

# 1.1 What is ServiceNow?

ServiceNow is a software Company based in Santa Clara, California, founded by Fred Luddy in 2003, to solve problems large enterprises face with traditional IT delivery by providing a robust, simple to use Cloud-based environment which business people can use to solve the problems themselves.

The company's core business revolves around management of "incident, problem, and change" IT operational events.

## Purpose of ServiceNow Platform

The Purpose of the ServiceNow Platform is to provide a cloud-based solution that enables organizations to automate and streamline their business processes, improve service delivery and enhance overall operational efficiency.

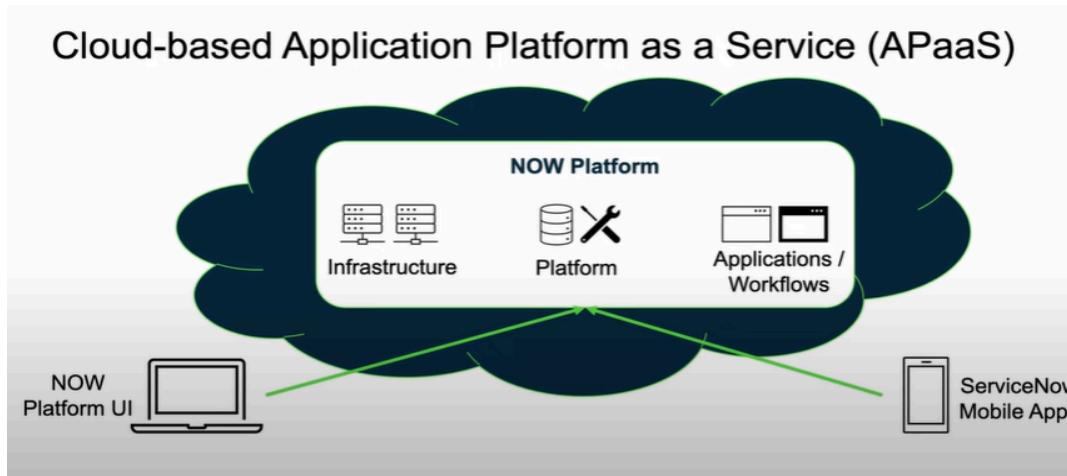
**ServiceNow Platform** is a cloud-based platform that provides digital workflow automation to manage various business processes and IT operations.

ServiceNow offers a range of applications that span IT service management (ITSM), IT operations management (ITOM), IT business management (ITBM), and many other business functions such as HR, security, and customer service.



## 1.2 ServiceNow Platform Overview

The ServiceNow Platform is an **Application Platform-as-a-Service**. This means the platform resides in the cloud. Companies no longer have to buy and manage the equipment necessary to host these applications.



- ServiceNow utilizes an **advanced, multi-instance, single-tenant architecture** as the default offering for customers, meaning an instance features an individually isolated database containing data, applications, and customizations.
- ServiceNow provides services to its users from a configurable **web-based user interface**, **built on top of a flexible database schema**.
- The Platform and the applications that run on it use a **single system of record** to consolidate an organization's business processes.
- The Platform integrates with other enterprise systems and supports a wide variety of **plug-and-play** applications.
- ServiceNow Provides a platform upon which you can build custom applications.
- All ServiceNow Data Centers are paired with another datacenter to provide redundancy. **Redundancy is built into every Layer** including devices and network resources
- **Backups & Security** - Servicenow provides 4 weekly full data backups and 6 days of daily differential backups. The entire platform is secured using third party security organization

## **ServiceNow Applications and Workflows**

A workflow is a set of activities or tasks that automate a business process. Workflows help streamline processes, enforce business rules, and reduce the need for manual intervention.

### **4 Primary Workflows of ServiceNow**



#### **IT Workflow**

Focuses on automating IT service management processes. Includes Incident, Change and Request Management.

Example: Resolving an IT incident or processing a change request.

#### **Employee Workflow**

Streamlines internal processes to enhance the employee experience. Includes HR Service Delivery, Employee Center, and Employee Onboarding.

Example: Automating new employee onboarding or handling HR requests.

#### **Customer Workflow**

Enhances customer service and support functions. Includes Case Management, Field Service Management, and Customer Service Management.

Example: Managing customer inquiries or scheduling a field service appointment.

#### **Creator Workflow**

Allows custom app development to meet unique business needs. Includes App Engine, Integration Hub.

Example: Building a custom application to automate a specific business process.

## Now Platform User-Interfaces

**Now Platform UI (Classic UI)** - it is traditional UI, best suited by the desktop and laptop . Features a navigation pane on the left and content on the right. Allows users to access modules, forms, lists, and other functionalities.

**ServiceNow Mobile Apps** - Mobile friendly interface used to perform on the go actions like requests and approval, create incidents and notifications.

**Service Portal** - A user-friendly, responsive web interface designed for end-users. Typically used for self-service tasks, like submitting requests, searching for knowledge articles, and reporting incidents.

**Next Experience UI (Unified Navigation)** - Offers a more visually appealing and user - friendly experience.

## User , Role and Group in serviceNow

**User:** An individual who has access to the ServiceNow platform. Each user has a unique login and can have various permissions based on their roles.

It is a record in the [sys\\_user](#) table.

**Role:** A set of permissions that define what a user can see and do within the ServiceNow platform. Roles are assigned to users and can grant access to specific features or applications. They are used to set Access Controls (ACL)

It is a record in the [sys\\_user\\_role](#) table.

**Group:** A collection of users who share a common purpose or responsibility, such as a department or team. Groups can be used to manage user permissions and workflows, and can have roles assigned to them for easier access management.

It is a record in the [sys\\_user\\_group](#) table.

## Role Based Access in ServiceNow

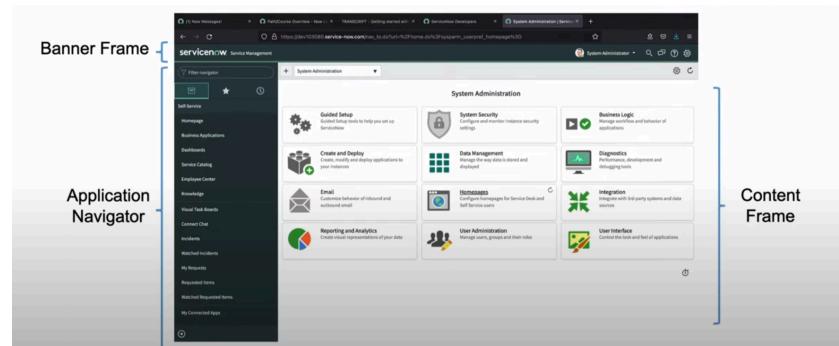
When a user logins to an instance, Servicenow validates their identity and enables access to applications and modules based on their roles and groups. It uses

1. local database authentication
2. External single sign-on(SSO)
3. Multi factor authentication

## 1.3 ServiceNow User Interface Overview

There are three parts

1. Banner Frame
2. Application Navigator
3. Content Frame



### Banner Frame Contains:

Company Logo , Navigation Menu, Global Search Bar, Discussions sidebar(chat tool) , Show Help, Notifications and User Menu

#### Important Things in **User Menu**

1. **Profile** - shows the profile of current user
2. **Impersonate User** - used to login and assume the identity of another user
3. **Elevate Roles** - Available to only base admin to elevate his role to security\_admin

**System Settings** - allows you to access and personalize some settings for your user experience in ServiceNow like themes, Display options, Time zone.

