

# 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

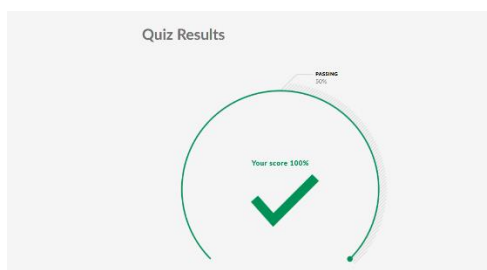
The "Welcome to ServiceNow" Course Overview knowledge check is associated with what you learned in the course overview.

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

- ServiceNow Website ([servicenow.com](https://servicenow.com))
- ServiceNow Product Documentation ([docs.servicenow.com](https://docs.servicenow.com))
- ServiceNow Community ([community.servicenow.com](https://community.servicenow.com))
- ServiceNow University ([learning.servicenow.com](https://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

**List Views and Personalization**

100% COMPLETE

List Views and Personalization ✓

Filters and Tags ✓

Now You Try: Lists and Filters ✓

Lists and Filters Knowledge Check ✓

**Table data displayed as lists**

Each row represents one record

Each column represents one field

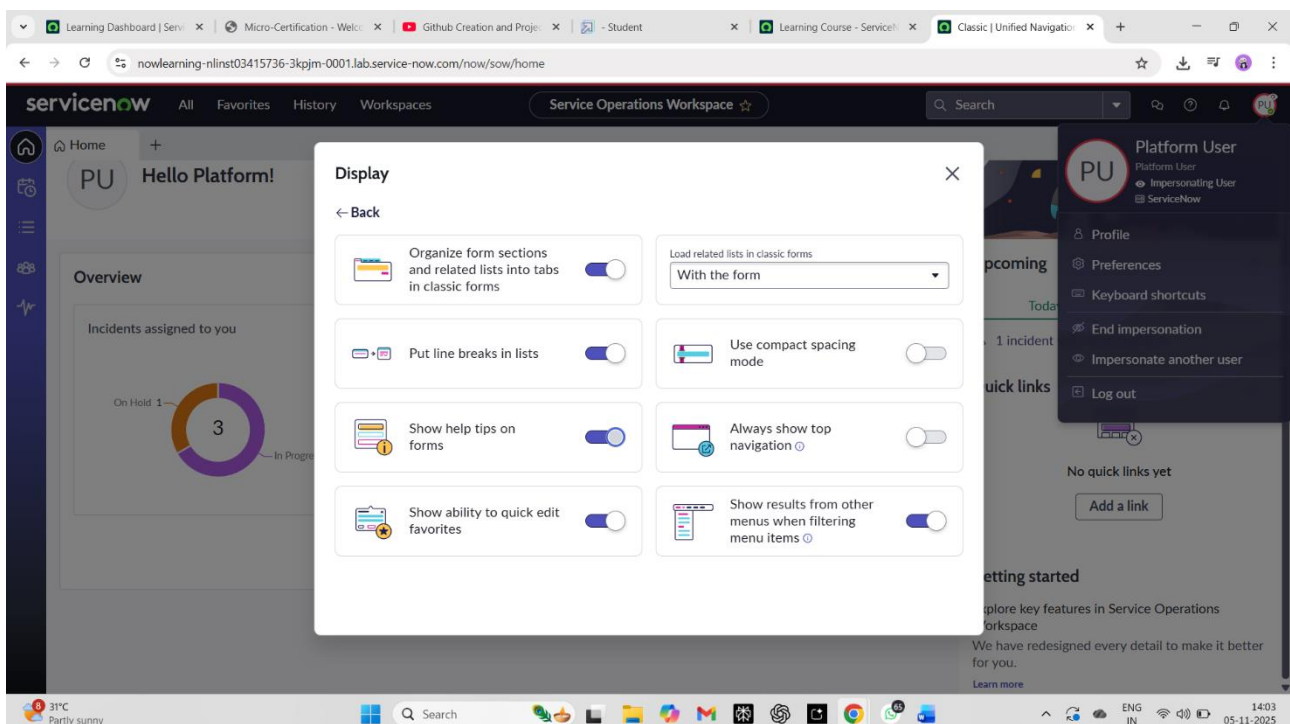
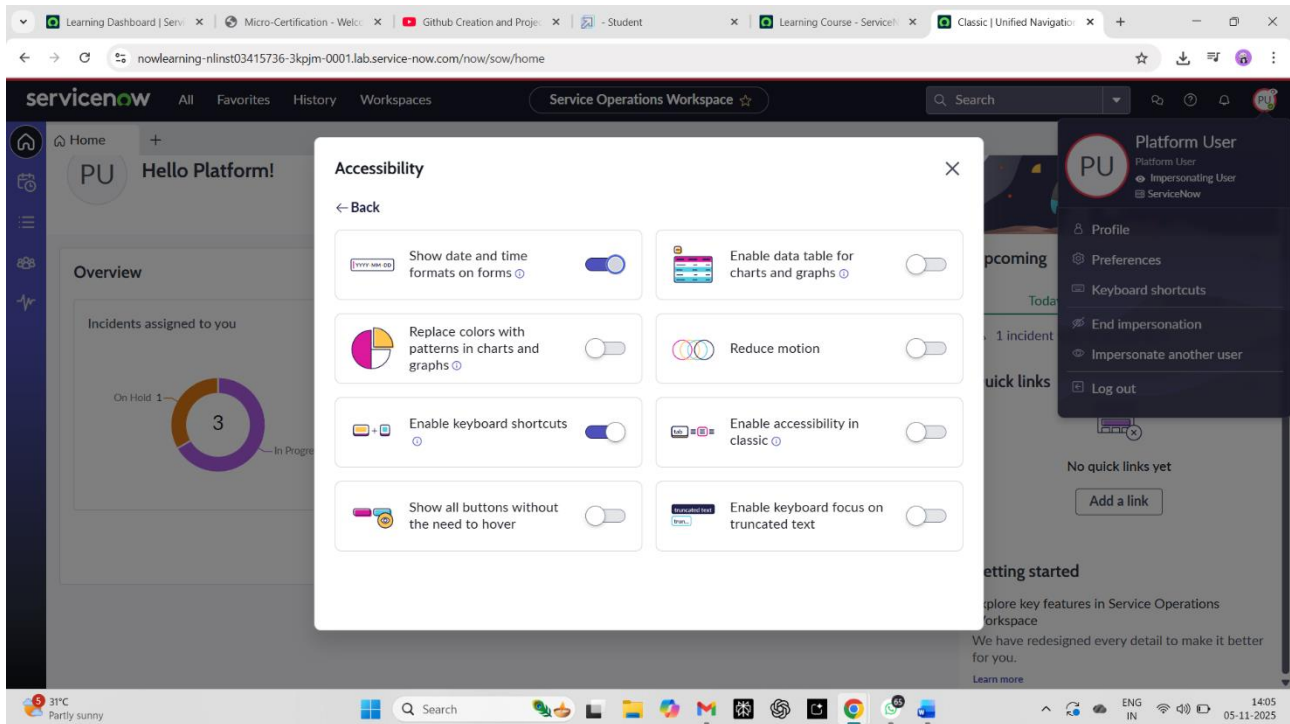
A list displays a set of records from a table. You can identify table data in the form of **rows** and **columns**. Each row represents one **record**. Each column represents one **field**.

