

## Week\_1 - ServiceNow – Hands \_ On

### TOPIC : 6

#### Forms in Service Now :

Forms in ServiceNow, The Standard Layout, Form Field Types, Saving Changes, Insert / Insert & Stay, Form Sections, Related Lists & Formatters, Form Views, Form Personalization, Adding Attachments, Form Templates, Creating & Editing Views



A form in ServiceNow is a common set of tools and user-interface elements used to view and update a single record from the database.

Two screenshots of ServiceNow forms. The left one is titled "Incident Record" and shows fields for Number, Caller, Category, Subcategory, Service, Service offering, Configuration item, Channel, State, Impact, Urgency, Priority, Assignment group, and Assignee. The right one is titled "User Record" and shows fields for User ID, First name, Last name, Title, Department, Personal email address, Email, Language, Calendar integration, Time zone, Date format, Business phone, and Mobile phone.

Topic is Forms, a critical component of the application's user-interface. Any time you are viewing, editing, or creating a single record in ServiceNow, you are working with a form. The lesson prepares us for the CSA Certification exam by focusing on the commonalities that exist between all ServiceNow forms including field types, standard components, saving changes, copying records, sections, related-lists, formatters, views, templates, attachments, and personalization. I took really good notes! In this series of videos, I'm reteaching all I learned from that course with a hard focus on keeping things as SIMPLE as possible.

A screenshot of the "Incident - INC0009005" form in ServiceNow. Annotations with arrows point to various parts: "Header Bar" points to the top navigation bar; "Required" points to the "Short description" field which has a red asterisk; "Fields" points to the "Channel" dropdown; and "Read-only" points to the "Priority" field which is highlighted in blue.

**Forms in ServiceNow:** A form in ServiceNow is a graphical user interface that displays fields from one record, allowing users to view and edit the record data. The form is the primary interface for users to interact with records in ServiceNow.

**The Standard Layout:** The standard layout is the default layout for forms in ServiceNow. It consists of a header, a body, and a footer. The header contains the form title and breadcrumbs, the body contains the form fields, and the footer contains the form buttons.

**Form Field Types:** There are several types of form fields in ServiceNow, including:

- **Text:** A single-line text field

- **Textarea:** A multi-line text field
- **Checkbox:** A checkbox field
- **Select:** A dropdown list field
- **Date:** A date field
- **DateTime:** A date and time field
- **Integer:** An integer field
- **Decimal:** A decimal field
- **Reference:** A reference field that links to another record

**Saving Changes:** When a user makes changes to a form, they can save their changes by clicking the **Update** button. The changes are then saved to the record.

**Insert / Insert & Stay:** When a user creates a new record, they can click the **Insert** button to save the record and return to the list of records. Alternatively, they can click the **Insert & Stay** button to save the record and remain on the form.

**Form Sections:** Form sections are used to organize form fields into logical groups. Sections can be collapsed or expanded to show or hide the fields within.

**Related Lists & Formatters:** Related lists are used to display a list of records related to the current record. Formatters are used to customize the display of related lists.

**Form Views:** Form views are used to customize the display of a form for different users or scenarios. For example, a form view can be created to display only certain fields for a specific user role.

**Form Personalization:** Form personalization allows users to customize the layout and fields of a form to suit their individual needs.

**Adding Attachments:** Attachments can be added to a form to store files related to the record.

**Form Templates:** Form templates are used to create a standard layout and design for forms. Templates can be applied to multiple forms to ensure consistency.

**Creating & Editing Views:** Views are used to customize the display of a form for different users or scenarios. Creating and editing views allows administrators to customize the form display for different use cases.

## Creating & Editing Form Views

Two tools exist for creating and managing form views, both available from the form context menu.

A screenshot of the ServiceNow incident form for incident INC0009009. The form is displayed in a web browser interface. At the top, there is a navigation bar with 'servicenow' logo, 'All', 'Favorites', 'History', 'Workspaces', and a search bar. Below the navigation bar, the incident number 'INC0009009' is displayed. The form is divided into two main sections: 'Incident Information' on the left and 'Incident Details' on the right. The 'Incident Information' section includes fields for 'Number' (INC0009009), 'Caller' (David Miller), 'Category' (Inquiry / Help), 'Subcategory' (-- None --), 'Service', 'Service offering', and 'Configuration item'. The 'Incident Details' section includes fields for 'Channel' (-- None --), 'State' (New), 'Impact' (3 - Low), 'Urgency' (2 - Medium), 'Priority' (4 - Low), 'Assignment group', and 'Assigned to'. Below these sections, there is a 'Short description' field with the text 'Unable to access the shared folder.' and a 'Description' field with the text 'Unable to access the shared folder. Please provide access.' At the bottom of the form, there is a 'Related Search Results' button.