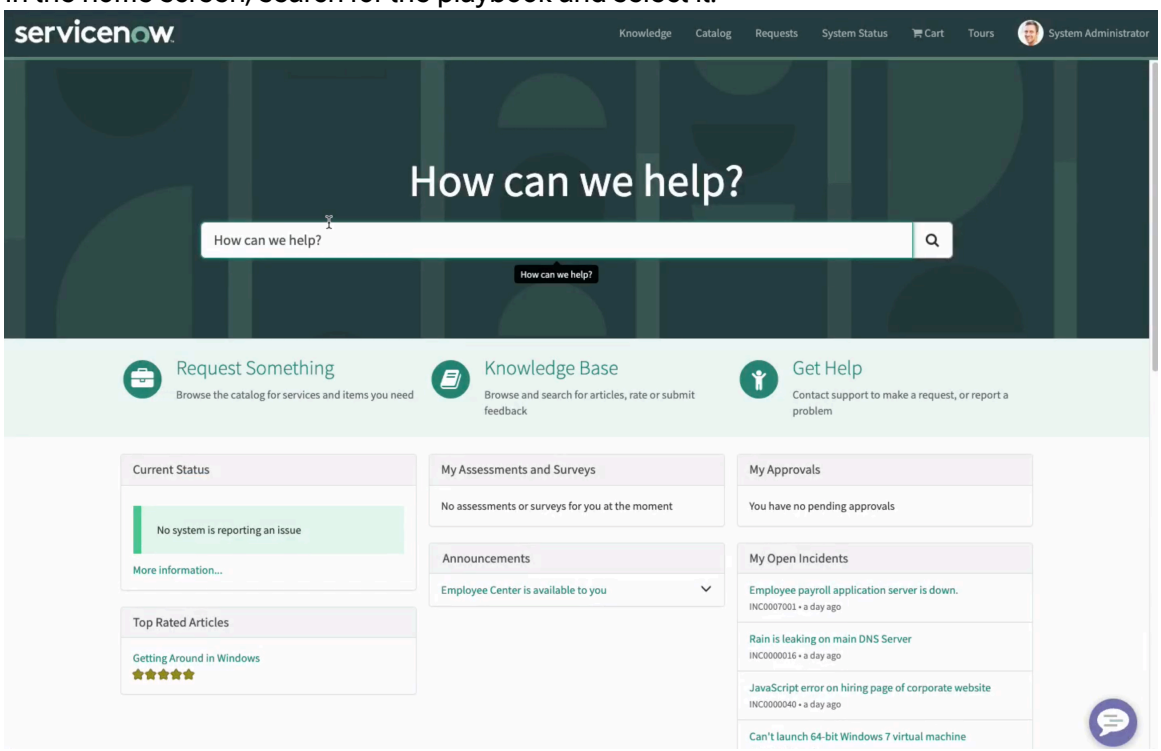
Role required: snc_internal or snc_external

About this task

Keep track of where you're at in an overall process more easily, and pause and resume the playbook as needed.

Procedure

1. Navigate to your Service Portal instance.
2. In the home screen, search for the playbook and select it.



The playbook launches.