Lists can be filtered and customized to display the information you need.

# 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**.



# 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 the ServiceNow Incidents list interface. The top navigation bar includes 'All', 'Favorites', 'History', and 'Workspaces'. The 'Incidents' tab is selected. A search bar is present. Below the navigation bar, there is a table of incidents. The table has columns: Number, Opened, Short description, Caller, Priority, State, Category, Assignment group, Assigned to, Updated, and Updated by. The table is filtered to show incidents where the 'Assigned to' field is empty and the 'Assignment group' is 'Service Desk'. The table contains 11 incidents. The first incident is INC0010008, opened on 2022-06-27, with the short description 'Cannot access playbook.' and caller 'Allyson Gillispie'. The priority is 5 - Planning, and the state is In Progress. The assignment group is Service Desk, and the assigned to field is empty. The updated date is 2022-06-27 16:11:42, and the updated by is admin. The last incident is INC008111, opened on 2019-07-22, with the short description 'ATF : Test1' and caller 'System Administrator'. The priority is 5 - Planning, and the state is New. The assignment group is Service Desk, and the assigned to field is empty. The updated date is 2019-07-22 14:08:00, and the updated by is admin. The bottom of the screen shows a Windows taskbar with various icons and a system tray with a rain warning 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 14:08:00	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 14:08:00	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.

