

WELCOME TO SERVICENOW

ServiceNow Platform Overview

“What is ServiceNow? It’s a platform; a piece of technology that lets people automate workflow in a business. It was infuriating to me that IT people could make regular business people feel so silly or ignorant. So for the first 9 months, we built a platform, showed it to a number of people and it was received with a resounding, yawn. Now, it’s almost 15 years on, and they’re using The Platform exactly as we had envisioned.”

Tips for users of assistive technology

What is an instance?

If you are a user of assistive technology, we want your experience navigating this course to be a great one. To that end, the document below offers helpful tips specific to the technology you use.

"Welcome to ServiceNow" Knowledge Check

The "Welcome to ServiceNow" Course Overview knowledge check is associated with what you learned in the course overview.

1. Where would you go to explore course options depending on the roles that you're interested in?

- ServiceNow Website (servicenow.com)
- ServiceNow Product Documentation (docs.servicenow.com)
- ServiceNow Community (community.servicenow.com)
- ServiceNow University (learning.servicenow.com)

2. Which job role or function can benefit from completing Welcome to ServiceNow?

- Any role or function
- System Administrator
- Human Resources (HR)
- Platform Security



Next Experience Unified Navigation

The ServiceNow **Next Experience Unified Navigation** is the main way for users to interact with the applications and information in a ServiceNow instance. The Unified Navigation features offered through the Next Experience helps you to navigate and access components of ServiceNow. Notable Next Experience features include real-time form updates, user presence, and menus for easy access to all applications, modules, in addition to menus for your favorites, history, and workspaces.

Instance Personalization

User Preferences

Next Experience offers global preferences to customize your instance UI. Select the User menu, then Preferences to customize the behavior of the Next Experience across your instance. You can customize the following preference types:

- Display
- Accessibility
- Workspaces
- User Experience
- Theme
- Notifications
- Language & Region

Forms Module

Task Instructions:

1. Navigate to **All > Problem > Create New.**
2. Fill out the form:
 - Category: **Network**
 - Service: **IT Services**
 - Impact: **2 - Medium**
 - Urgency: **2 - Medium**
 - Assignment group: **Network**
 - Problem statement: **Unable to connect to network server.**
 - Description: **The department network server seems to be going down multiple times a week and I currently can't connect to it. We would like a more permanent solution.**
3. Select the **Form Context Menu** to **Save** the record.
4. Select the **Form Context Menu** and select **Create Favorite**. Then, select More in the **Favorite** added pop-up.
5. Select *any icon* and *any color*.
6. Select **Save edits**.
7. Select **Go to activity stream** in the form header or navigate to the section of the form where you can keep track of any *Work Notes* on the problem.

Lists and Filters Task

Task Instructions:

1. Navigate to the All menu and select Incident > All.
2. Select Show/hide filter (funnel) icon.
3. Set the field, operator(filter/condition), and value choice lists to the following:

State | is not | Closed AND

Assignment Group | is not empty AND

Assigned to | is not empty

4. Select Run.
5. Select the Priority column to sort the list so that 1-Critical incidents appear first in the list.
6. Select the State column of all *1-Critical incidents* and use the List Editor to change the State to In Progress. Select the green check mark to save the list changes. (*10 rows will be updated.*)
 - TIP: To use the List Editor, press the *Shift* key on your keyboard, and use your mouse to click and drag to select multiple fields in a column. This allows you to edit multiple records at the same time.
7. Select the Personalize List (gear) icon to remove the "Opened" and "Updated by" columns.
8. Locate INC0000055 and set the Category to Software

The screenshot shows a browser window with the URL learning.servicenow.com/lxp/en/pages/learning-course?id=learning_course&course_id=92e0b5fb97d742506eedb30e6253af0&group_id=c2f031b3c39f0a100b9cd0af050131f6&child_id=56f071b.... The page title is "List Views and Personalization". On the left, there's a sidebar with a "Lists and Filters" section showing a progress bar at 100% COMPLETE. Below it are sections for "List Views and Personalization", "Filters and Tags", "Now You Try: Lists and Filters", and "Lists and Filters Knowledge Check", each with a green checkmark. The main content area has a dark header "Table data displayed as lists". Below it is a screenshot of a ServiceNow table view titled "Incidents". A red box highlights a row, with the text "Each row represents one record". Another red box highlights a column, with the text "Each column represents one field". The table has columns for Number, Owner, Short Description, Color, Priority, State, and Category. Data rows show various incident details like "INC0000055" with "Software" category and "INC0000056" with "Hardware" category. At the bottom of the main content area, there's a paragraph about lists and their components (rows, columns, records, fields). The status bar at the bottom shows the date "05-11-2025" and time "14:35".

