

Working With Lists & Forms

Course Outline



1 Course Introduction

2 ServiceNow Overview

3 Working With Lists & Forms

4 Customizations

5 Tables & Fields

6 User Administration

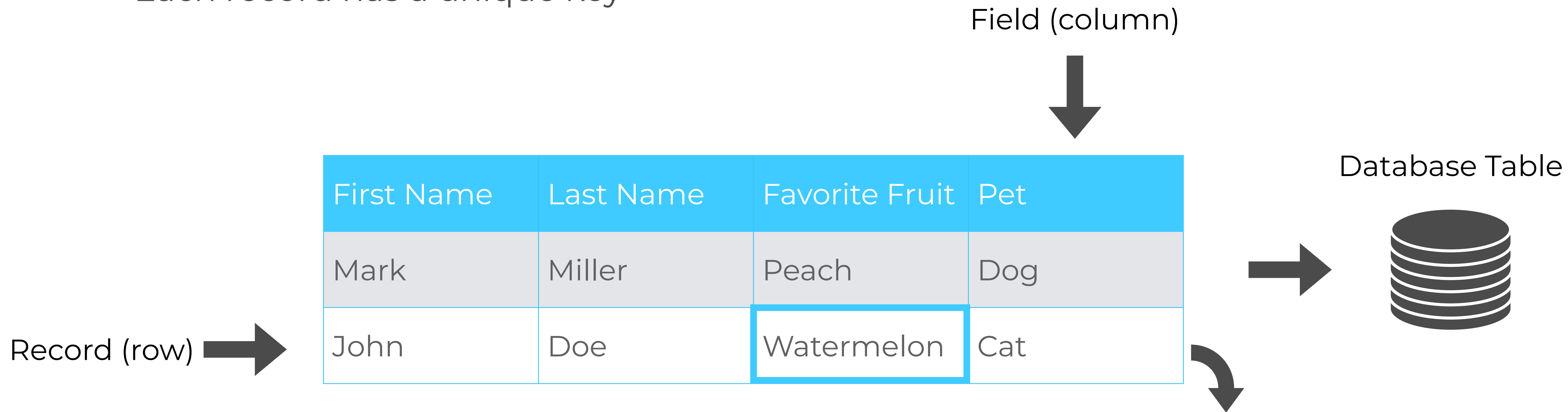
7 Core Applications

8 System Administration

9 Building A Custom App

Records

- A row in a spreadsheet
- A single entity
- Each record has a unique key



sys_id=ef4225a40a0a0b5700d0b8a790747812

Lists & Forms

Incidents New Search Number Search								
All								
		Number	Opened	Short description	Caller	Priority	State	Category
<input type="checkbox"/>	i	INC0010112	2019-07-29 11:48:43	Assessment : ATF Assessor	survey_user	5 - Planning	New	Inquiry / Help
<input type="checkbox"/>	i	INC0010111	2019-07-22 14:04:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help
<input type="checkbox"/>	i	INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help
<input type="checkbox"/>	i	INC0009005	2018-08-31 21:35:21	Email server is down.	David Miller	1 - Critical	New	Software
<input type="checkbox"/>	i	INC0009004	2018-09-01 06:13:30	Defect tracking tool is down.	David Miller	3 - Moderate	Closed	Software
<input type="checkbox"/>	i	INC0009003	2018-08-30 02:17:32	Cannot sign into the company portal app	David Miller	3 - Moderate	Closed	Inquiry / Help
<input type="checkbox"/>	i	INC0009002	2018-09-16 05:49:23	My computer is not detecting the headphone device	David Miller	3 - Moderate	Closed	Hardware

- Multiple records per page
- Limited fields
- Filter and sort records
- Multi-select
- Cell

<

Incident INC0000060

Follow

Update

Delete

↑

↓

Number

INC0000060

Contact type

Self-service

* Caller

Joe Employee

State

Closed

Category

Inquiry / Help

Impact

2 - Medium

Subcategory

Email

Urgency

2 - Medium

Business service

Email

Priority

3 - Moderate

Configuration item

Storage Area Network 001

Assignment group

Network

Assigned to

David Loo

* Short description

Unable to connect to email

Description

I am unable to connect to the email server. It appears to be down.