**Global Search** : Search the entire instance for records matching keywords

**Help** : Displays contextual help as available; a badge on the icon indicates embedded help is available, provides access to User Guide and documentation Search tool

**Discussions Sidebar (Connect Chat)** - Chat tool for real-time messaging

### Content Frame:

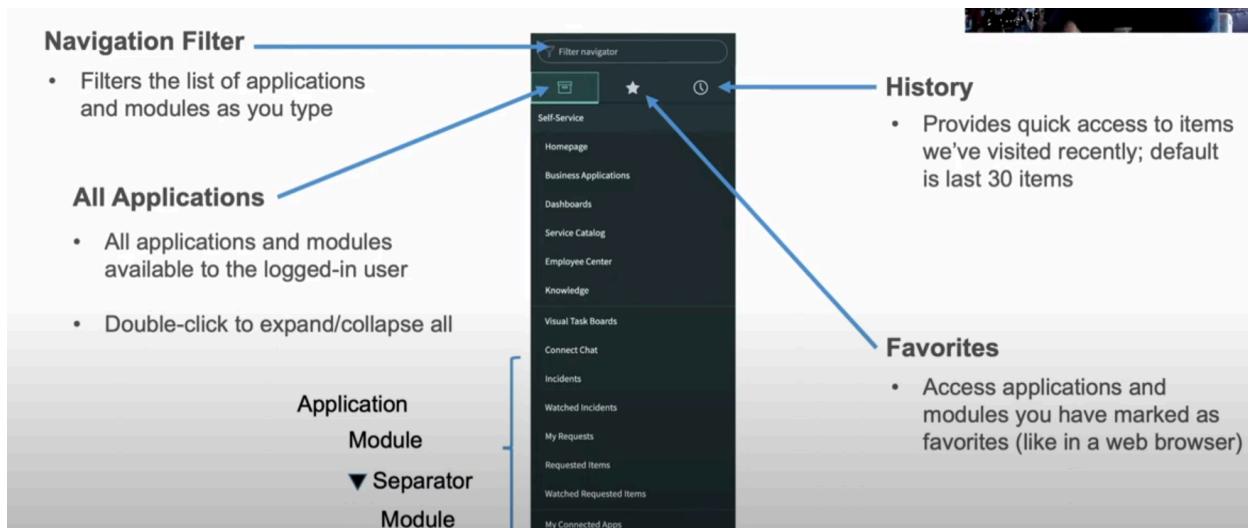
The Content Frame is the main area in the ServiceNow interface where the content related to the selected application or module is displayed. This is where users interact with forms, lists, dashboards, reports, and other data.

## Application Navigator:

The Application Navigator in ServiceNow is a component located on the left side of the interface that provides a way for users to quickly access different applications, modules, and functionalities within the platform.

Applications are the Collection of files and data , they serve as the building blocks for delivering services such as IT, HR resource management , Service Desk etc .

Modules are the individual functionalities or operations available under each Application.



We can Pin the Applications and modules to favorites for quick access

We can use the Favourites to mark the application that we frequently use and have quick access to it. We also have a History option to look at our recent actions. Default is last 30 items we have accessed

## ACL - Access Control List

it determines how the servicenow user is going to interact with the Data . It is a security imposed on tables to restrict users to interact or modify with the data of the table,It restricts the use of CRUD operations

It is stored in table **sys\_security\_acl**. We have to have a role of security admin to create or modify Acl. Thus we should Elevate role from Admin

## 1.4 ServiceNow Branding Overview

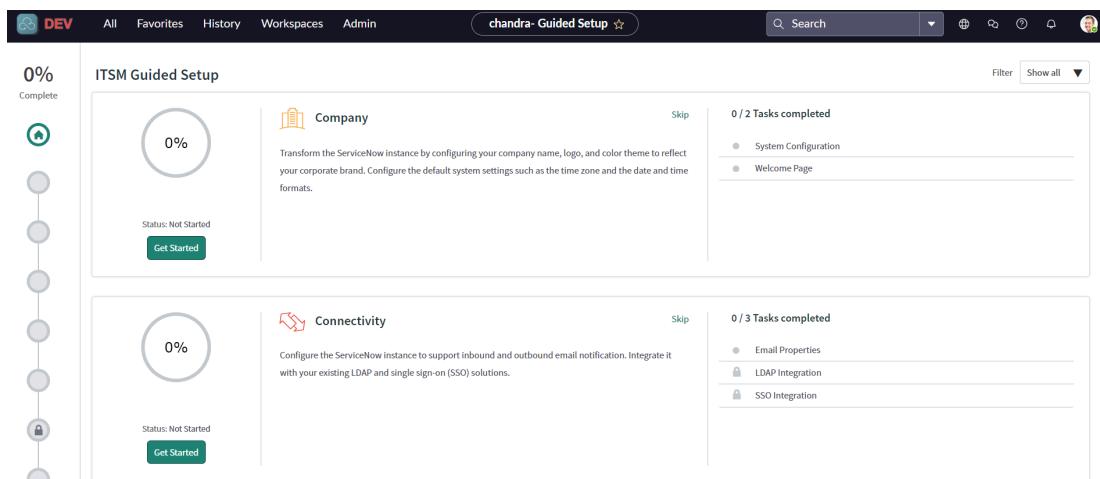
Applying your distinct corporate identity across the Now Platform UI to Create a shared identity is Called Branding in serviceNow.

### Guided Setup

Guided Setup is a feature in serviceNow that provides a structured, Step-by-step process to help administrators configure and customize their ServiceNow Instance.

It incorporated best practices into the setup process, helping the administrators configure their instance according to recommended guidelines. It includes company, CMDB, incident Management, Problem Management, Change Management, Configuration Items, Service Catalog, Knowledge management, etc

### Guided Setup for ITSM



Customization like changing logo, company name can be done using the system properties

**ALL - System Properties - System Configuration - Set timezone,date, color**

**ALL - System Properties - My Company - UI Banner - logo - Banner Text**

All the properties are a table in servicenow so these properties come under sys\_properties table

## 1.5 ServiceNow Lists and Filters

Lists in serviceNow are a type of interface that displays a set of records from a table in a grid or tabular format. Lists provide a way to view, filter, sort and interact with multiple records at once.

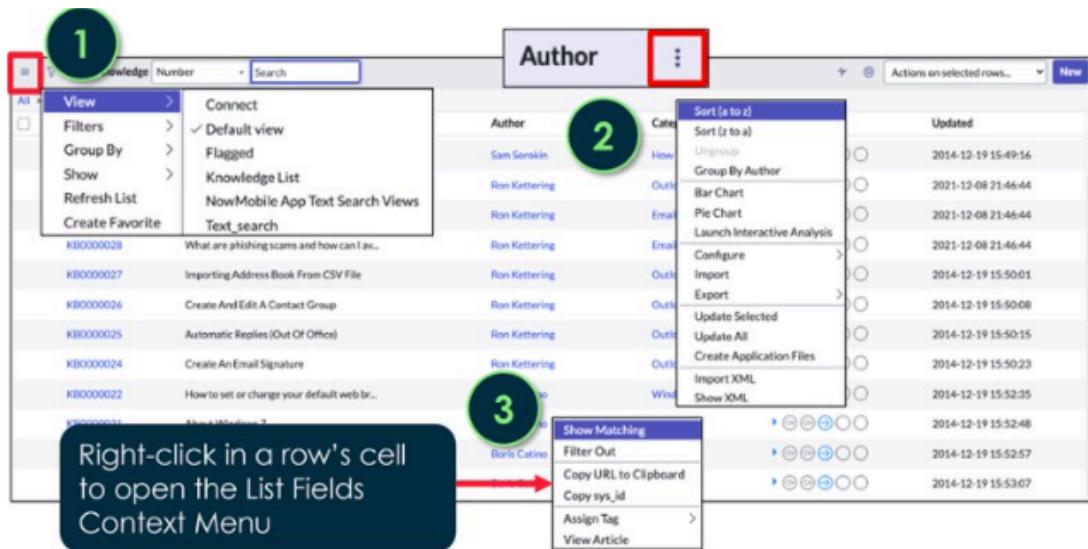
`Table_name.list` is used to display the list view of a table. `Table_name.LIST` opens list in new tab

The List Header contain many useful things to perform action on list

1. List Controls
2. Filter Lists
3. Table Search bar
4. Personalize Icon

### List Controls

In ServiceNow, **context menus in lists** provide users with quick access to actions that can be performed on list items (records) or the list itself.