Assessment Simulator Task 1

Personalize Your Instance

1. Impersonate 'Platform User'.
2. Set your instance preferences to **show date and time formats on forms**.
3. Set your instance preferences to **show help tips on forms**.

The screenshot shows the ServiceNow Service Operations Workspace. A modal window titled "Accessibility" is open, listing several options with toggle switches:

- Show date and time formats on forms (on)
- Enable data table for charts and graphs (off)
- Replace colors with patterns in charts and graphs (off)
- Reduce motion (off)
- Enable keyboard shortcuts (on)
- Enable accessibility in classic (off)
- Show all buttons without the need to hover (off)
- Enable keyboard focus on truncated text (off)

A sidebar on the right shows the user profile "Platform User" and various navigation links. The status bar at the bottom indicates it's 14:05 on 05-11-2025.

The screenshot shows the ServiceNow Service Operations Workspace. A modal window titled "Display" is open, listing several options with toggle switches:

- Organize form sections and related lists into tabs in classic forms (on)
- Load related lists in classic forms (set to "With the form")
- Put line breaks in lists (on)
- Use compact spacing mode (off)
- Show help tips on forms (on)
- Always show top navigation (off)
- Show ability to quick edit favorites (on)
- Show results from other menus when filtering menu items (on)

A sidebar on the right shows the user profile "Platform User" and various navigation links. The status bar at the bottom indicates it's 14:03 on 05-11-2025.

Assessment Simulator Task 2

Favorite a Filtered List

1. Impersonate Platform User.
2. Personalize the list of Open (**Service Desk>Incidents**, not Self-Service) Incidents to show Priority as the 2nd column in the list.
3. Build a Filter and run the list of Open incidents to show incidents for which the assigned to field is empty and the Assignment Group is Service Desk.
4. Use the List Editor to assign all incidents in the list to Platform User (7 incidents).
5. Filter a new list of Open incidents for which the assigned to field is Platform User and the Assignment Group is Service Desk (10 incidents).
6. Make the list a favorite and name it My Incidents. Select a color and icon of your choice.

The screenshot shows a ServiceNow browser interface with the title bar "servicenow". The top navigation bar includes links for Learning Dashboard, Micro-Certification, Github Creation and, Learning Course, Incidents, and Classic | Unified Nav. The main content area is titled "Incidents" with a star icon. A search bar is present above the list. The list itself is titled "All > Active = true" and displays 20 rows of incident data. The columns include Number, Opened, Short description, Caller, Priority, State, Category, Assignment group, Assigned to, Updated, and Updated by. The "Priority" column is highlighted with a blue background for the first five rows. The "Assigned to" column shows "(empty)" for most rows, except for the fifth row where it is "admin". The "Updated by" column also shows "admin" for most rows. The bottom of the list shows a navigation bar with "1 to 20 of 46" and arrows, along with a "New" button. The status bar at the bottom right shows "ENG IN" and the date "05-11-2025".

Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0010008	2022-06-27 16:11:42	Cannot access playbook.	Allyson Gillispie	5 - Planning	In Progress	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:02	admin
INC0010007	2022-06-27 16:10:58	Oh no! Blue screen on my laptop.	Krystle Stika	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:28	admin
INC0010006	2022-06-27 16:09:53	Monitor has broken pixels.	Felipe Gould	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:44	admin
INC0010005	2022-06-27 16:06:05	Cannot log into email.	Abel Tuter	3 - Moderate	On Hold	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:17:58	admin
INC0010004	2022-06-27 16:04:49	Audio from conference calls not working.	David Loo	5 - Planning	In Progress	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:18:12	admin
INC0010001	2022-06-27 15:59:38	Bluetooth keyboard and mouse broken.	Beth Anglin	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:18:31	admin
INC0009009	2018-08-30 08:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:30:24	admin
INC0009005	2018-09-01 04:35:21	Email server is down.	David Miller	● 1 - Critical	New	Software	(empty)	(empty)	2018-12-13 07:18:55	admin
INC0009001	2018-09-12 03:56:26	Unable to post content on a Wiki page	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:32:42	admin
INC0008112	2019-07-29 18:48:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-29 18:49:28	admin
INC0008111	2019-07-22 21:04:47	ATF : Test1	System	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 21:05:10	admin