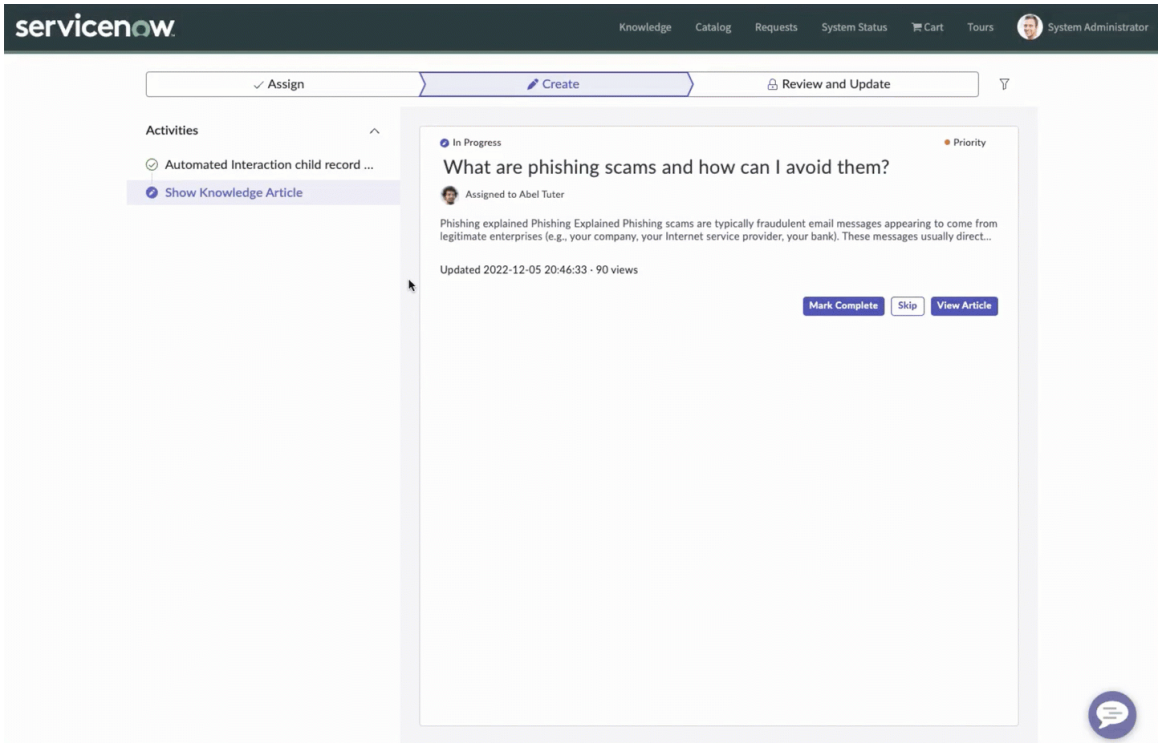
3. **Optional:**
   In the URL, you can apply the following properties to your playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Property	Description	Example
layoutType	Set the playbook to a custom layout. If not specified, defaults to the default (standalone) layout.	layoutType=custom
table	Enter the parent table that the playbook opens on. If not specified, defaults to the Incident table.	table=incident
sys_id	Enter the parent Sys ID of the record you want to open in the record generator table. If you want to use the record generator, leave it as -1. If you leave it as -1, the value changes once the record is generated.	sys_id=-1
playbookExperienceid	Enter the playbook experience record ID with the playbook configurations that you want for your Service Portal users. If not specified, defaults to the Global Playbook Experience, which has a record ID of 9809a560f2200102920c912d4767e1a.	playbookExperienceid=9809a560f220010292

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

4. As you go through the playbook, you can open records and lists in a modal without needing to leave Service Portal, such as when you view a Knowledge Base article or a user record via the information icon.



Trouble?

Errors

Error	Description
404: The page you are looking for could not be found	The table or sysId is missing from the URL or the URL is incorrect.
Configuration Error	The process cannot be found by the playbook. For example the table is interaction, but the Sys ID does not exists for this table.
There are not playbooks available	There is a valid record for the table, but the record does not satisfy the conditions to show the playbook. For example an interaction record might need to be of type Chat and start with the short description of PLAYBOOK: to kick off a playbook.
No Activities Available	Here are not activities to view for this particular stage of playbook. Activities can be hidden based on user role or Run Conditions from the process.
No filtered results	When using the playbook filter, no results can be shown for a particular stage.

For client-side issues, check local browser console.logs which might show a runtime issue using the browser's inspector.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Configure a playbook for ServiceNow® mobile

Configuring a playbook for ServiceNow® mobile is exactly the same as in a configurable workspace, but with an additional step for embedding the playbook.

Before you begin

Role required: admin

Procedure

1. Navigate to **All** > **Workspace Experience** > **Actions & Components** > **Related Items** or **Contextual Side Panel**.
2. Click **New**.
3. On the form, fill in the fields.

Action Assignment form

Field	Description
Action label	Label of the Related Item or Contextual Side panel tab.
Action name	Unique name for your item. This name can be overridden.
Implemented as	Select **UI Component**.
Specify UI component	UI component associated with the action. Enter `now-playbook-experience`.
Icon	Icon that is displayed in the Contextual side panel to differentiate from other components. **Note:** This field is available for the Contextual Side Panel only.
Application	Application for the action assignment.
Workspace	Option to limit a Related Item or Contextual Side Panel to a specific Workspace. For example, Agent Workspace or HR Workspace.
Table	Select the table you want to show the Related Item or Contextual Side Panel on.
View	Field to only display a Playbook when this Form View is selected on the parent record.
Active	Option to activate the action assignment.
Order	Integer that determines the precedence of this action in relation to matching actions with the same name. The lower the number, the more likely it is to be selected against other actions. The typical practice is to use numbers that are in the hundreds. For example, 100, 200, 300, or 400.
Tooltip	Message that's displayed when your mouse points to the Related Item tab or Contextual Side Panel icon.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
Description	Description for the action assignment. This description is displayed in the Action Assignment list and provides context on the form.