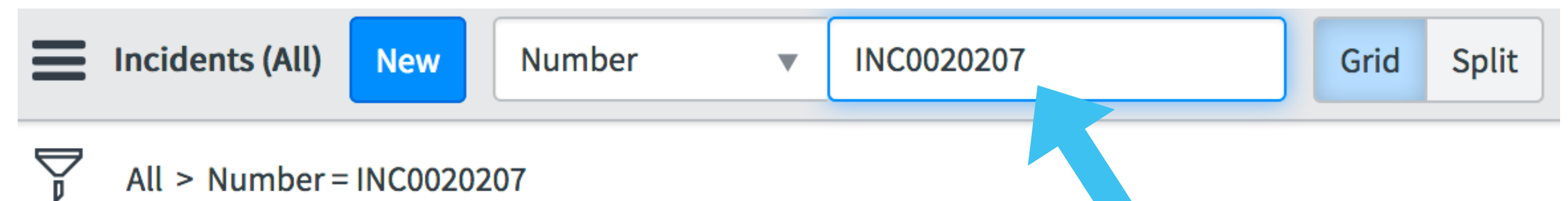
- 1 record per page
- More fields
- Editing record information
- More control

Lists & Forms

Demo

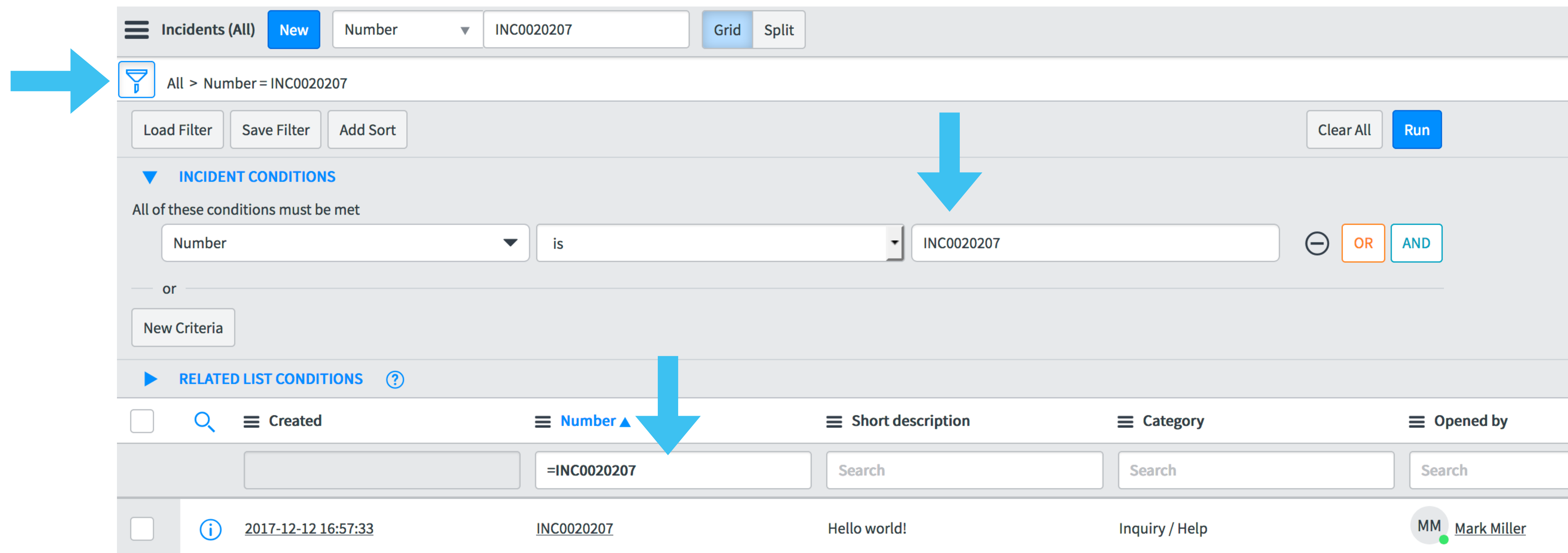
Filters & Search

- Many search bars
- Similar search functions
- Search wildcards



Incidents (All) New Number INC0020207 Grid Split

Funnel icon All > Number = INC0020207



Incidents (All) New Number INC0020207 Grid Split

Funnel icon All > Number = INC0020207

Load Filter Save Filter Add Sort Clear All Run

INCIDENT CONDITIONS

All of these conditions must be met

Number is INC0020207 - OR AND

or

New Criteria

RELATED LIST CONDITIONS ?

	Created	Number	Short description	Category	Opened by
<input type="checkbox"/>		<input type="text" value="=INC0020207"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>	<input type="text" value="Search"/>
<input type="checkbox"/>	2017-12-12 16:57:33	INC0020207	Hello world!	Inquiry / Help	MM Mark Miller

Search Conditions

Wildcard Syntax	Search Criteria	Example
*[term]	contains	*Mark
!*[term]	does not contain	!*Mark
= [term]	equals	=Miller
!= [term]	does not equal	!=Miller
[term]%	starts with	Hello%
%[term]	ends with	%goodbye

Filters & Search

Demo

Condition Builder

- Very powerful
- Replaces SQL statements
- Access related fields
- Save condition
- Copy condition
- Field, Operator, Value

