ServiceNow

Week – 3

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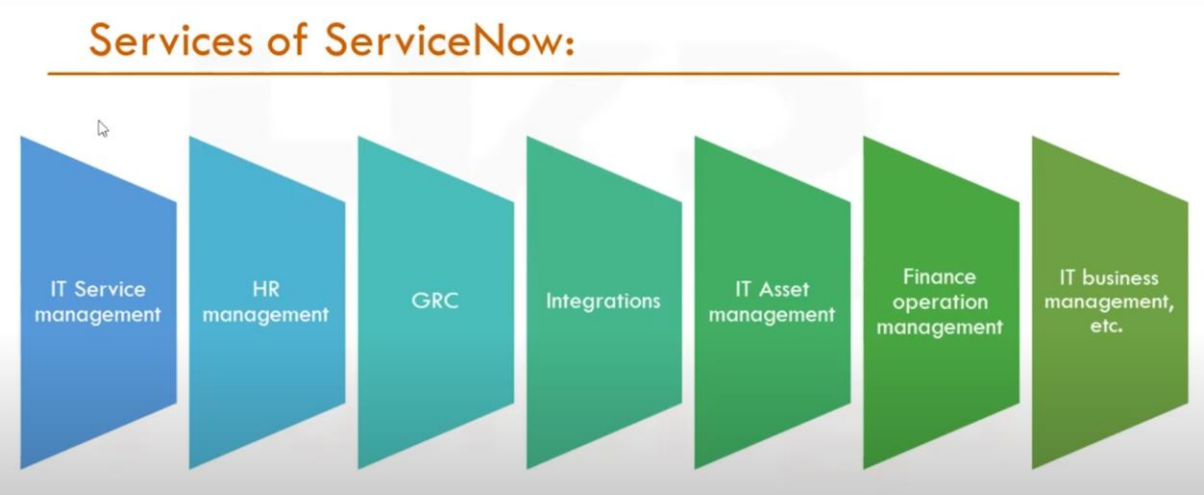
What is ServiceNow?

- ➔ ServiceNow is a cloud-based platform which provides infrastructure that is needed to develop, run and manage applications. ServiceNow provides Application product as a service (APaaS).

- ➔ Where organizations can create their own application in the ServiceNow platform and ServiceNow will automatically host the application, without writing a single line of code we can develop our desired application or workflow.

- ➔ Organizations can automate different business processes using ServiceNow platform and increasing their speed of delivery.



➔ **IT Service Management (ITSM):** ServiceNow provides comprehensive tools for managing IT services, ensuring seamless delivery and support. Includes features for incident management, problem management, change management, and service request management.

➔ **HR Management**: Provides solutions for automating and streamlining HR processes. Ensures better employee experience by managing employee onboarding, offboarding, case management, and self-service portals.

➔ **Governance, Risk, and Compliance (GRC)**: Helps organizations manage their governance, risk, and compliance processes. Automates risk assessment, policy management, and audit tracking to ensure regulatory compliance.

➔ **Integrations**: ServiceNow integrates with a variety of third-party systems to ensure smooth workflow across platforms. Enables data sharing, workflow automation, and connectivity with various tools like ERP, CRM, and IT tools.

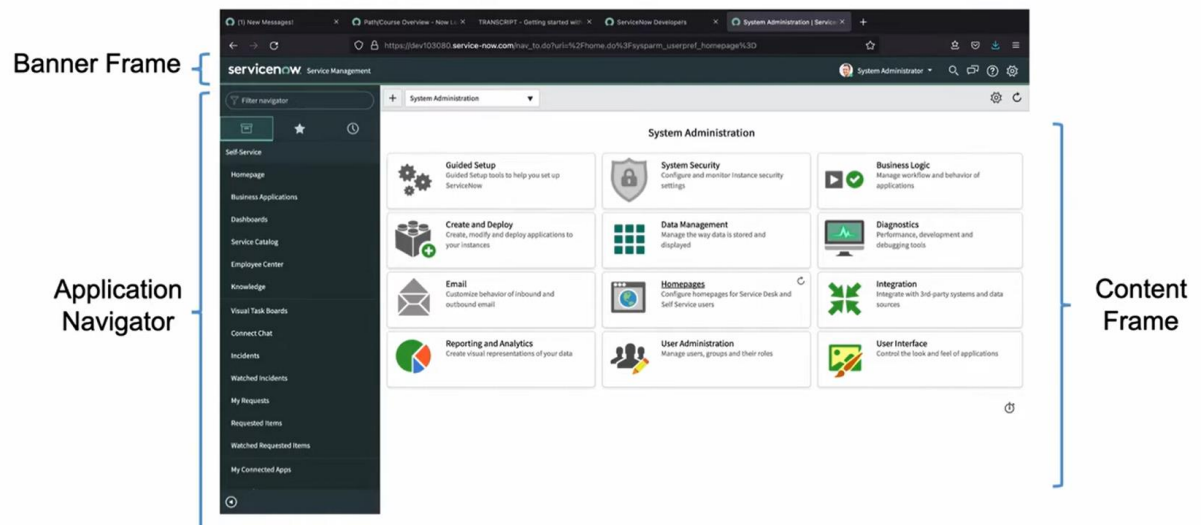
➔ **IT Asset Management**: Helps manage and track the lifecycle of IT assets, from procurement to retirement. Optimizes asset usage, reduces costs, and improves inventory management.