	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
<input checked="" type="checkbox"/>	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 14:06:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 14:06:57	admin

## Assessment Simulator Task 4

### Create a Visual Task Board (VTB) from a List

#### Task Instructions:

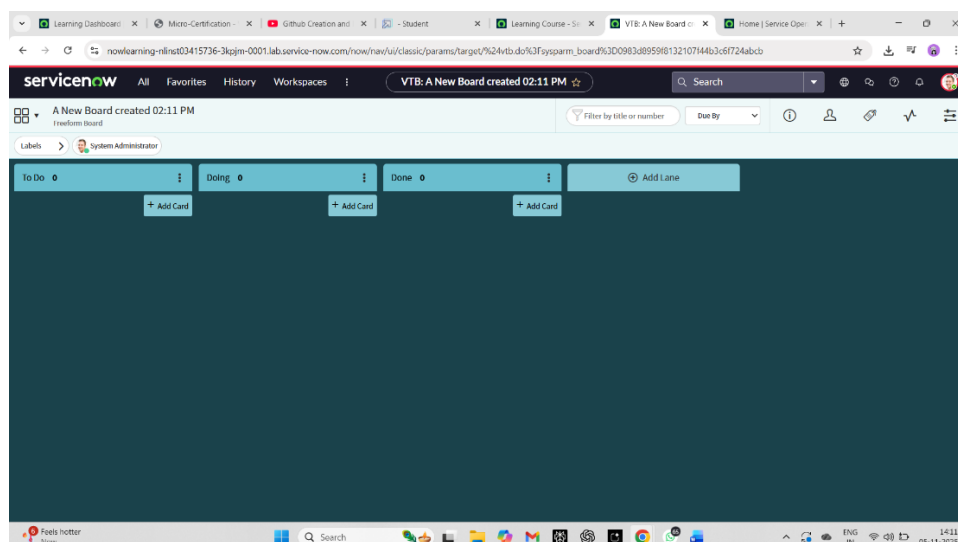
**NOTE:** This task validation is dependent on validating task 2. If you did not complete the “Favorite a Filtered List” activity, you will not be able to complete this activity.