Incidents **New** Search Number Search

All > Number starts with INC00 > Active = true > or Caller = David Miller

Run Save... AND OR Add Sort

All of these conditions must be met

Number starts with INC00 AND Active is true

OR all of these conditions must be met

Caller is David Miller

Number

Opened

Short description

Caller

Priority

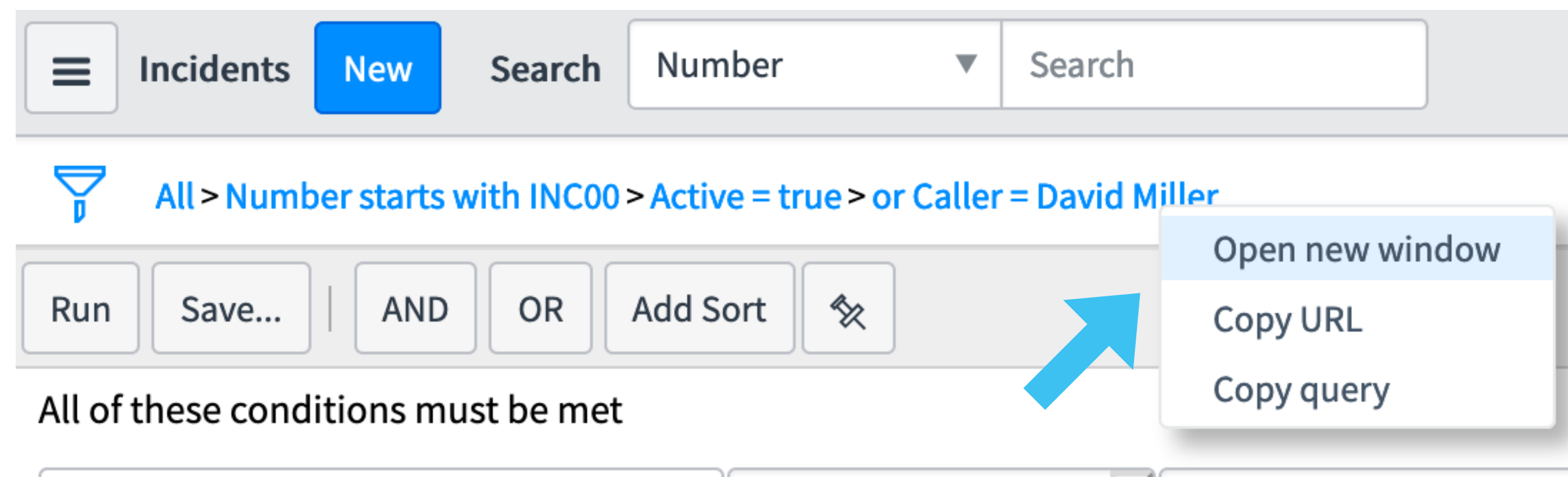
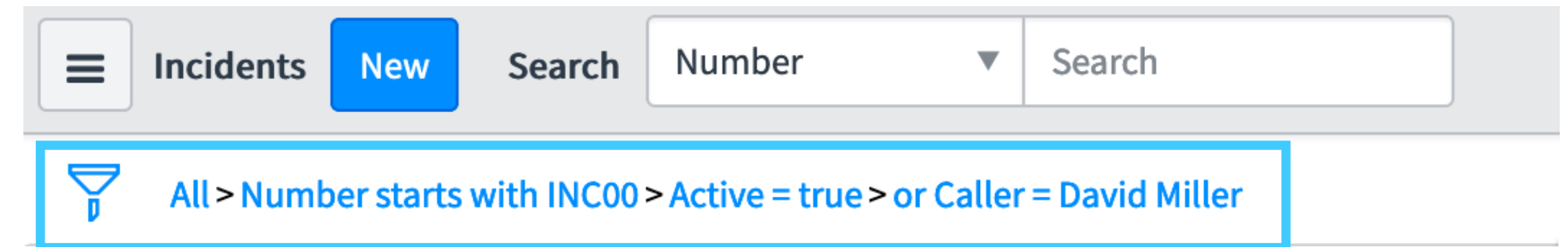
State

Category

<input type="checkbox"/>	i	INC0010112	2019-07-29 11:48:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help
<input type="checkbox"/>	i	INC0010111	2019-07-22 14:04:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help
<input type="checkbox"/>	i	INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help