4. Click the **Advanced View** related link.
5. Click the **Component Attributes** tab.
6. On the form, fill in the fields.

Component Attributes form

Attribute name	Description
playbookExperienceId	Associated Playbook experience ID. Copy and paste the sys_id of a Playbook Experience record. **Note:** If no Playbook experience ID is provided, the global Playbook experience is used by default.
parentSysId	Associated parent sys_id. Enter `{{sysId}}` to automatically take the parentSysId of the record that you're viewing.
parentTable	Associated parent table. Enter `{{table}}` to automatically take the parentSysId of the record that you're viewing.
compactMode	Option to display a Playbook in compact mode. Typically set to true for Contextual Side Panel and false for Related Item.
recordGeneratorQuery	Not currently supported in Agent Workspace.
isNewParentRecord	Set to `{{isNewRecord}}`.

Note: Select a different **UI Component** if the attributes are missing from your form. Change the **UI Component** back to **now-playbook-experience** and the attributes will appear.

7. Select **Update**.
8. Click the **Conditions** tab.
9. On the form, fill in the fields.

Conditions form

Field	Description
Script Condition	Script condition for the action assignment. Enter `sn_playbook.PlaybookExperience.parentRecor` The script condition enables you to show a

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

Field	Description
	Playbook only when the record has triggered a process execution.
Client Conditions	Choose conditions to limit collisions based on your use case.
Record Conditions	Choose conditions to limit collisions based on your use case.
Required Roles	Roles to limit Playbook access.
Requires create access	Option to require create access.
Requires read access	Option to require read access.
Requires write access	Option to require write access.
Requires delete access	Option to require delete access.

10. Select **Update**.

Result
The playbook is configured for ServiceNow® mobile.

What to do next
Embed your playbook in ServiceNow® mobile. To learn more, see

Embed a playbook in ServiceNow® mobile

Embed a playbook in ServiceNow® mobile by creating a screen in Mobile App Builder.