For lists there are three types

1. List Control menu - Has Views, Filters, GroupBy, Refresh List, Create Favorite
2. Column option men - Has Configure, import, Reporting, Sorting
3. List field menu - used to copy sys\_id

## Views

Views enable users to quickly display the same list or form in multiple ways. System administrators can create views for lists or forms.

You can create view by selecting

Control options menu - configure - List Layout - select the fields using list Collector - Scroll Down to select view - new - enter the view name - save

You can see the created view from

List Control Menu - views

The screenshot shows the ServiceNow interface with the 'Incidents' list. A context menu is open under the 'View' option, listing various view configurations: Default view, Indicators Panel, Major incidents, Mobile, Portal, Self Service, Service Operations Workspace, SOW Landing page, SOW landing page assigned, SOW-Change-Overview, Text\_search, and Workspace. The 'Default view' option is highlighted with a checkmark. The main list area displays three incident records: INC0009009, INC0009005, and INC0009001, each with details like creation date, last update, and assignee.

## Filters in List

A filter is a set of conditions applied to a table list to isolate a subset of the data.

The three parts of a filter condition are:

1. Field: A choice list based on the table and user access rights. The choice list includes fields on related tables by dot-walking.
2. Operator: A choice list based on the field type.
3. Value: A text entry field or a choice list, depending on the field type.

### Wildcard conditions Used in column search row

\*value contains

!value does not contain

=value equals

!value does not equal

Value % starts with

% value ends with

Add filters to your Favorites by clicking the List Controls icon and selecting Create Favorite

The screenshot shows the Jira classic list interface for 'Incidents'. At the top, there's a search bar with 'Number' selected and a 'Search' button. Below the search bar are buttons for 'Run', 'Save...', 'AND', 'OR', 'Add Sort', and a magnifying glass icon. To the right of these are icons for refresh, settings, and a 'New' button. Underneath these controls, there's a 'Save as:' field with a blue border, a 'Visible to:' section with radio buttons for 'Me', 'Everyone', and 'Group', and a 'Save' button. A message says 'All of these conditions must be met'. Below this, two filter conditions are shown in a grid: 'Actual start' is set to 'on' 'Today', and 'Active' is set to 'is' 'true'. There are 'AND' and 'OR' buttons between and after these conditions, with red 'X' buttons to remove them. Below the conditions, a breadcrumb trail reads 'All > Actual start on Today > Active = true'. At the bottom, there's a header row with columns for 'Number' (with a dropdown arrow), 'Opened', 'Short description', 'Caller', 'Priority', 'State', 'Category', and 'Assig'.

In the classic list, select **Run** to see the results of your filter displayed in the list.

To save a filter, select **Save**. A new field will appear where you can name your filter. After naming the filter, select who it will be visible to, then select the Save button to the right of the name and visible to options.

The new filter will be available by selecting Filters from the list context menu.

## Breadcrumbs

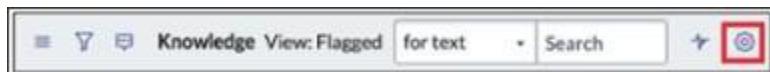
Filter conditions applied to the list are summarized in the breadcrumbs, shown in blue letters across the top of the list. Not only do the breadcrumbs provide an **"at-a-glance" view** of the filter's conditions, but they allow you to modify conditions as necessary.

For example, you can select the greater than sign before a condition to remove that condition, or select a breadcrumb to remove all of the conditions that follow.

**Group By** - It is used to group the list records based on a field.

**Refresh List** - Used to refresh list to reflect the recent changes.

## List Personalization



- Personalize List modifies the layout of a list for an individual user. It does not affect the platform default.
- Personalization should be used for temporary situations. Global changes will not be reflected in a personalized list

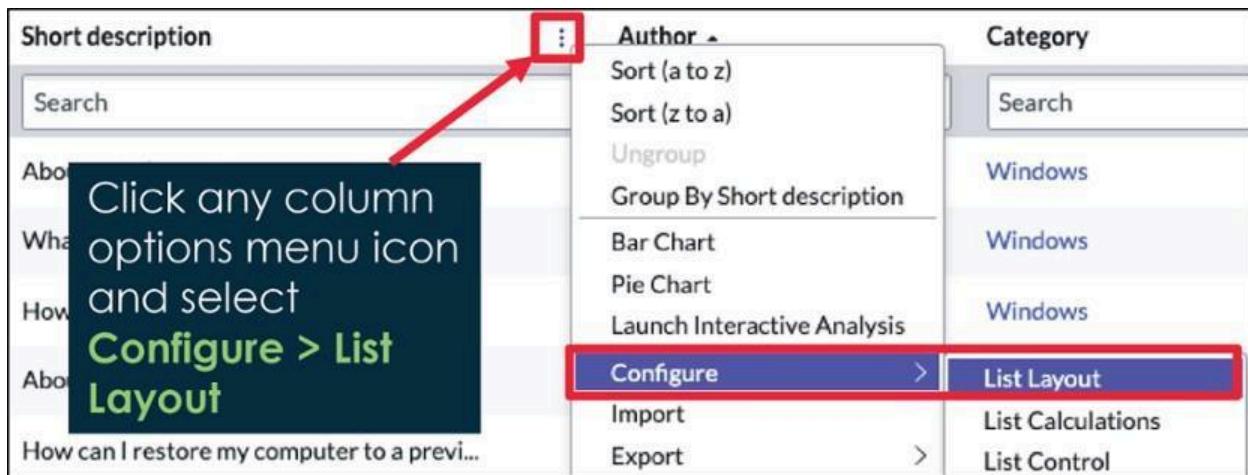
If the system administrator configures a list view a user has personalized, they will not see those newly added default changes until they choose Reset to Column Defaults.

## List Layout Configuration

List layout means adding, removing, changing order of the columns or fields on the list view. The configuration can only done by admin, and once configured it would apply to all the users

To configure the List Layout for a table:

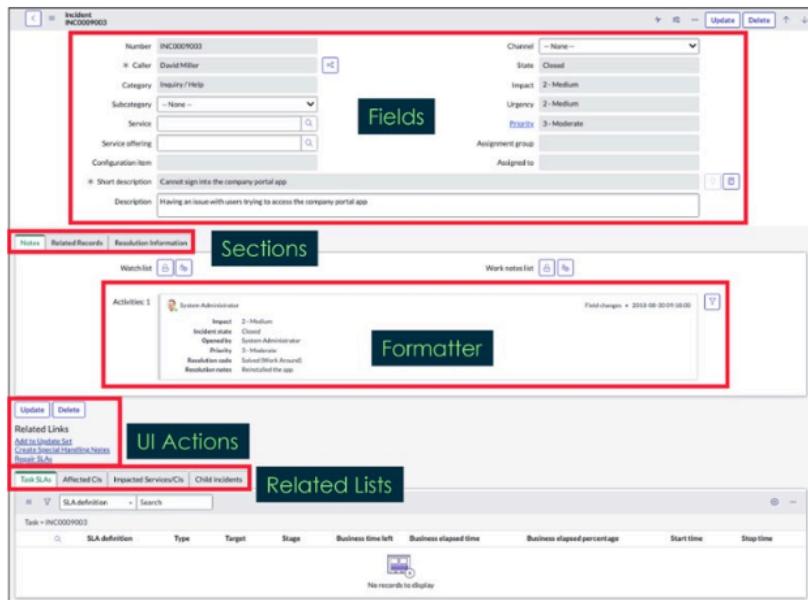
1. Navigate to the list and ensure you are in the correct view
2. Select any column options menu
3. Select Configure > List Layout



## 1.6 Forms in ServiceNow

Forms are used to display single records in servicenow will all the fields. Users can enter new records , modify records into the form. Forms contain different fields to take in the data according to the use.