Assessment Simulator Task 3

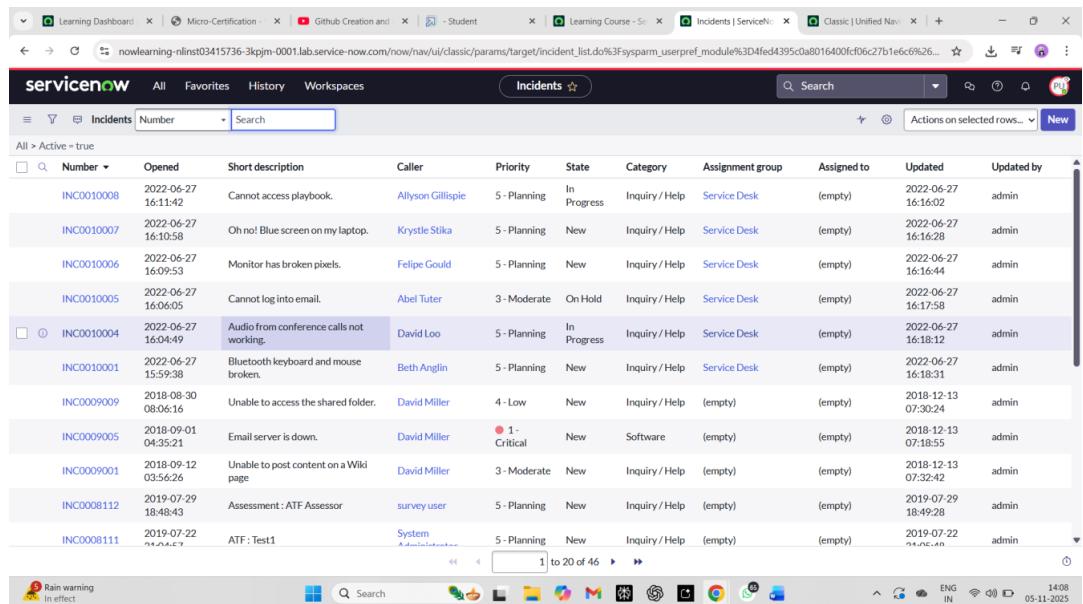
Create and Comment on a Record

Assume that Adela Cervantsz reached out via a phone call describing intermittent email access for her group.

Create and submit a new incident to assign this trouble ticket to the Software group. Then post a Customer visible comment to the incident.

Incident details:

- Subcategory: Email
- Impact: 2 – Medium
- Urgency: 2 – Medium
- Assignment group: Software
- Short description: Intermittent email access
- Description: The department is experiencing intermittent email access. Please help!
- Post a comment to the incident: The software group is investigating similar incidents and will respond when they have a resolution.



The screenshot shows a ServiceNow interface with the title 'Incidents' at the top. Below it is a table with columns: Number, Opened, Short description, Caller, Priority, State, Category, Assignment group, Assigned to, Updated, and Updated by. There are 46 rows of data, each representing an incident. The first few rows include: INC0010008 (Opened 2022-06-27 16:11:42, Caller Allyson Gillispie, Priority 5 - Planning, State In Progress, Category Inquiry / Help, Assignment group Service Desk, Updated 2022-06-27 16:16:02, Updated by admin); INC0010007 (Opened 2022-06-27 16:10:58, Caller Krystle Stika, Priority 5 - Planning, State New, Category Inquiry / Help, Assignment group Service Desk, Updated 2022-06-27 16:16:28, Updated by admin); INC0010006 (Opened 2022-06-27 16:09:53, Caller Felipe Gould, Priority 5 - Planning, State New, Category Inquiry / Help, Assignment group Service Desk, Updated 2022-06-27 16:16:44, Updated by admin); and INC0010005 (Opened 2022-06-27 16:06:05, Caller Abel Tuter, Priority 3 - Moderate, State On Hold, Category Inquiry / Help, Assignment group Service Desk, Updated 2022-06-27 16:17:58, Updated by admin). A search bar and a 'New' button are visible at the top of the table area.

Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0010008	2022-06-27 16:11:42	Cannot access playbook.	Allyson Gillispie	5 - Planning	In Progress	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:02	admin
INC0010007	2022-06-27 16:10:58	Oh no! Blue screen on my laptop.	Krystle Stika	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:28	admin
INC0010006	2022-06-27 16:09:53	Monitor has broken pixels.	Felipe Gould	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:16:44	admin
INC0010005	2022-06-27 16:06:05	Cannot log into email.	Abel Tuter	3 - Moderate	On Hold	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:17:58	admin
INC0010004	2022-06-27 16:04:49	Audio from conference calls not working.	David Loo	5 - Planning	In Progress	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:18:12	admin
INC0010001	2022-06-27 15:59:38	Bluetooth keyboard and mouse broken.	Beth Anglin	5 - Planning	New	Inquiry / Help	Service Desk	(empty)	2022-06-27 16:18:31	admin
INC0009009	2018-08-30 08:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:30:24	admin
INC0009005	2018-09-01 04:35:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)	2018-12-13 07:18:55	admin
INC0009001	2018-09-12 03:56:26	Unable to post content on a Wiki page	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2018-12-13 07:32:42	admin
INC0008112	2019-07-29 18:48:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-29 18:49:28	admin
INC0008111	2019-07-22 17:00:27	ATF: Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 18:49:28	admin

Assessment Simulator Task 4

Create a Visual Task Board (VTB) from a List

Task Instructions:

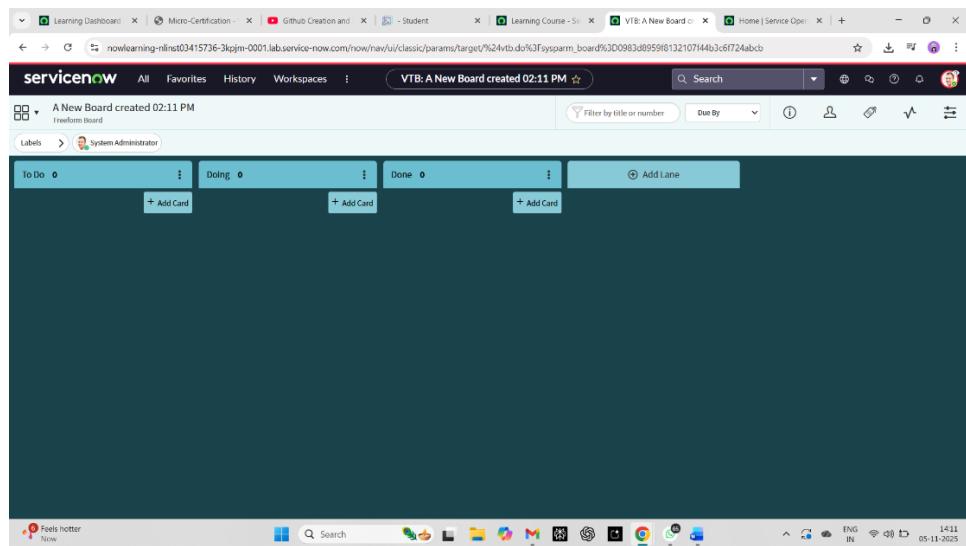
NOTE: This task validation is dependent on validating task 2. If you did not complete the “Favorite a Filtered List” activity, you will not be able to complete this activity.

Create a VTB

1. Create a new **freeform visual task board**.
2. Name the board *My Incidents*.
3. Rename the first two lanes *In Progress* and *On Hold*.
4. **Delete** the lane named *Done*.

Populate and arrange the VTB

1. Navigate to your favorited item: **My Incidents**
2. Select the 3 **On Hold** incidents (INC0000054, INC0000017, and INC0010005) and use the **Actions on selected rows** feature to add them to your VTB.
3. View your VTB and **move the 3 On Hold** incidents to the *On Hold* lane.
4. Navigate back to your favorited item: My Incidents
5. **Filter out** the On Hold incidents.
6. Use the Select All feature to add the remaining incidents to the *In Progress* lane of your VTB.