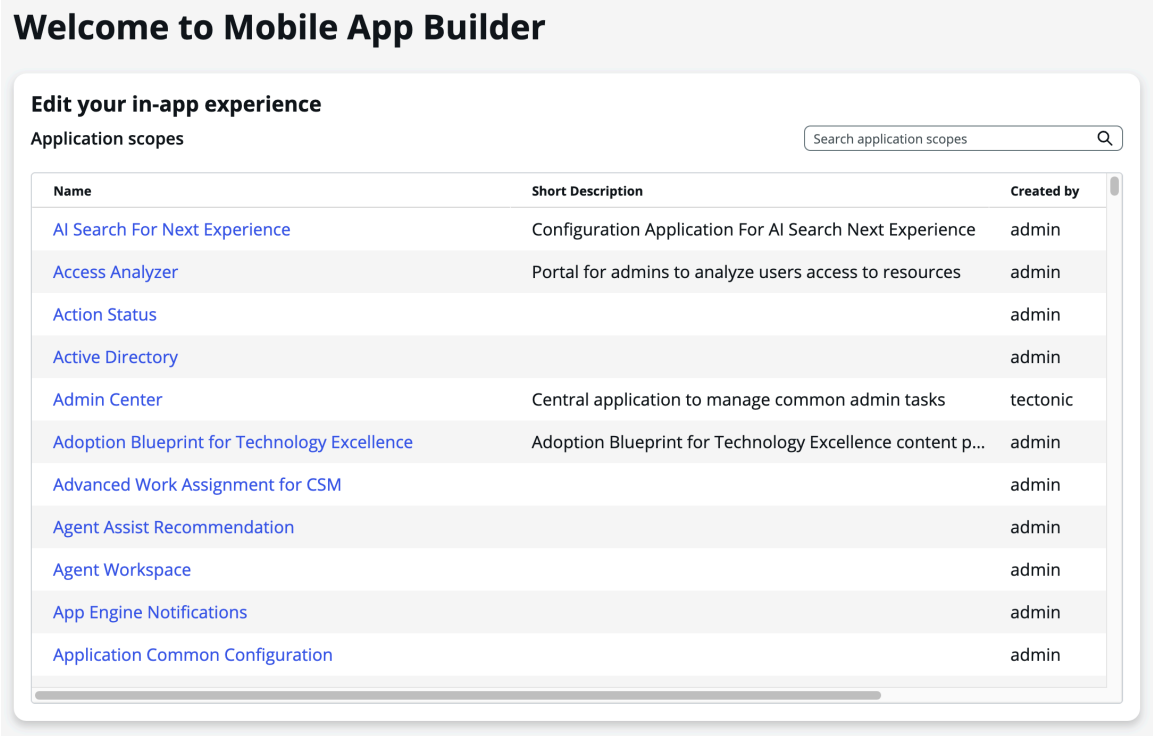
Before you begin
Role required: admin

If you haven't configured your playbook for ServiceNow® mobile in UI Builder yet, see Configure a playbook for ServiceNow mobile.

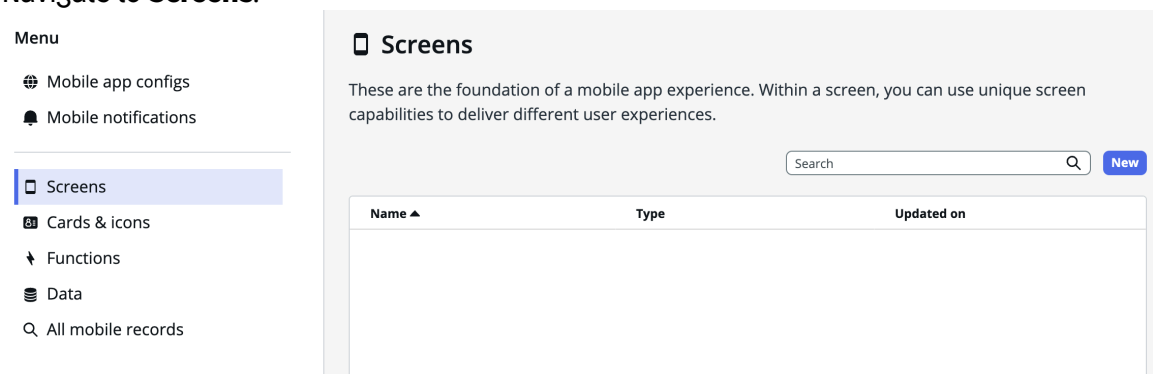
Procedure
Create a playbook screen

1. Navigate to **All** > **System Mobile** > **Mobile App Builder**.
2. Search for and select the scope of the application that you want to create a screen for.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



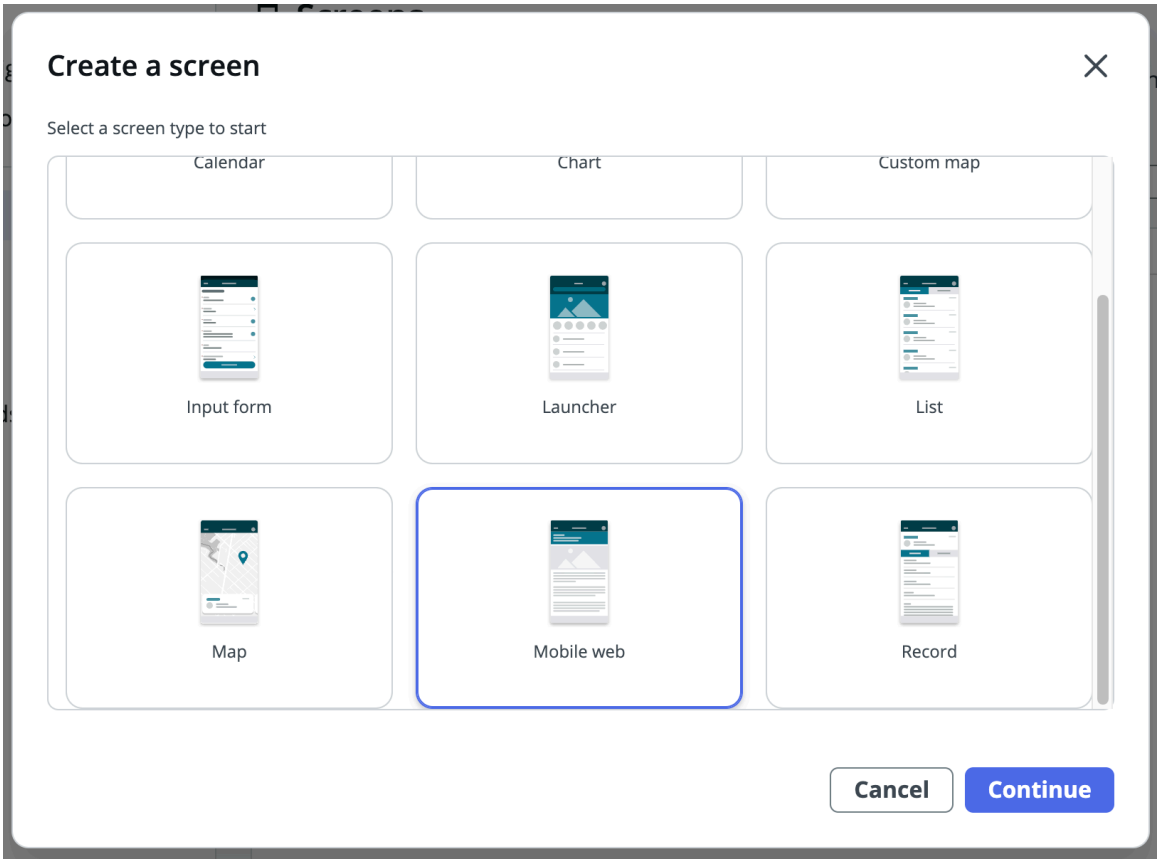
3. Navigate to **Screens**.