### The standard Layout



- **Sections** organize fields into logical groups in a form
- A **Formatter** is a form element used to display information that is not a field on a form.
- **Related Links** - UI Actions include the buttons, links, and context menu items on forms and lists. They make the UI more interactive, customized, and specific to user activities.
- **Related Lists** show records in tables that have a relationship to the current record. For example, the User form features Roles and Groups Related

### Difference between Insert and Insert and Stay :

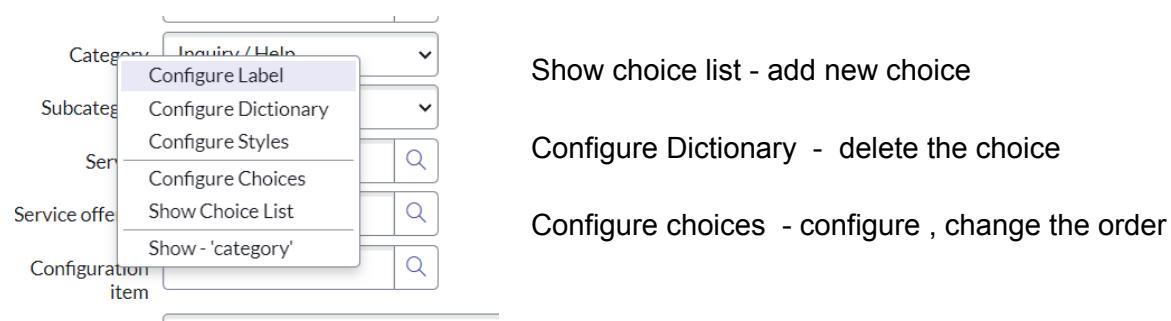
- Insert: Creates a new copy of the current record and returns to the list view or the previous page. The form is closed after the new record is created.
- Insert and Stay: Creates a new copy of the current record but keeps the user on the form view of the newly created record, allowing them to continue editing or review the new record immediately.

## Field Types

1. **Reference Field:** Query that displays records from another table.
2. **Document ID :** Used to select records from multiple tables.
3. **Date/Time:** Day and time of day, which can be selected with a calendar widget.  
Depending on the record, some calendar widgets may not display the time and will only display the date (as seen in the image above).
4. **String:** Freely populated using letters, numbers, and special characters. For 254 characters or less, the string field will be a single-line text field. Anything 255 characters or over will appear as a multi-line text box.
5. **Choice List:** Drop-down list of choices that can be configured.
6. True / False - represented using a checkbox

## Choice List

They show all the predefined values that a user could select from. We can add , remove , edit choices in choice list by right clicking on the choice field and opening From field menu



**Dependent Choice list** - The values that appear on the choice list depend on the choice made in another choice list , then it is called a dependent choice list.

## Reference Field VS Document ID

Document Id is used to specify records from multiple tables at the same time Multi table reference. While the Reference field can be used to link records from one table only single table reference.

Document Id shows a dropdown menu from which you have to select table first and then also record from table, reference field you choose only record.

Document Id Stores both table name and sys\_id , while reference field only stores sys\_id

## Formatters

A formatter is an element used to display information that is not a field in the record. Some Formatters included in the base platform are:



The **Activity Stream** is an example of a formatter; it displays a list of activities.

Examples of formatters in the base platform include:

- **Activity formatter:** Displays the list of activities, or history, on a task form. It provides an easy way to track items not saved with a field in the record, for example, journal fields like comments and work notes
- **Process flow formatter:** Displays the different stages in a linear process flow across the top of a record
- **Parent breadcrumbs formatter:** Provides breadcrumbs to show the parent or parents of the current task
- **Approval summarizer formatter:** Displays dynamic summary information about the request being approved
- **CI relations formatter:** Displays on the CI form and allows for the viewing of relationships between the current CI and related CIs

## Templates

Templates allow form fields to be populated automatically, simplifying the process of generating new records



Click the **More options icon (•••)** from the form header, then **Toggle Template Bar** to work with templates



Use the template bar at the bottom of the form to manually apply, create, or edit templates. To use a template, populate the most-used fields for a specific table, save it as a template, and then make the template accessible to users.

They have three Context menus

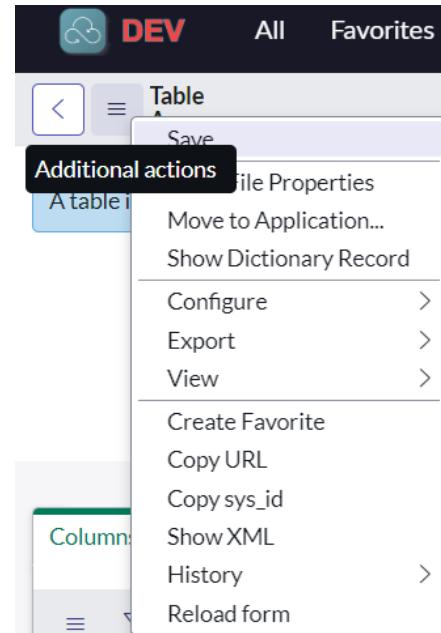
1. Form control menu / Additional Actions
2. Field context menu
3. Related list menu

## Additional Actions

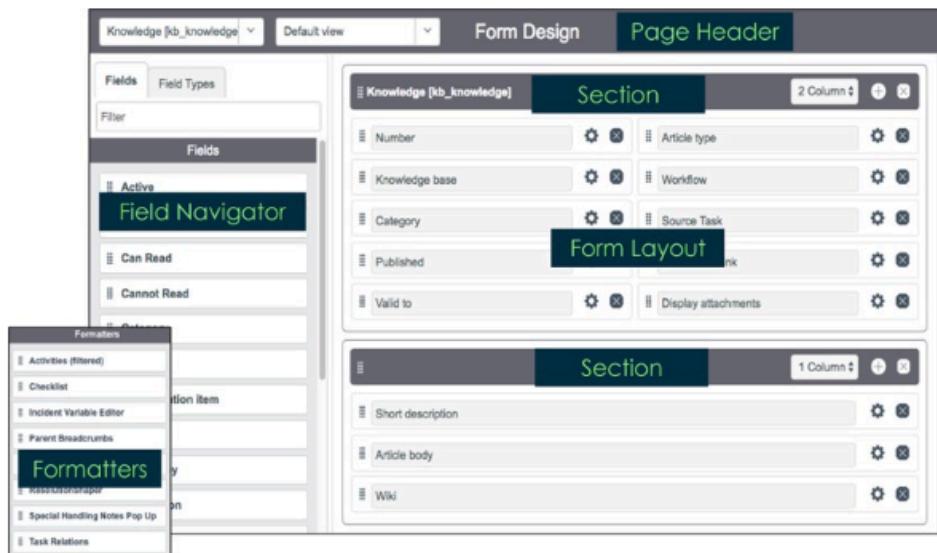
It has Form views and Configure Options

## Configure

1. From Layout
2. Form Design
3. Form Controls



## Creating and Editing Form Views with Form Design

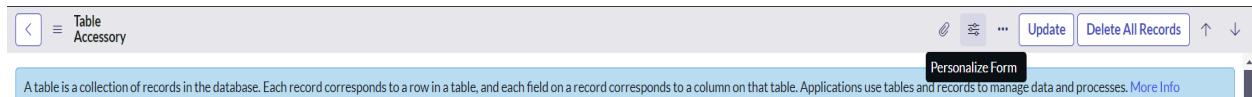


You can select or create a new view from the Page Header. Then we can drag and drop the fields we want in the form from the Field Navigator to the Form Layout.