Assessment Simulator Task 5

Order an item from Service Catalog

Task Instructions:

Order an **Apple Watch** from **Self Service > Service Catalog**.

1. Search for and select the **Apple Watch**
2. **Order** the watch.
3. **Favorite** the Apple Watch request from the Order Status screen.

The screenshot shows a ServiceNow web interface. The top navigation bar includes links for Learning Dashboard, Micro-Certification, GitHub Creation, Student, Apple Watch, Learning Course, VTB: A New Book, Home | Service Catalog, and more. The main menu has options for All, Favorites, History, Workspaces, Admin, and Apple Watch. A search bar is present, along with a 'Search catalog' button. The current page is 'Service Catalog > Hardware > Apple Watch'. The main content area displays an image of an Apple Watch with a white band. Text on the page includes: 'Apple Watch - Their most personal device ever', 'We are making the Apple Watch available to all field technicians so they can stay up with workloads, get notifications, and take quick actions for approvals and assignments.', 'We are providing the Sport model with:', and a bulleted list: '• 42mm space gray and black sport band', '• 42mm silver aluminum with either the white or blue band'. To the right, there is a sidebar with an 'Order this Item' section containing fields for Price (£267.8759), Quantity (1), Subtotal (£267.8759), Delivery time (2 Days), and buttons for 'Order Now' and 'Add to Cart'. Below this is a 'Shopping Cart' section stating 'Empty'. At the bottom of the page, a Windows taskbar shows various icons and system status information, including the date 05-11-2025.

Assessment Simulator Task 6

Create a Dashboard and Add a Visualization

Task Instructions:

As a Platform User, you want to create a dashboard where you can quickly view the status of incidents you are responsible for.

1. Create a new dashboard and name it *My Incidents Overview*.
2. From your *Favorites > My Incidents* list, create a bar chart from the *Priority* column.
3. In the Visualization Designer, name the chart *Incidents by Priority*.
4. In the Visualization Designer, change the color of the chart to use the Color Palette, Default UI14.
5. Save the visualization.
6. Navigate back to the *My Incident Overview* dashboard and add the *Incidents by Priority* chart.

The screenshot shows the ServiceNow Platform Analytics dashboard library. The top navigation bar includes links for Learning Dashboard, Micro-Certification, Github Creation, Apple Watch, Learning Course, VTB, Home | Service, and a search bar. Below the navigation is a secondary header with links for All, Favorites, History, Workspaces, Admin, and Platform Analytics. A search bar and a 'Create new dashboard' button are also present. On the left, a sidebar lists filters: Recent, Bookmarked, Certified, Owned by me, Shared with me, and All (which is selected). The main area displays a grid of 16 dashboard cards. Each card has a title, a preview image, and the owner information. The cards include: Analytics Usage Overview (Owner: System Administrator), Application Services Dashboard, Asset Overview (Owner: System Administrator), Change Request, Data Classification, Data Usage Visualization Console, Gen AI Actions Dashboard, Guided Tours – Operational Reporting (Owner: System Administrator), Incident Management, Instance Scan Results Next Experience Dashboard (Owner: System Administrator), Interaction, IT Agent Dashboard (Owner: System Administrator), Knowledge Management Overview (Owner: System Administrator), Legacy Usage Overview, MID Server, My Assets (Owner: System Administrator), On-Call Management, Password Reset Overview, Problem Management, and Request Management. At the bottom, the Windows taskbar shows various open applications like File Explorer, Mail, and a browser, along with system icons for battery, signal, and date/time (14:14, 05-11-2025).