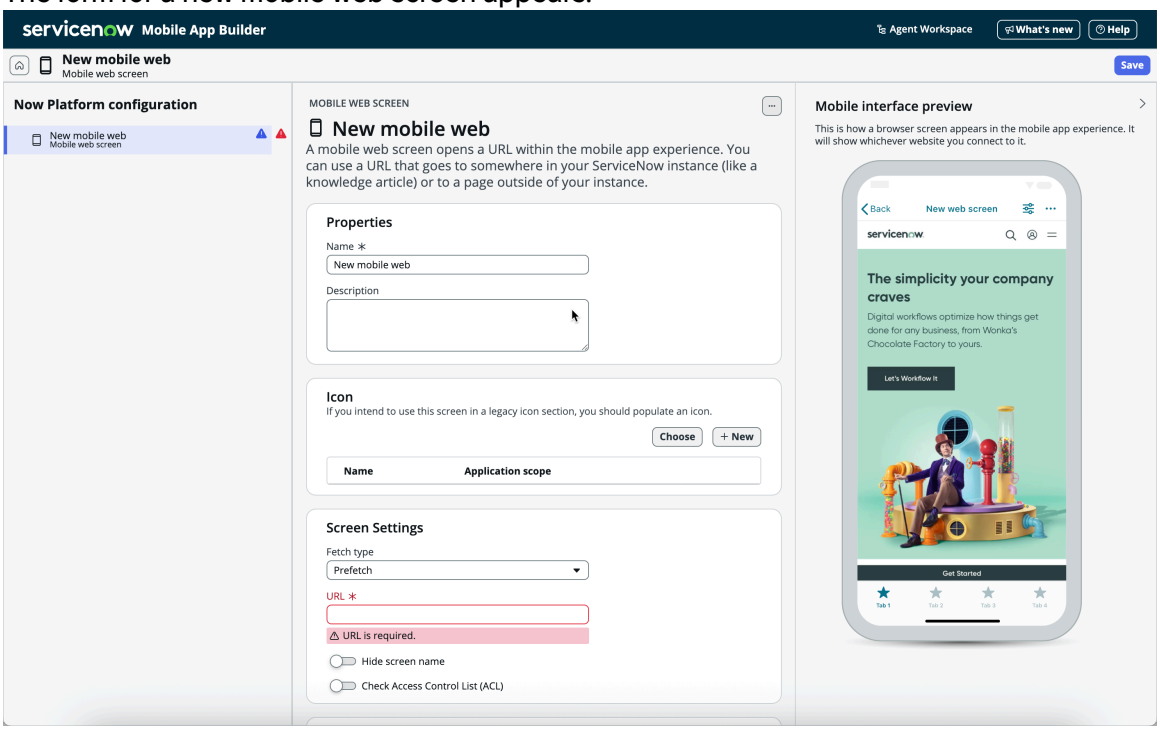
4. To create new screen, select **New**.