Form Views can be viewed from additional Actions in the Form Header

## Personalization of the form

Personalizing a form will affect only what you see on a form – others will not be affected.



Mandatory fields cannot be hidden. If you navigate away from the form, the next time you go to personalize the form, you must reset your customizations to show fields that you have hidden.

To disable personalization form for the itil role, navigate to sys\_properties.list find the property `glide.ui.personalize_form.role` and set the Value to admin (to specify the role that can access form personalization).

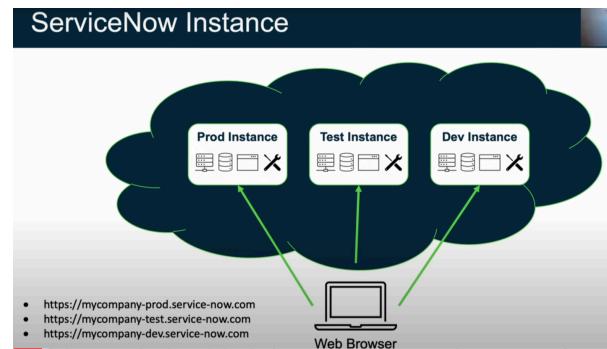
## 1.7 A Hands-on ServiceNow Tool Demo

### Instance In ServiceNow

In ServiceNow, an instance refers to a single, unique implementation of the ServiceNow Platform. Each instance is a separate and isolated environment where the platform is installed, configured, and customized according to the needs of the organization using it.

#### Instance In an organization

1. Single Instance Per organization
2. Shared Access for employees
3. Customization and configuration
4. Development and Production Instances



#### Types of Instance in Organization

1. Production - it is the instance used by employees in performing day to day tasks
2. Non Production - It is used for development, Testing, Quality assurance

Each customer organization receives a minimum of two instances of ServiceNow: production and non-production (also referred to as sub-production). They have the ability to obtain additional non-production instances to be used for User Acceptance Testing (UAT), Review, Development, or Quality Assurance (QA).

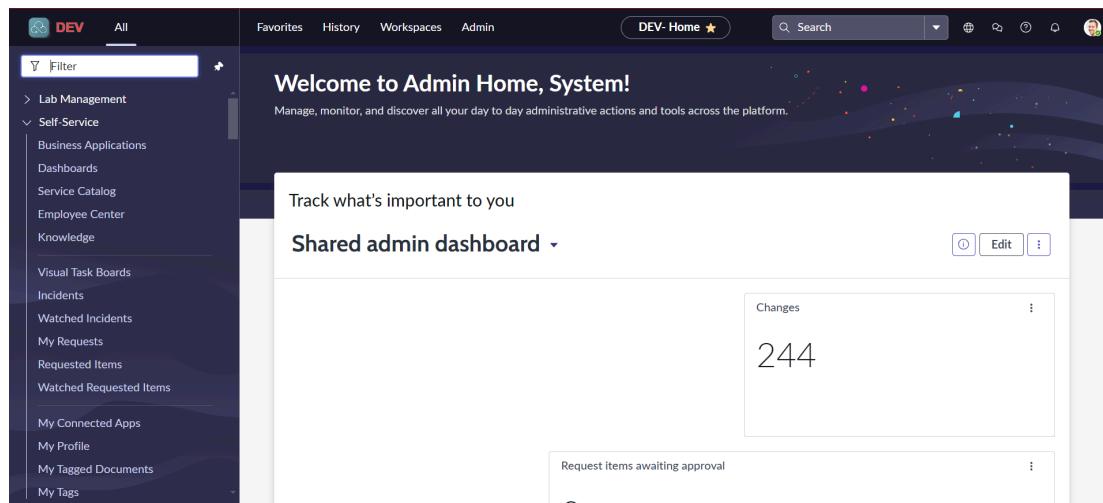
Each ServiceNow instance has a unique URL that uses a format similar to  
<https://<instance name>.service-now.com>

#### PDI - Personal Developer Instance in ServiceNow

A PDI is a free, individual instance of the ServiceNow platform provided to developers for learning, experimentation, and building applications. This can be accessed by logging into the Dev serviceNow platform and requesting a PDI

## Next Experience and Navigation

In ServiceNow, the Next Experience user interface is the main way for users to interact with the applications and information in a ServiceNow instance. You can access all applications and modules within the Platform, as well as select your user preferences, all from the banner frame! Speaking of preferences, you can personalize your instance and customize the display accessibility and notifications in the Platform



### Navigation bar Contains:

Company Logo , Navigation Menu, Favorites, Workspace, History, UI Banner, Global Search Bar, Application Scope piker, Browser tab Title, Discussions sidebar(chat tool) , Show Help, Notifications and User Menu

### Important Things in **User Menu**

4. **Profile** - shows the profile of current user
5. **Impersonate User** - used to login and assume the identity of another user
6. **Elevate Roles** - Available to only base admin to elevate his role to security\_admin
7. **Preferences** - allows you to access and personalize some settings for your user experience in ServiceNow like themes, Display options, Time zone.

The **Application Scope Picker** (represented by a globe ) is a tool that allows developers and administrators to select and switch between different application scopes within the ServiceNow platform.

**History:** Provides a list of recently viewed items and records , allowing users to easily navigate back to previously accessed content.

**Favorites:** Allows users to save and quickly access frequently used items like records, lists or reports

**Workspace** is a specialized interface that provides a modern, streamlined experience for performing tasks and managing work. Workspaces are designed to specific roles and responsibilities of the user.

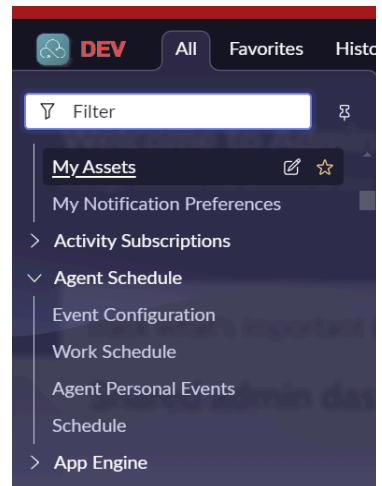
Examples: Service Operations Workspace , CMDB Workspace.

## Application Navigator:

The Application Navigator in ServiceNow is a component located on the left side of the interface that provides a way for users to quickly access different applications, modules, and functionalities within the platform.

Applications can be custom-developed to meet specific organizational needs using ServiceNow's development tools and environment. Modules are the functionalities in a Application

Or They can be accessed from the ServiceNow Store



## ServiceNow Store

It is an online marketplace where users can discover, purchase and download a variety of applications and integrations built on the ServiceNow platform. These apps and integrations are designed to extend the functionality of ServiceNow, allowing organizations to enhance their workflows and processes according to specific needs.

## ServiceNow Certification and Roles

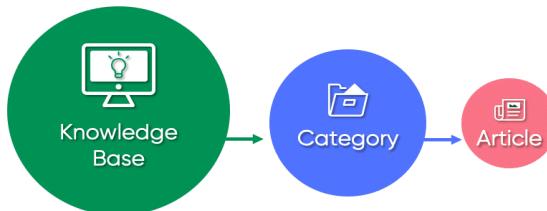
There are 5 main Certifications or roles to be done in ServiceNow

1. System Administrator
2. Developer
3. Implementer
4. Architech
5. Application Specialist

Being a Implementer enables our capabilities to integrate various applications and plugins into the serviceNow

## Knowledge Management

The Knowledge Management application in the Platform enables the sharing and viewing of information in the form of articles. Users have access to Knowledge Bases (KB) where they may interact with useful content related to their daily work tasks.