#### 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.





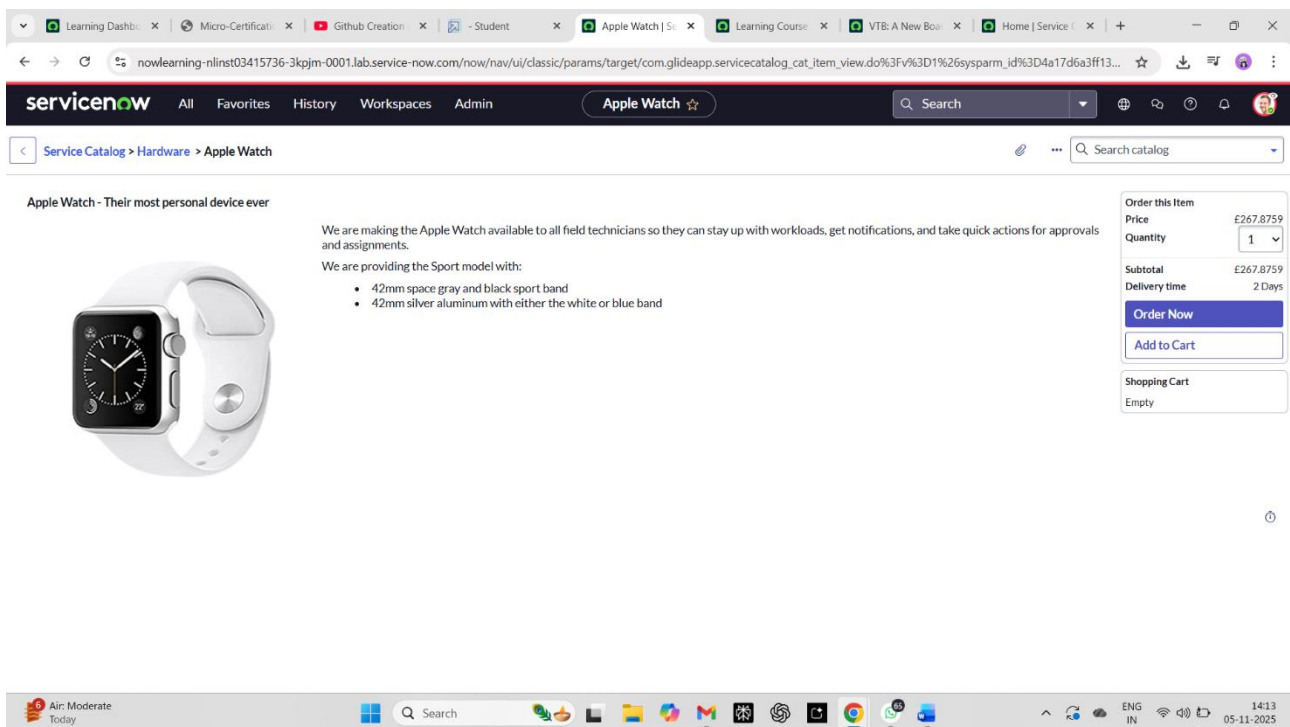
# Assessment Simulator Task 5

## 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 web browser window displaying the ServiceNow Service Catalog page for an Apple Watch. The browser's address bar shows the URL: `nowlearning-nlinst03415736-3kpbm-0001.lab.service-now.com/now/nav/ui/classic/params/target/com.glideapp.servicecatalog_cat_item_view.do%3Fv%3D1%26sysparm_id%3D4a17d6a3ff13...`. The ServiceNow header includes the logo, navigation links (All, Favorites, History, Workspaces, Admin), a search bar, and a breadcrumb trail: `Service Catalog > Hardware > Apple Watch`. The main content area features a large image of an Apple Watch on the left. To its right, text describes the product: "Apple Watch - Their most personal device ever" and "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." Below this, it states "We are providing the Sport model with:" followed by a bulleted list: "42mm space gray and black sport band" and "42mm silver aluminum with either the white or blue band". On the right side of the page, there is a summary box with the following details: "Order this Item", "Price: £267.8759", "Quantity: 1" (with a dropdown arrow), "Subtotal: £267.8759", and "Delivery time: 2 Days". Below this summary are two buttons: "Order Now" and "Add to Cart". At the bottom of the summary box, it says "Shopping Cart Empty". The Windows taskbar at the bottom of the screen shows the date and time as "14:13 05-11-2025" and the language as "ENG IN".