➔ **Finance Operation Management**: Manages financial operations with automated processes for handling finance-related tasks. Supports budgeting, forecasting, financial reporting, and compliance tracking.

➔ **IT Business Management**: Focuses on aligning IT initiatives with business goals. Includes tools for managing portfolios, projects, and resources to improve decision-making and optimize investments.

➔ GRC and Finance Operation Management are mainly used by banks, which provide banking services.

➔ To get free ServiceNow instances, just creating a ServiceNow developer account will give you a free instance.



➔ This is how ServiceNow UI looks.

➔ **Banner Frame**: Located at the top of the interface. It contains navigation and settings icons, often used for accessing user settings, notifications, and search functionality. Provides access to your profile, system information, and other system-wide controls.

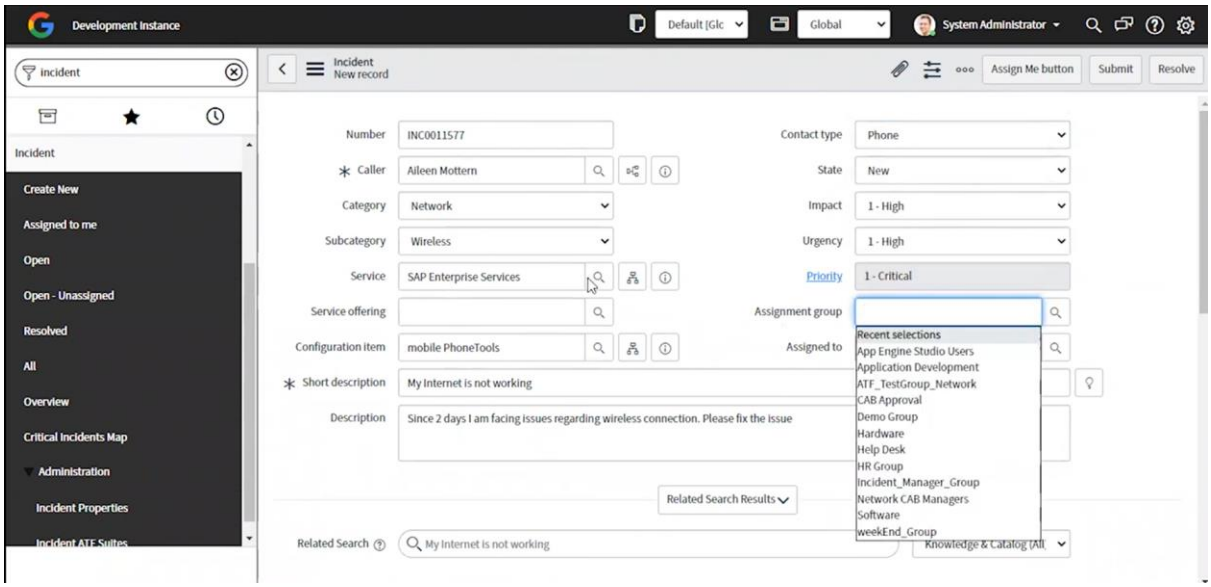
➔ **Application Navigator**: Located on the left-hand side of the interface. This is where users can access different modules and applications available in ServiceNow. It includes commonly used items like Self Service, Business Applications, Service Catalog, Incidents, Knowledge, Dashboards, etc.