Knowledge Management allows users to create, categorize, review, approve, and browse important information in a centralized location that is shared by the entire organization. Knowledge content exists within a Knowledge Base, which is managed by one or more Knowledge Managers. With Knowledge Management, each organization can have their own Knowledge Base (KB) .

Administrators can create multiple Knowledge Bases and assign them to individual users in the Platform. This is called **User Criteria**. User Criteria defines conditions that are evaluated against users to determine which users can create (upload or author), read (view), write (edit), and retire (make articles inaccessible to all users) knowledge articles. User Criteria is applied at the Knowledge Base level in the Platform.

### ServiceNow DataBase

All the applications and features in servicenow are records in a table . Each record has a unique Sys\_id. All the tables in servicenow are stored inside sys\_db\_object .

**Sys\_db\_object** - table used to store information about all the tables in servicenow

**Sys\_dictionary** - table used to store information about all the fields of all the tables in servicenow

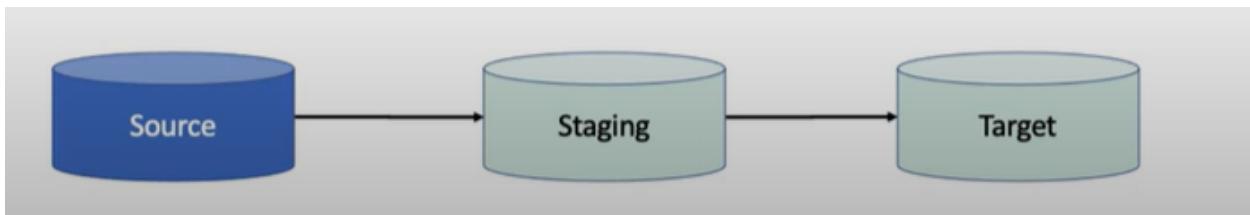
**Sys\_documentation** - tables used to store all the field labels in servicenow

CMDB Configuration Management Database in service is a centralized repository that stores information about all the Configuration Items which are required to provide IT services. Using this we effectively manage all the IT infrastructure of the Organization.

## 1.8 Introduction to Importing Data Into ServiceNow

Importing data into ServiceNow cannot be done directly , It mainly involves 3 entities

1. **Source** - The entity containing the data to be imported into ServiceNow , ServiceNow is prepared to work with many sources like Excel, CSV, JSON, JDBC, etc
2. **Staging** - A table that ServiceNow creates to temporarily store data pulled from source
3. **Target** - The ServiceNow table into which the data will be imported



## 1.9 Creating a Data Source in ServiceNow

DataSource

All the data source records are present in `sys_data_source` table, or you can access by navigation

[All - System import Sets - Administration - Data Source](#)

Creating a data source

From Sys\_data\_source table select new and fill the form

Name	I
Import set table label	
Import set table name	
Type	File
Format	CSV
Zipped	<input type="checkbox"/>
Application	Global
File retrieval method	Attachment
CSV delimiter	

Then Submit and go to attachments and attach the form you want to give as a data

## 1.10 Understanding Import Sets In serviceNow

In service now we can not directly load data into tables , Thus we use the Import sets.

Import Sets provide a mechanism to pull data into ServiceNow. Import Sets store data in Import Set tables. Any user logged in with the admin or import\_admin role can manage all aspects of Import Sets.

You have to follow the below 6 steps to import data

1. Data Source
2. Load Data
3. Import set Table
4. Transform Map
5. Transform

### Creating Import Sets:

1. **Data Source:** First, define a data source by specifying the location and format of the incoming data (e.g., CSV, Excel, JDBC).
2. **Import Set Table:** ServiceNow automatically creates an Import Set Table to temporarily hold the imported data.
3. **Load Data:** Use the "Load Data" module to import the data into the Import Set Table.

The screenshot shows the ServiceNow interface for creating an Import Set Table. The top navigation bar includes 'DEV' (highlighted in red), 'Favorites', 'History', 'Workspaces', 'Admin', and a search bar. A user named 'chandra- Load Data' is logged in. On the left, there's a sidebar with 'load data' in the search bar, 'FAVORITES' (No Results), and 'ALL RESULTS' (System Import Sets, Load Data). The main content area is titled 'Load Data' and contains the following fields:

- Import set table:** Radio buttons for 'Create table' (selected) and 'Existing table'. A 'Label' field is set to 'New table'.
- Name:** Text input field containing 'u\_new\_table'.
- Source of the import:** Radio buttons for 'File' (selected) and 'Data source'. A 'File' field shows 'Choose File CSE accent...072024.xls'.
- Sheet number:** Text input field containing '1'.
- Header row:** Text input field containing '1'.
- Submit:** A blue button at the bottom right.

Upon Submitting the Form , the data will be loaded into the Staging table and progress will be displayed

Progress

Name	ImportProcessor
State	Complete
Completion code	Success
Message	Processed: 567, inserts 567, updates 0, errors 0, empty and ignored 0, ignored errors 0 (0:00:02.899)

Next steps...

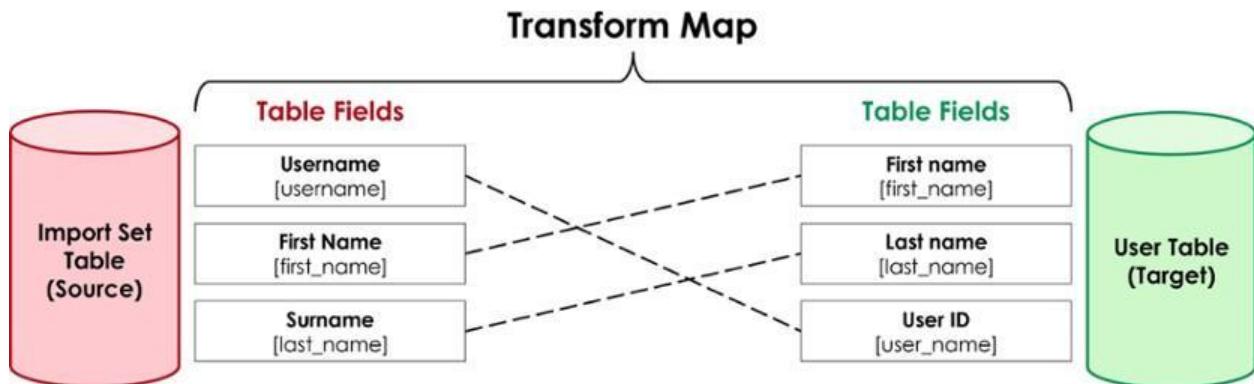
- [Import sets](#) Go to the import sets for this data load
- [Loaded data](#) Go to the newly imported data inside the staging table: u\_new\_table
- [Create transform map](#) Create a transform map for the newly staged data
- [Import log](#) View the import log

**Now we can directly go to the Import sets sets of the new created staging table ( Import set table) to build Transform Map**

## 1.11 ServiceNow Transform Maps and Transform Fields

**Transform Maps** provide a guide for moving data from Import Set (staging) tables to “Target” tables. Field mapping provides direct field-to-field data moves.

A transform map is a set of field maps that determine the relationships between fields in an import set and fields in an existing ServiceNow table, such as Incidents [incident] or Users [sys\_user].



## There are two types of mapping done in Transform Map

**Automatic Mapping Utility:** field names of the Import Set match the name of the fields on the Target table where the data will be transformed. In this case, simply click Auto Map Matching Fields in the related links in the Table Transform Maps.