Breadcrumbs

- Dynamic
- Remove a filter by clicking on “>”
- Copy query or URL

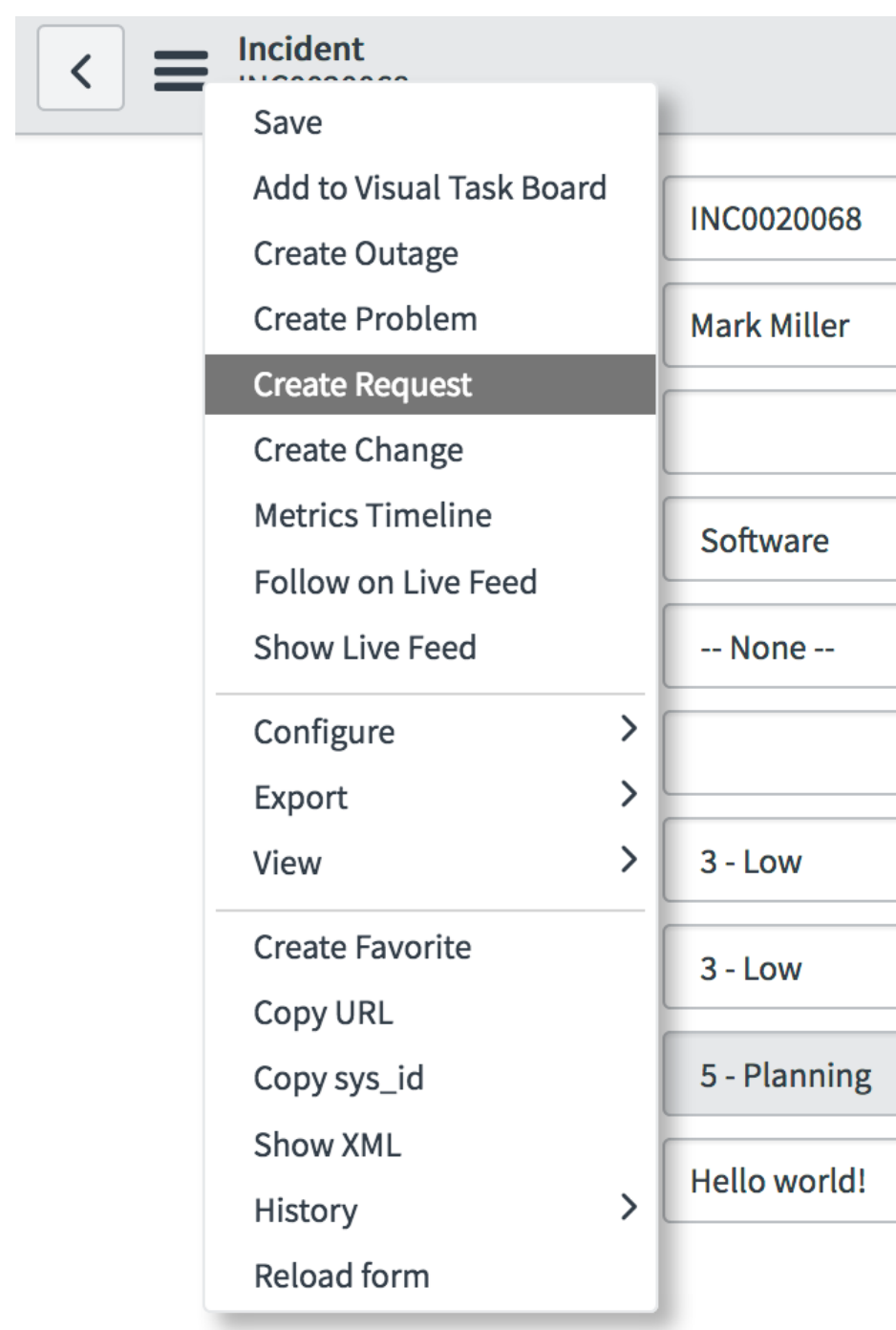


Condition Builder & Breadcrumbs

Demo

Context Menus

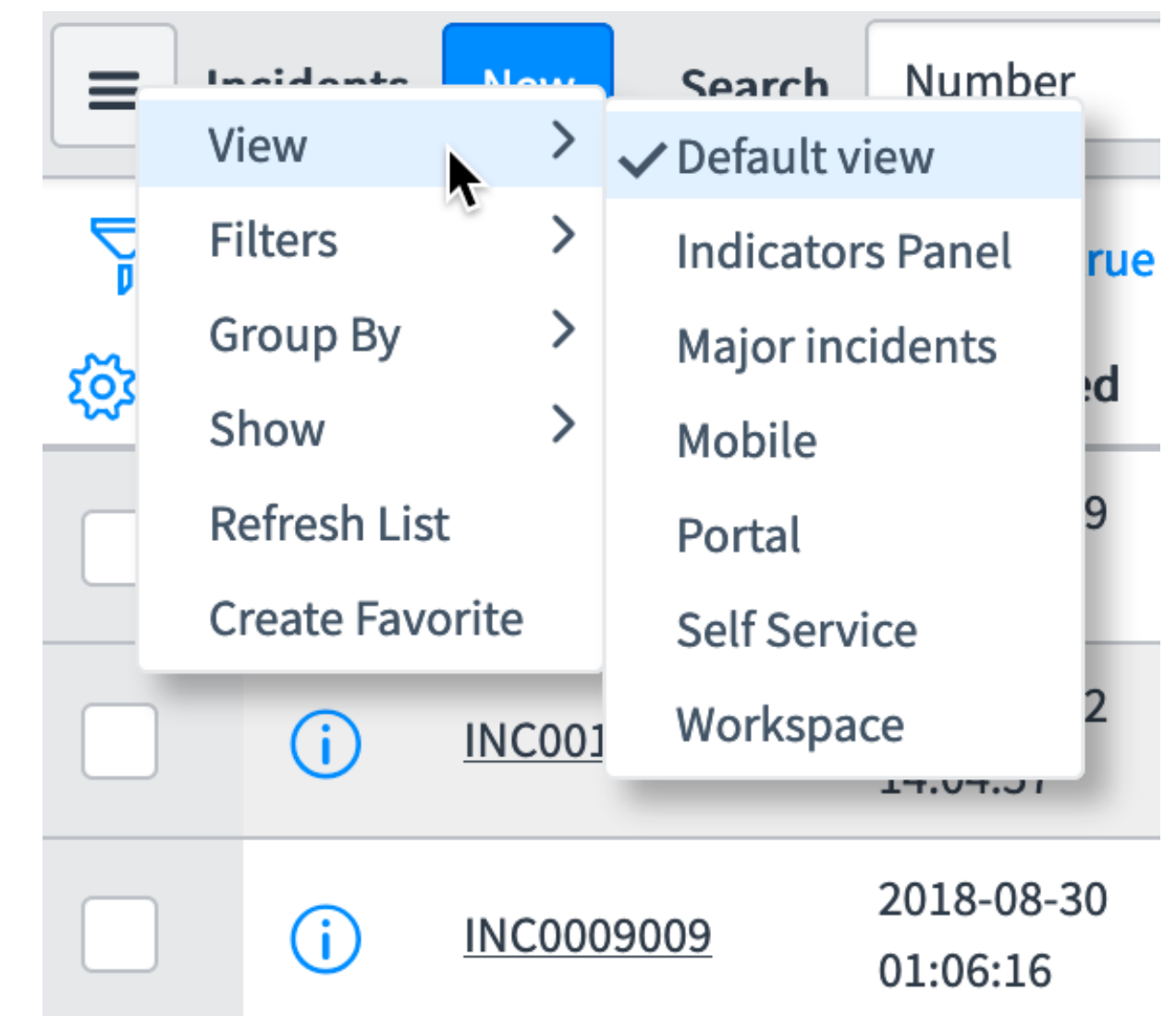
- Appear in list & form views
- Menus with different options
- Application look-and-feel



Caller	Priority	State
survey user	5 - Planning	New
System Administrator	5 - Planning	New
er. David Miller		
David Miller		
David Miller		
David Miller		
David Miller		
David Miller		
David Miller	3 - Moderate	New

00> Active = true> or Caller = David Miller

Opened	Short description	Caller
2019-07-29 11:48:43	A	survey use
2019-07-22 14:04:57	A	System Administrator
2018-08-30 01:06:16	U	David Miller
2018-08-31 21:35:21	E	David Miller
2018-09-01 06:13:30	D	David Miller
2018-08-30 02:17:32	C	David Miller
2018-09-16 05:49:23	M	David Miller
2018-09-11 20:56:26	U	David Miller
2018-10-16 22:47:51	Need access to the common drive.	David Miller



Context Menus


Demo



Businessman Bob



Admin
Adam

- 

		Incidents	New	Search	Number	▼	Search
		All > Number starts with INC00 > Active = true > or Caller = David Miller					
					≡ Number ▼	≡ Opened	≡ Short description
					INC0010112	2019-07-29 11:48:43	Assessment : ATF Assessor
					INC0010111	2019-07-22 14:04:57	ATF : Test1
					INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.

Incidents

New

Search

Number

Search

All > Number starts with INC00 > Active = true > or Caller = David Miller

Number

Opened

Short description

<div></div>	<div></div>	<div>INC0010112</div>	<div>2019-07-29 11:48:43</div>	<div>Assessment : ...</div>
<div></div>	<div></div>	<div>INC0010111</div>	<div>2019-07-22 14:04:57</div>	<div>ATF : Test1</div>
<div></div>	<div></div>	<div>INC0009009</div>	<div>2018-08-30 01:06:16</div>	<div>Unable to acc...</div>
<div></div>	<div></div>	<div>INC0009005</div>	<div>2018-08-31 21:35:21</div>	<div>Email server i...</div>
<div></div>	<div></div>	<div>INC0009004</div>	<div>2018-09-01 06:13:30</div>	<div>Defect trackin...</div>
<div></div>	<div></div>	<div>INC0009003</div>	<div>2018-08-30 02:17:32</div>	<div>Cannot sign in portal app</div>
<div></div>	<div></div>	<div>INC0009002</div>	<div>2018-09-16 05:49:23</div>	<div>My computer headphone d...</div>
<div></div>	<div></div>	<div>INC0009001</div>	<div>2018-09-11 20:56:26</div>	<div>Unable to pos page</div>
<div></div>	<div></div>	<div>INC0007002</div>	<div>2018-10-16 22:47:51</div>	<div>Need access t...</div>
<div></div>	<div></div>	<div>INC0007001</div>	<div>2018-10-16 22:47:10</div>	<div>Employee payroll application server is down</div>