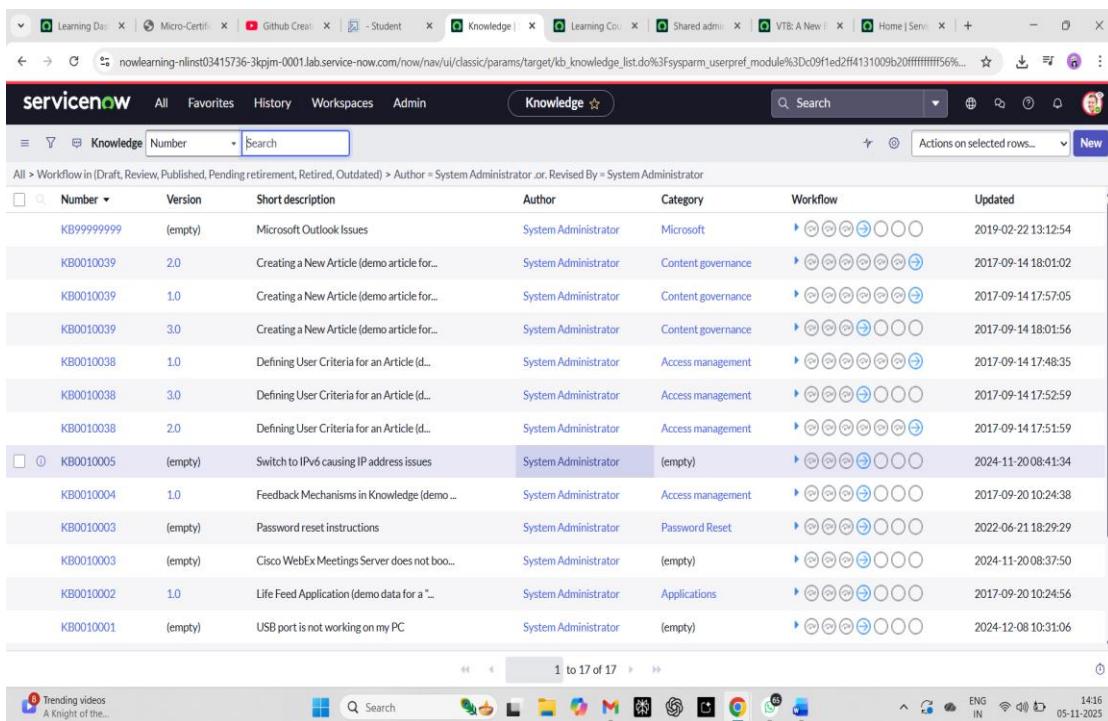
Assessment Simulator Task 7

Flag and Comment on a Knowledge Article

Task Instructions:

A caller is unable to create a new distribution list in Outlook, because distribution lists have been given a new name in Outlook.

1. Find a knowledge article in the **IT knowledge base** titled, “**Create and Edit a Contact Group**” to help her with her task.
 2. Notice the numbering formatting in the article needs cleanup. **Flag the article** and notify the owner that: **The first procedure needs numbering corrected.**
 3. Add a comment to the article: **Can we have a similar article for Outlook 365**



ServiceNow Administration Fundamentals (On Demand) – Xanadu

Course Overview

The *ServiceNow Administration Fundamentals* (On Demand – Xanadu) course provides a hands-on introduction to the core administration features of the ServiceNow platform. It focuses on configuration, data management, user interface customization, process automation, and service catalog management.

Objectives

- Understand the ServiceNow architecture and navigation.
- Learn how to manage users, groups, and roles.
- Customize forms, lists, and tables to meet organizational needs.
- Configure notifications, business rules, and access controls.
- Build and manage a service catalog.
- Implement workflows and automation using Flow Designer.

Practical Components

1. Instance Setup

- Accessed the ServiceNow *personal developer instance* via the ServiceNow Developer Portal.
- Navigated through the **Application Navigator** and explored various modules like *Incident*, *Problem*, *Change*, and *Service Catalog*.

2. User and Role Administration

- Created new **users**, **groups**, and assigned **roles** (e.g., itil, admin).
- Configured access permissions for specific modules.

3. Table and Form Configuration

- Created custom tables and added fields.
- Modified form layouts using **Form Designer**.
- Added mandatory and read-only attributes to fields.

4. Business Rules and Client Scripts

- Implemented **Business Rules** for data validation and automation.

- Used **Client Scripts** to control field visibility and behavior on forms.

5. Notifications and Email Configuration

- Configured email notifications for incident assignment and updates.
- Used **notification templates** and tested email triggers.