**Mapping Assist Utility:** The Mapping Assist utility provides a visually intuitive environment for specifying mapping between Import Set fields and Target table fields. With the Mapping Assist utility, it is possible to map a single source field (field on an Import Set table) to multiple destination fields (fields on a Target table).

The screenshot shows the 'Mapping Assist' interface within the ServiceNow platform. At the top, there's a navigation bar with icons for search, favorites, history, and user profile, followed by the 'DEV' environment indicator. Below the header, the title 'Mapping Assist' is displayed next to a back arrow and 'Save' and 'Cancel' buttons. The main area is divided into three sections: 'Source: HHD Imports' on the left, 'Field Map' in the center, and 'Target: Holographic Handheld HHD' on the right. The 'Source' section lists fields like Asset Tag, Comment, Created, etc. The 'Target' section lists fields like Approval group, Asset, Assigned, etc. The 'Field Map' section contains a table with one row: 'Asset Tag' in the Source column and 'Asset tag' in the Target column. Navigation arrows ('>', '<') are used to move fields between the source and target lists, and 'Add' and 'Remove' buttons are located between the source and target lists. At the bottom of the interface are 'Save' and 'Cancel' buttons.

When all fields are matched properly, click **Transform** in the related links to begin transforming data onto the destination table.

## Process to import data into servicenow table from excel

All - System import sets - load data - creating import set table - choosing the file - loading data into import set table - open the import set table - go to related links - transform map - Assist mapping - select the Servicenow table - map the fields - save - Transform

The following steps (process) can be completed by any user with the role import\_admin or import\_set\_loader and import\_transformer.

you can also use import option in Column options menu for excel and import XML for XML data

## 1.12 ServiceNow incident Management and Task Administration

### Tasks in ServiceNow

A task is some item of work that needs to get done. In serviceNow, each Task is represented by a record in the Task table.

All - Navigation - Task.list

Three of the most commonly used tasks are

1. Change Request
2. Incident
3. Problem

These are the children of the task table, they inherit the properties of the task table. Task table stores attributes of all types of the task and child children store attributes to specific task needs.

**To administer a proper Task Management the following can be done**

Assignment Rules - auto assign tasks to users and groups best to solve

Service Level agreements - to ensure task completion in allotted time

Inactivity Monitors - to determine if the task is not touched

Workflows to process the task execution

### Task Assignment

- Tasks can be assigned to an individual User or a Group of Users (or both)



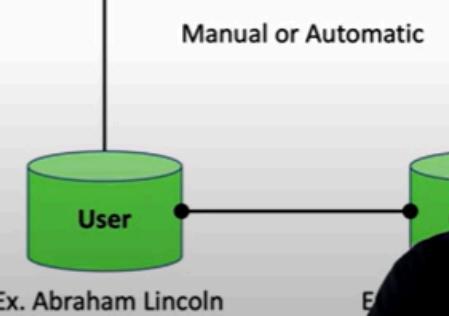
ID	Caller	Probable Cause	Assigned to	Assignment Rule
002	xx	xx		

### Assignment Rules

- AppNav: All > System Policy > Rules > Assignment
- Table: Assignment Rule [sysrule\_assignment]

### Assignment Lookup Rules

- AppNav: All > System Policy > Rules > Assignment Lookup Rules
- Table: Assignment Data Lookup [dl\_u\_assignment]



Assignment Rules are used to automatically assign tasks to users and groups , they are stored in `sysrule_assignment`

ALL - system Policy - Rule - Assignment

Assignment rules are executed in the lowest order of the Execution Order, when certain conditions are met

### **Creating an Assignment Rules**

New - Applies to - Table - Conditions - add condition -  
- Assign to - User - Group - save

### **Assignment Lookup rules**

They can only be applied to incident tasks, not all the tasks, they are stored in `dl_u_assignment` table. They are way less powerful than assignment rules.

### **Resolving tasks from user perspective**

We can view the tasks assigned to the user in Service Desk Navigation in my groups work or my works

### **Task Collaboration and User Presence**

User Presence allows multiple stakeholders to view and update records Simultaneously.

#### **Task Collaboration**

**User Presence** allows multiple stakeholders to view and update a record simultaneously

The **Active Viewers Icon** will display on the header bar when another user is viewing the record at the same time.



The **Real-time Editing (Pulse) Icon** will display beside a field that has been changed by another user.



## Visual Task Boards (VTBs) in ServiceNow.

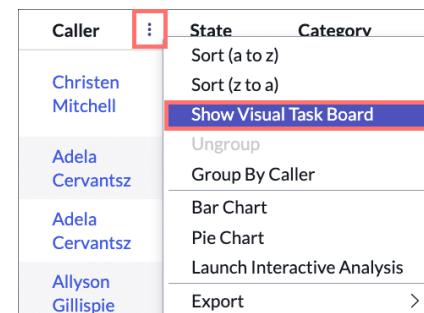
Transform your lists and forms into an interactive graphical experience .VTBs can have a number of functions in the Platform. We can use them to create a personal to-do list, and collaborate in real-time with group members on assignments. Displayed graphically as lanes and cards, VTBs provide a landing page to view and organize work in ServiceNow.

### All - self service - Visual Task Board

We can create a VTB from a list view by selecting a few records , selecting the Actions on selected rows dropdown menu, and then selecting Add to Visual Task Board.

You may also show a VTB from a list view, by breaking up data for whichever column the VTB is created from. All you have to do is select Column options (from any column) and select Show Visual Task Board.

### Cards and Lanes



Cards represent the records and Lane Represents the grouping mechanism used to create the VTB

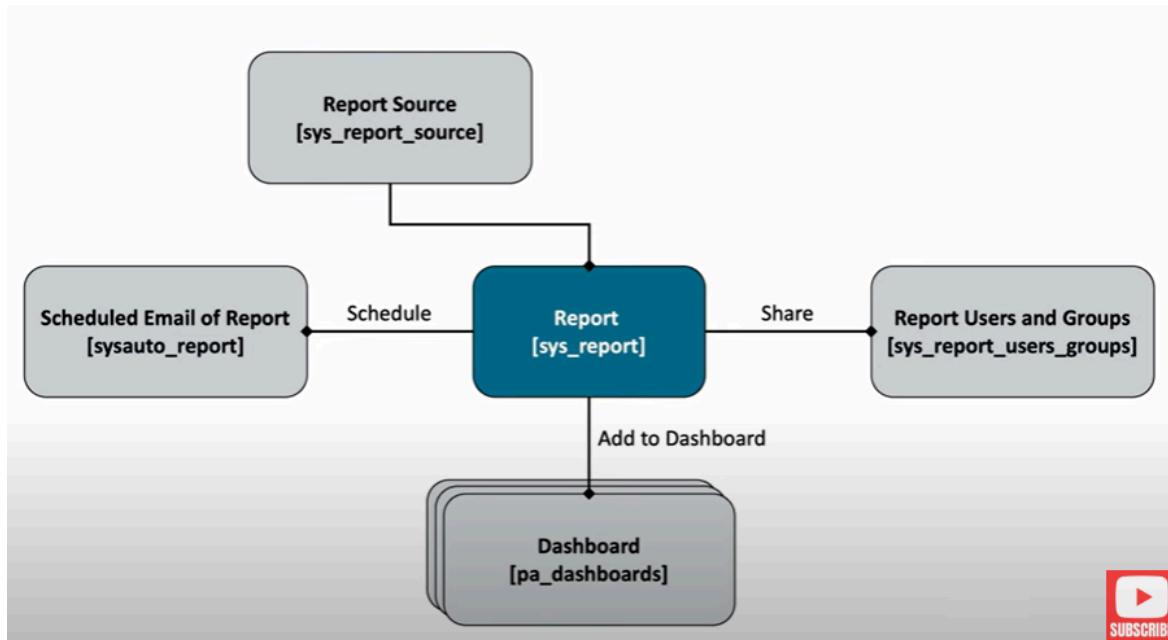
## Types of Visual Task Board

1. Guided / Data Driven - Created from list using an attribute that has a predefined set of values as lanes
2. Freeform - Not created from list, used for personalized Work management

## 1.13 ServiceNow Reporting

Reports are a way to visualize ServiceNow data and can be viewed and analyzed by you and your colleagues. Data can be visually represented in many ways, including bar charts, pie charts, dials, lists, pivot tables, donuts, and more.