Personalize List Columns

Available

Selected

Active

Activity due

Actual end

Actual start

Additional assignee list

Additional comments

Approval

Approval history

Approval set

Business duration

Business resolve time

Caused by Change

Change Request

Child Incidents

Closed

Closed by

Comments and Work notes

Number

Opened

Short description

Caller

Priority

State

Category

Assignment group

Assigned to

Updated

Updated by

>

<

☒ Wrap column text

☐ Compact rows

☐ Active row highlighting

☒ Modern cell coloring

☒ Enable list edit

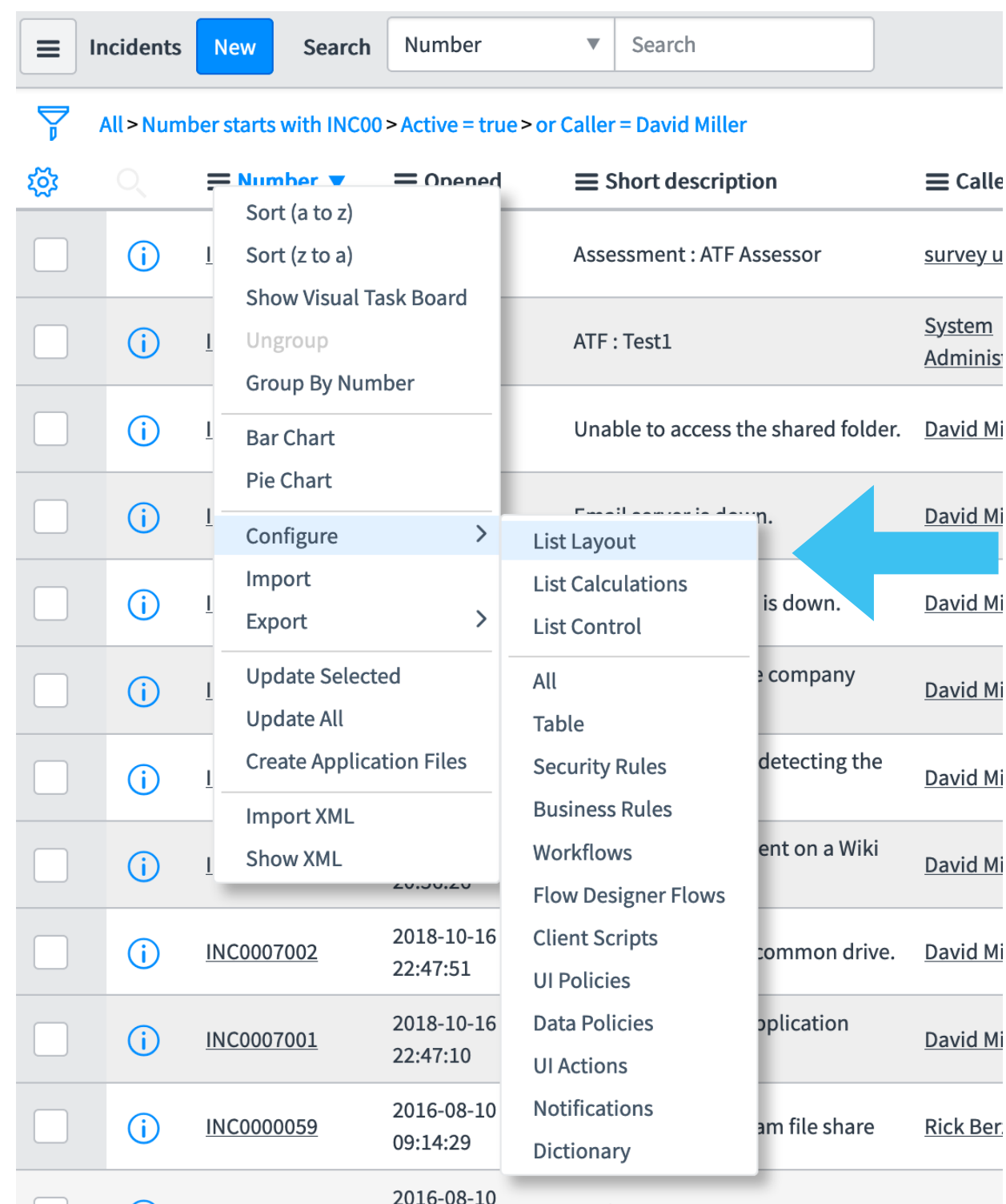
☒ Double click to edit

Cancel

OK

Configuring Lists

- Different than gear icon
- System wide
- Permissions



Available

Active
Activity due
Additional assignee list
Additional comments
Alternate ID
Approval
Approval history
Approval set
Assigned to [+]
Assignment group [+]
Business duration
Business resolve time
Business service [+]
Caller [+]
Caused by Change [+]
Change Request [+]
Child Incidents