➔ We also have favorites and history in ServiceNow. By marking items as favorites, users can quickly access them without searching every time. It allows users to save frequently accessed applications, modules, or specific records.

➔ The **History** section helps users quickly access previously visited applications or modules. It maintains a record of recent activity within ServiceNow, listing the most recently opened items such as records, forms, and tasks.

➔ **Content Frame**: Located in the middle/right section of the screen. Displays the main content and details related to the selected application or module from the Application Navigator.

➔ An incident is essentially any event that disrupts normal service operations, causing inconvenience or impacting business processes.



➔ **Incident Workflow:** The incident workflow typically starts when an issue is reported by a user. The incident is logged in the system, categorized, and prioritized based on the urgency and impact. It is then assigned to an appropriate team or individual for resolution.

➔ For example, a user has created a new incident where he is facing issues with network. So user has to fill all the fields describing about his problem and assign it to a suitable team or group or users who can resolve this problem.

➔ The user also has to mention impact, urgency and priority. Most importantly a short description must be provided so that the group which is resolving this problem might get a better understanding.

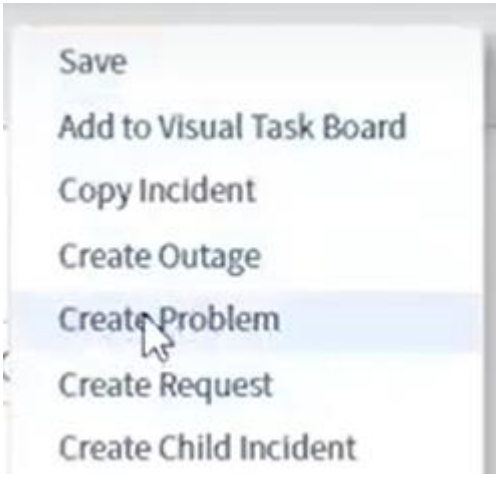
➔ Now the group will look into your problem. First, they'll change the state from new to in progress. After resolving they'll also provide resolution notes.

➔ After resolving they change the state from in progress to Resolved. User will receive all the notifications that's happening around. Users receive multiple emails while the resolution process is going on.

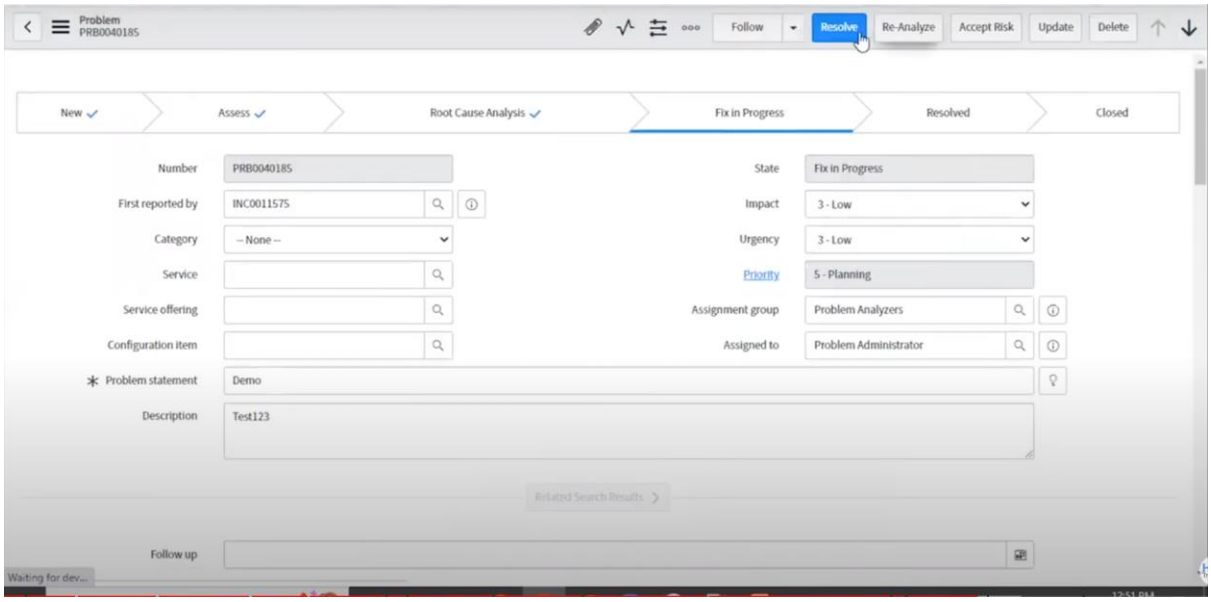
➔ First when the resolution team changes the state, user will get notified that team started working on problem. After resolving another email stating that 'your incident (number) has been solved.