Reports can be run manually or scheduled to run automatically. Reports are interactive. Users with access can drill down into the report to view and manipulate the underlying records.



**Sys\_report** - stores all the reports in the instance.

**Report Source - sys\_report\_source** table stores the filters condition of list that are used to populate the report.

**Sys\_report\_users\_groups** - used to share reports to groups and tables.

**Dashboard - pa\_dashboards** used to store multiple reports

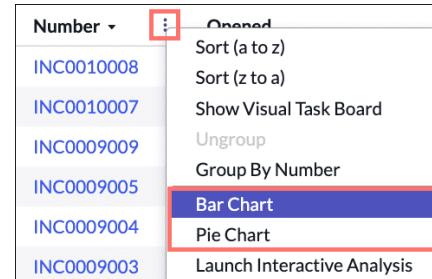
## Predefined reports

All > Reports > View / Run

we can create our own reports by navigating to

**All > Reports > Create Report module.**

you can simply select most column context menus in any list to generate a report directly from the data in that list.



**Creating a Report All > Reports > create new**

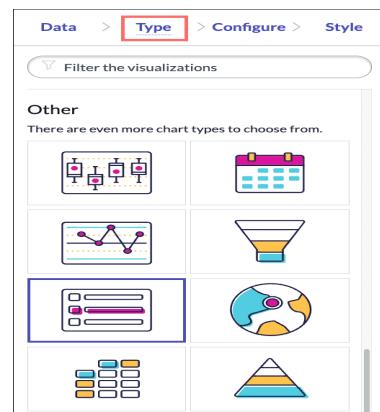
Data > Type > Configure > Style

\* Report name  
Active Change Requests

\* Source type  
Table

\* Table  
Change Request [change\_request]

Description  
There is no description for this table. To add a description, please contact your admin.



Data > Type > Configure > Style

Choose columns

Group by

Active ▾

Additional group by

Data > Type > Configure > Style

Title

Show chart title Report only

Chart title

Size of the chart title 16 px

Chart title color Black

Title horizontal alignment Center

## Creating a report from studio

All - System Applications - Studio - Select Application - File - Create New - Report - from this point it is the same again i.e Data - Type - configure - style

# Scheduling Reports

All - Reports - view / run - open report - sharing icon - schedule - fill the form

Schedule an email containing this report

Name	Scheduled execution of Users by Depart	Application	Global
Report	Users by Department	Run	Monthly
Users	Abraham Lincoln, Fred Luddy	Day	1
Groups	CAB Approval	Time	Hours 00 00 00
Email addresses	jtt0340@gmail.com	Conditional	<input type="checkbox"/>
Subject	Monthly copy of users by department report.		
Introductory message	<p>B I U ↶ ↷ Verdana 8pt</p> <p>Text alignment: Left, Center, Right, Justify; Text size: 8pt, 9pt, 10pt, 11pt, 12pt, 14pt, 16pt, 18pt, 20pt, 24pt, 28pt, 32pt, 36pt, 40pt, 48pt, 56pt, 64pt, 72pt, 80pt, 96pt, 112pt, 128pt, 144pt, 160pt, 176pt, 192pt, 208pt, 224pt, 240pt, 256pt, 272pt, 288pt, 304pt, 320pt, 336pt, 352pt, 368pt, 384pt, 400pt, 416pt, 432pt, 448pt, 464pt, 480pt, 496pt, 512pt, 528pt, 544pt, 560pt, 576pt, 592pt, 608pt, 624pt, 640pt, 656pt, 672pt, 688pt, 704pt, 720pt, 736pt, 752pt, 768pt, 784pt, 800pt, 816pt, 832pt, 848pt, 864pt, 880pt, 896pt, 912pt, 928pt, 944pt, 960pt, 976pt, 992pt, 1008pt, 1024pt, 1040pt, 1056pt, 1072pt, 1088pt, 1104pt, 1120pt, 1136pt, 1152pt, 1168pt, 1184pt, 1200pt, 1216pt, 1232pt, 1248pt, 1264pt, 1280pt, 1296pt, 1312pt, 1328pt, 1344pt, 1360pt, 1376pt, 1392pt, 1408pt, 1424pt, 1440pt, 1456pt, 1472pt, 1488pt, 1504pt, 1520pt, 1536pt, 1552pt, 1568pt, 1584pt, 1600pt, 1616pt, 1632pt, 1648pt, 1664pt, 1680pt, 1696pt, 1712pt, 1728pt, 1744pt, 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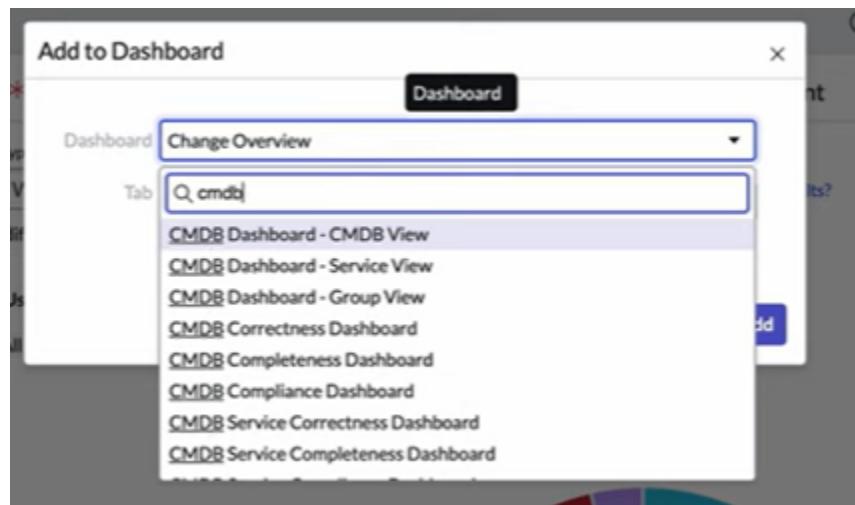
## Sharing the reports

All - Reports - view / run - open report - sharing icon - share - fill the form

## Dashboard in serviceNow

A dashboard is a custom arrangement of widgets and enables you to display multiple performance analytics and reporting on a single screen.

All - Reports - view / run - open report - sharing icon - Dashboard - fill the form



## **1.14 Low Code No Code Development**

Low Code No Code development is all about eliminating the gap between the business, IT, and digital transformation. Low code No code applications help non IT professionals to equip tools to build traditional IT applications with minimal programming Knowledge.

App Engine Studio ( AES) : Guided experience for creating everything you need for low code/no code applications, build tables , import data , create Workflows and manage security.

Now Experience UI Builder : Create Workspaces and portals via drag-and drop

Flow Designer : Use natural language to automate workflows, approvals, tasks, notifications and records operations without writing any code.

### **Pros and Cons of Low Code / No Code**

#### Pros

1. Faster Development
2. Reduce Need for extensive coding
3. Allows non developers to build applications empowering business users

#### Cons

1. Limited Functionality and Customization
2. Scalability Issues