Selected

Number
Caller.First name
Category
Short description
Opened by
Urgency



Cancel

Save

List view

View name

Default view

Create new field

Name

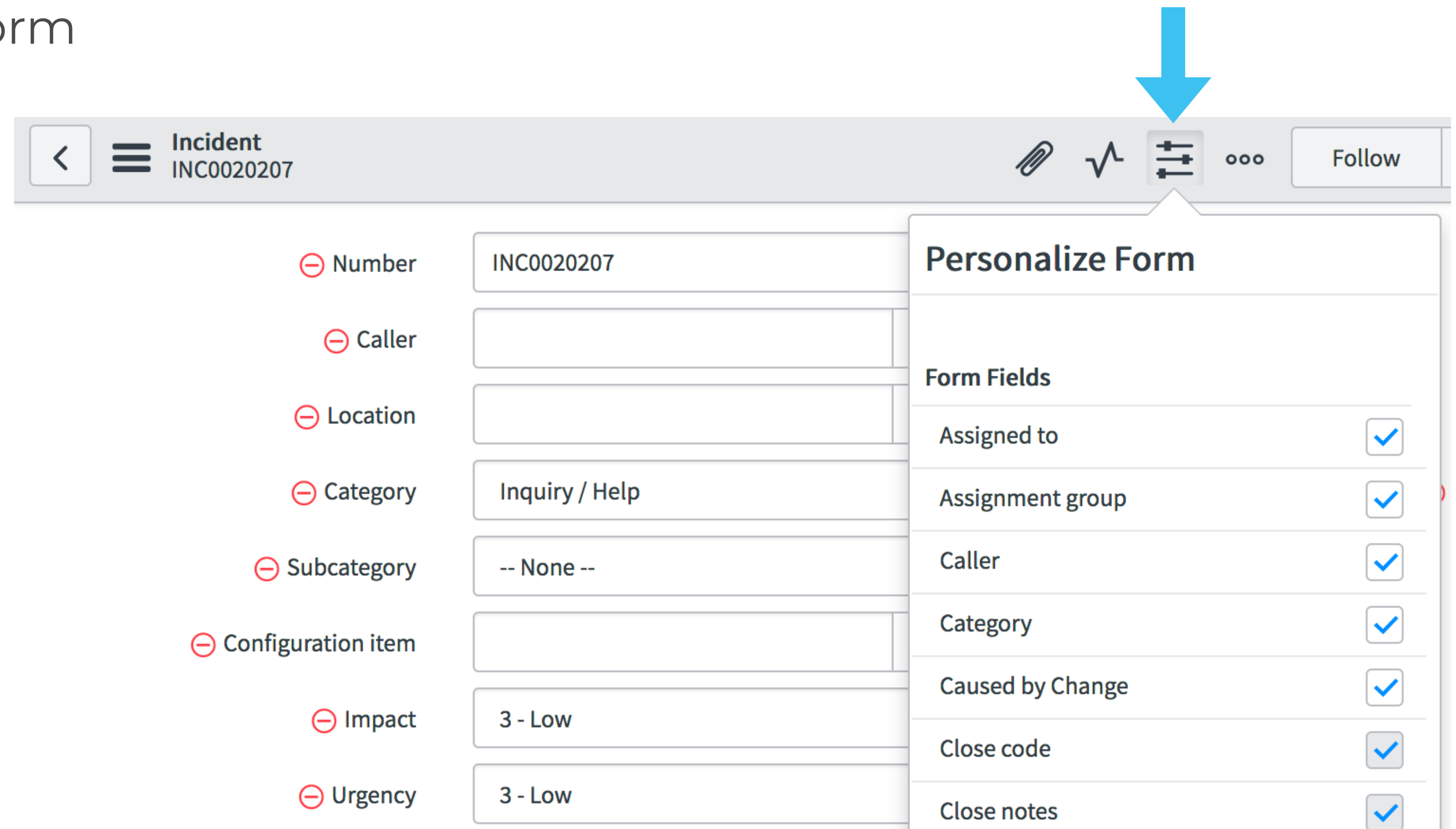
Type

Field length

Add

Personalizing Forms

- Adjustment icon on form
- User specific



The screenshot shows an incident form for 'Incident INC0020207'. The form has a header bar with navigation icons and a 'Follow' button. A blue arrow points to the adjustment icon (three horizontal lines with arrows) in the header. A dropdown menu titled 'Personalize Form' is open, showing a list of form fields with checkboxes indicating whether they are visible to the user.