5. In the **Create a screen** modal, select **Mobile Web**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries.
Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.

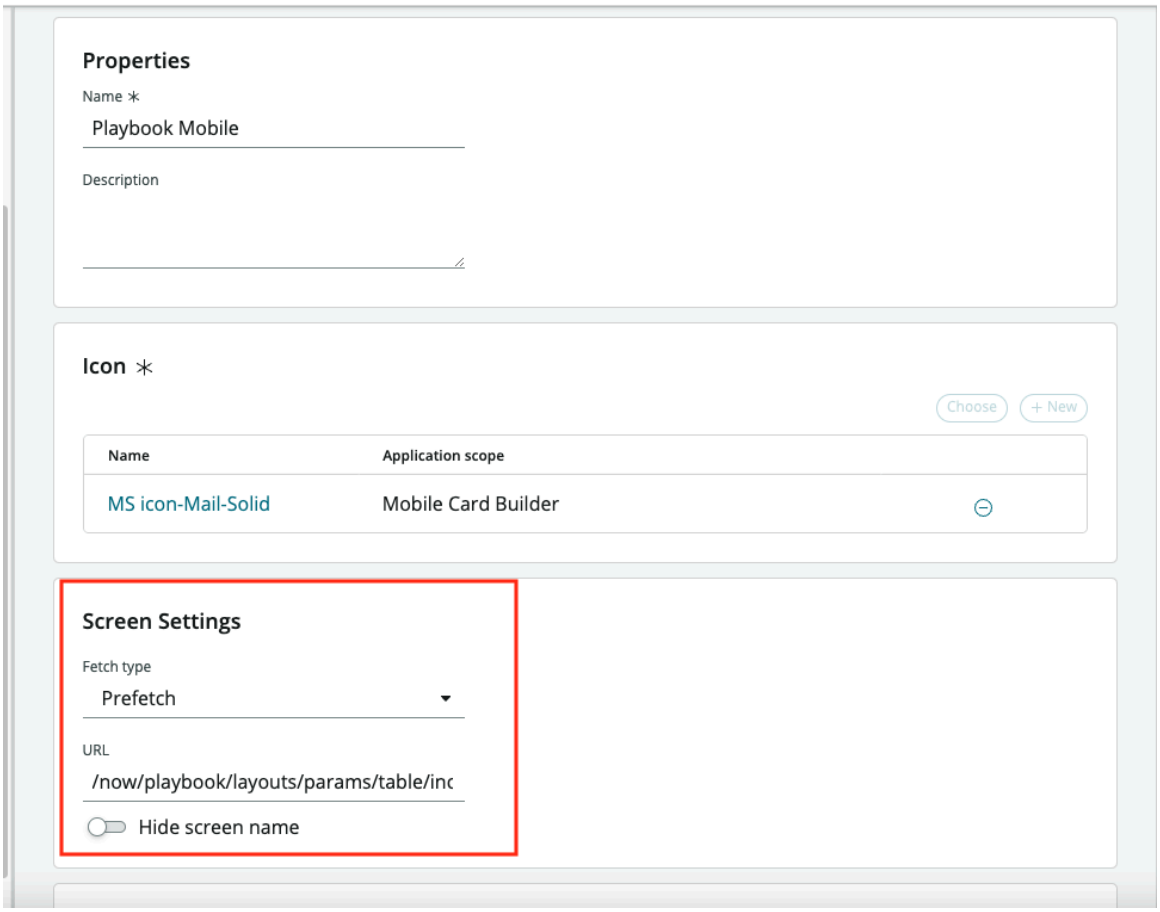


The form for a new mobile web screen appears.



6. Give your mobile web screen a name and description.
7. Choose an icon for your mobile web screen.
8. Under **Screen Settings**, enter the URL of your mobile playbook.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



Important: The **web_controller_spinner=on** parameter is important to include for proper loading behavior on mobile.