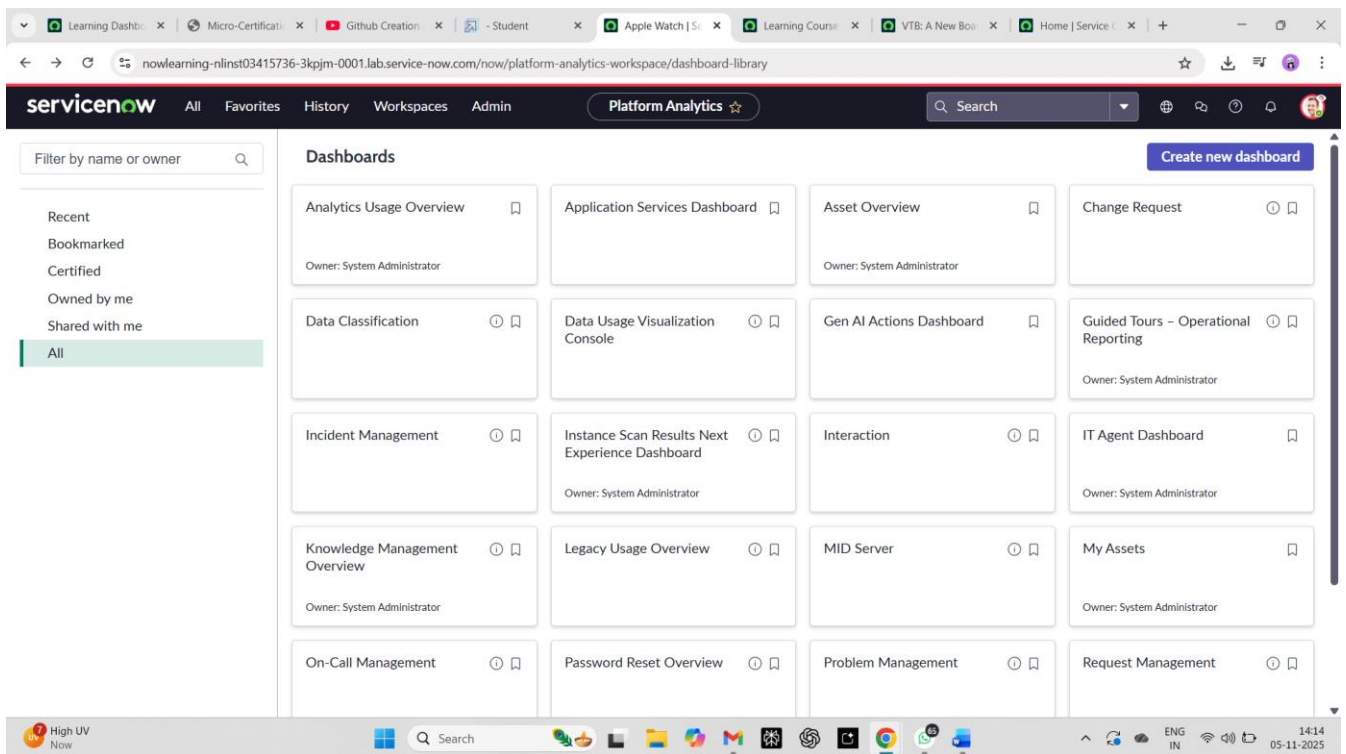
# Assessment Simulator Task 6

## 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.



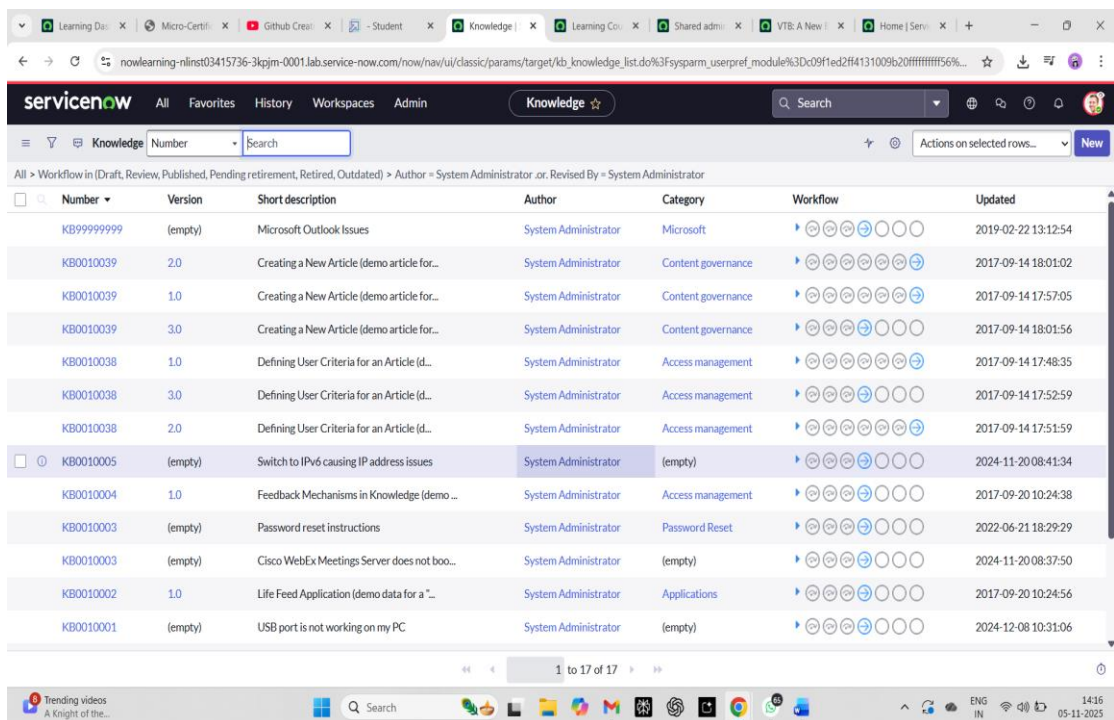
# Assessment Simulator Task 7

## 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**



	Number	Version	Short description	Author	Category	Workflow	Updated
	KB9999999	(empty)	Microsoft Outlook Issues	System Administrator	Microsoft	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2019-02-22 13:12:54
	KB0010039	2.0	Creating a New Article (demo article for...	System Administrator	Content governance	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 18:01:02
	KB0010039	1.0	Creating a New Article (demo article for...	System Administrator	Content governance	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 17:57:05
	KB0010039	3.0	Creating a New Article (demo article for...	System Administrator	Content governance	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 18:01:56
	KB0010038	1.0	Defining User Criteria for an Article (d...	System Administrator	Access management	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 17:48:35
	KB0010038	3.0	Defining User Criteria for an Article (d...	System Administrator	Access management	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 17:52:59
	KB0010038	2.0	Defining User Criteria for an Article (d...	System Administrator	Access management	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-14 17:51:59
<input checked="" type="checkbox"/>	KB0010005	(empty)	Switch to IPv6 causing IP address issues	System Administrator	(empty)	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2024-11-20 08:41:34
	KB0010004	1.0	Feedback Mechanisms in Knowledge (demo ...	System Administrator	Access management	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-20 10:24:38
	KB0010003	(empty)	Password reset instructions	System Administrator	Password Reset	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2022-06-21 18:29:29
	KB0010003	(empty)	Cisco WebEx Meetings Server does not boo...	System Administrator	(empty)	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2024-11-20 08:37:50
	KB0010002	1.0	Life Feed Application (demo data for a "...	System Administrator	Applications	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2017-09-20 10:24:56
	KB0010001	(empty)	USB port is not working on my PC	System Administrator	(empty)	▶ (empty) (empty) (empty) (empty) (empty) (empty)	2024-12-08 10:31:06

# 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.

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## 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.