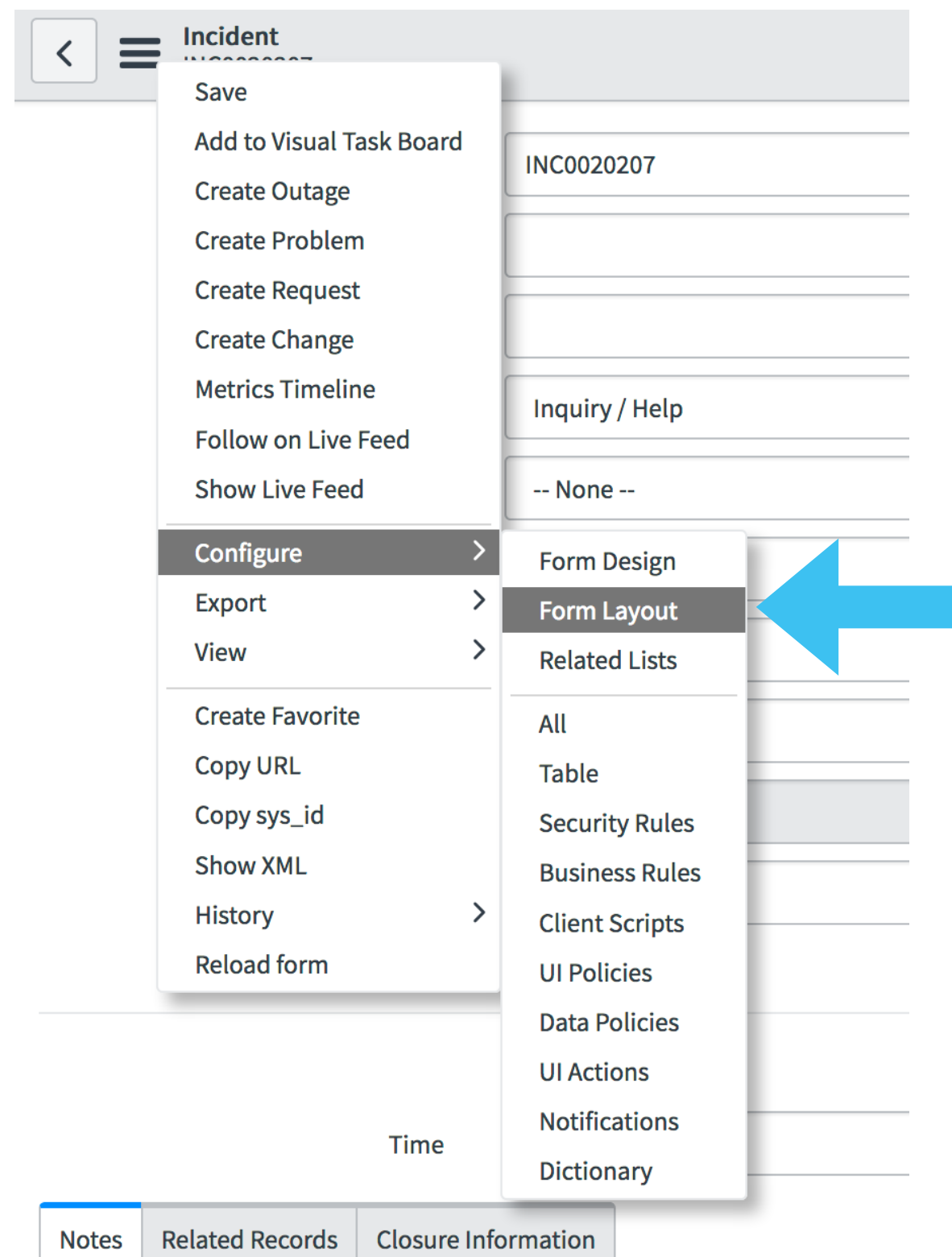
Field	Visible
Assigned to	<input checked="" type="checkbox"/>
Assignment group	<input checked="" type="checkbox"/>
Caller	<input checked="" type="checkbox"/>
Category	<input checked="" type="checkbox"/>
Caused by Change	<input checked="" type="checkbox"/>
Close code	<input checked="" type="checkbox"/>
Close notes	<input checked="" type="checkbox"/>

The form fields and their current values are:

- Number: INC0020207
- Caller: (empty)
- Location: (empty)
- Category: Inquiry / Help
- Subcategory: -- None --
- Configuration item: (empty)
- Impact: 3 - Low
- Urgency: 3 - Low

Configuring Forms

- Add/remove fields on form
- Split option
- Related fields



Available

Active
Activity due
Additional assignee list
Additional comments
Alternate ID
Approval
Approval history
Approval set
Assigned to [+]
Assignment group [+]
Business duration
Business resolve time
Business service [+]
Caller [+]
Caused by Change [+]
Change Request [+]
Child Incidents



Cancel

Save

Selected

Number
Caller
Location
Category
Subcategory
Configuration item
Impact
Urgency
Priority
|- split -|
Opened by
Contact type
State
Assignment group
Assigned to
|- end_split -|
Short description



Form view and section

View name

Default view

Section

Incident
Notes
Related Records
Closure Information



Create new field

Name

Type

Field length

String

Small (40)

Add

Modifying Lists & Forms

Demo