6. Service Catalog Management

- Created a **catalog item** (e.g., Laptop Request).
- Added **variables** such as model, RAM, accessories, and justification.
- Applied **UI policies** — for example, when “Additional Accessories” checkbox is selected, accessory details become visible and mandatory.

7. Workflow / Flow Designer

- Created a **Flow** using Flow Designer for item approval.
- Defined **trigger conditions, approval actions, and notifications**.

8. Reporting and Dashboards

- Created custom reports for incidents and requests.
- Designed a dashboard for the IT Service Desk to visualize metrics.

Key Learnings

- Hands-on experience with ServiceNow core modules and administrative tools.
- Gained knowledge of **data structure, security, and process automation**.
- Learned to design **catalog items** and implement **UI policies** effectively.
- Understood the importance of role-based access and workflow design.

Outcome

The course provided a comprehensive understanding of ServiceNow system administration. It helped in developing skills required to manage and configure a ServiceNow instance efficiently for real-world ITSM (IT Service Management) operations.

Conclusion

The *ServiceNow Administration Fundamentals (Xanadu)* practical strengthened foundational knowledge of ServiceNow administration. It enhanced practical proficiency in automating workflows, managing catalogs, and configuring instances — skills essential for platform administrators.

ITSM Fundamentals (On Demand) – ServiceNow University

Course Overview

The *IT Service Management (ITSM) Fundamentals On Demand* course from **ServiceNow University** introduces learners to the essential concepts, processes, and practical applications of IT Service Management using the ServiceNow platform.

The course focuses on managing IT services efficiently through modules like **Incident, Problem, Change, and Request Management**, with hands-on exercises in a ServiceNow instance.

Objectives

- Understand the core principles and processes of IT Service Management (ITSM).
- Learn to navigate the ServiceNow ITSM applications.
- Gain practical skills in **Incident, Problem, Change, and Request Management**.
- Apply ITIL best practices using ServiceNow workflows.
- Analyze service performance using dashboards and reports.

Practical Components

1. Introduction to ITSM

- Studied the **ITIL framework** and its alignment with ITSM practices.
- Understood how ServiceNow automates and supports ITIL processes.

2. Incident Management

- Created and managed **incident records** to restore normal service operations quickly.
- Assigned incidents to appropriate support groups and resolved them.
- Explored **incident states** such as *New, In Progress, On Hold, Resolved, and Closed*.

3. Problem Management

- Identified the **root cause** of recurring incidents.
- Created **problem records** and linked related incidents.
- Documented **workarounds** and permanent fixes to prevent future issues.

4. Change Management

- Submitted **change requests (CRs)** for system modifications.
- Followed the **Change Lifecycle**: *New → Assess → Authorize → Schedule → Implement → Review → Close*.

- Used **Change Models** and **CAB approvals** (Change Advisory Board) for risk management.

5. Request Management

- Accessed the **Service Catalog** to submit **service requests** (e.g., Laptop Request, Software Installation).
- Learned how requests move through **approval** and **fulfillment** stages.
- Applied **catalog item workflows** to automate fulfillment.

6. Configuration Management Database (CMDB)

- Explored the **CMDB structure**, including *Configuration Items (CIs)* and their relationships.
- Understood how CMDB supports Incident, Problem, and Change processes.

7. Reporting and Dashboards

- Generated **real-time reports** for open incidents, problems, and changes.
- Created **dashboards** to visualize KPIs like *MTTR (Mean Time to Resolve)* and *Service Availability*.

Key Learnings

- Learned how **ITSM processes integrate** for seamless IT operations.
- Understood **incident lifecycle management** and the importance of timely resolution.
- Gained hands-on experience in managing **change approvals** and risk assessment.
- Developed skills to use **reports and dashboards** for service performance analysis.
- Strengthened understanding of **ITIL-based best practices** through real-world scenarios.

Outcome

The *ITSM Fundamentals On Demand* course provided a comprehensive understanding of how ServiceNow enables effective IT service delivery.

By completing practical exercises, I gained confidence in handling ITSM modules, configuring workflows, and applying best practices for continuous service improvement.

Conclusion

The practical training in *ServiceNow ITSM Fundamentals* enhanced my administrative and analytical skills in IT Service Management.

It provided the foundation to manage incidents, problems, changes, and service requests efficiently while ensuring service quality and customer satisfaction.