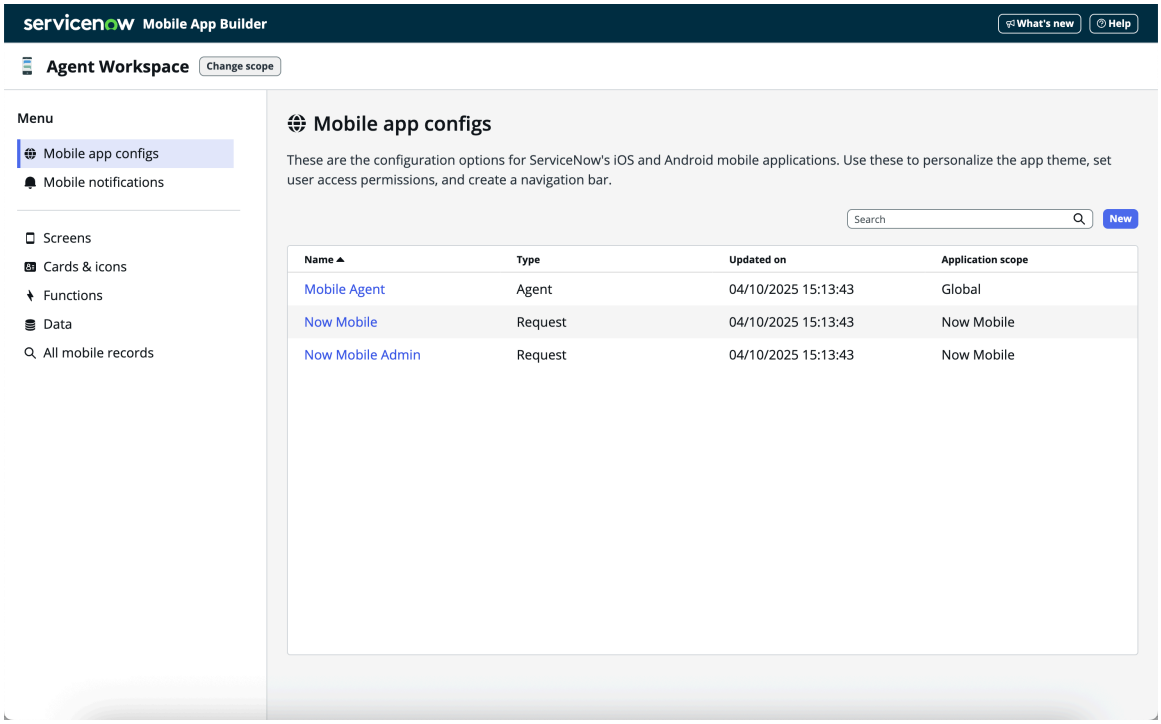
Example
/now/playbook-mobile/playbook/interaction/-1/params/view/stages?web_controller_spinner=on

9. **Optional:** If you have any roles you want to limit this screen to, or any other configurations you would like to learn more about, see Configure a mobile web screen.
10. **Save** the screen.
    Your mobile web screen is configured for your playbook.

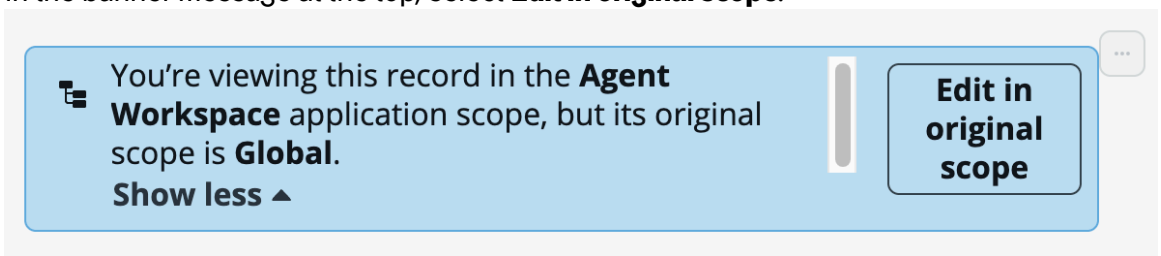
Configure the Mobile Agent

11. Navigate back to the scope level by selecting the home icon ( ).
12. Select **Mobile app configs**.

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.



13. Select **Mobile Agent**.
14. In the banner message at the top, select **Edit in original scope**.



15. In the component tree, select the **Launcher screen** component.
16.

Result
Your playbook is now embedded in ServiceNow® mobile.

Refi

© 2026 ServiceNow, Inc. All rights reserved.
ServiceNow, the ServiceNow logo, Now, and other ServiceNow marks are trademarks and/or registered trademarks of ServiceNow, Inc., in the United States and/or other countries. Other company names, product names, and logos may be trademarks of the respective companies with which they are associated.