➔ When a particular incident is causing you the same problem again and again then user can make it as a problem.

➔ To make an incident as a problem, just right click and select create problem button, problem form will be displayed.



➔ The primary objective of problem management is to prevent incidents from occurring and to minimize the impact of incidents that cannot be prevented.



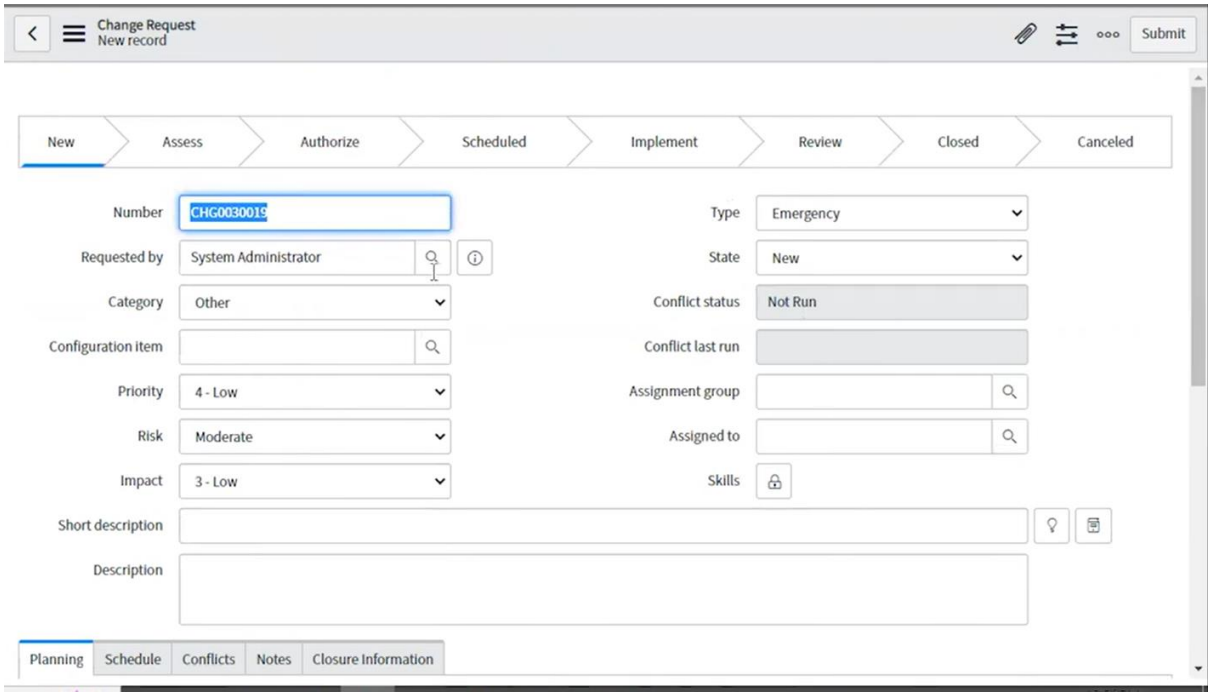
➔ This image illustrates a **Problem Record** in ServiceNow, showing different fields and stages of the problem management process.

➔ There are several workflow phases in the problem management process. They are new, where it'll be created. Access, where access is given to groups who can resolve this problem. Root Cause Analysis, in this the cause is identified and cause notes and fixed notes is given and also state will be updated.

➔ The Change Management module in ServiceNow is designed to manage the lifecycle of changes to IT services, applications, or infrastructure. The primary goal is to implement beneficial changes with minimal disruption to services.

➔ Change request contains detailed information regarding the change, like the reason for the change, risk, priority, change type, and change category.

➔ A systematical approach for controlling the life cycle of all changes, making it easier to have beneficial changes with less disruptions to the IT services is called ServiceNow Change Management.



➔ The above image shows us all the fields of change request management in ServiceNow.

Fields in a Change Request:

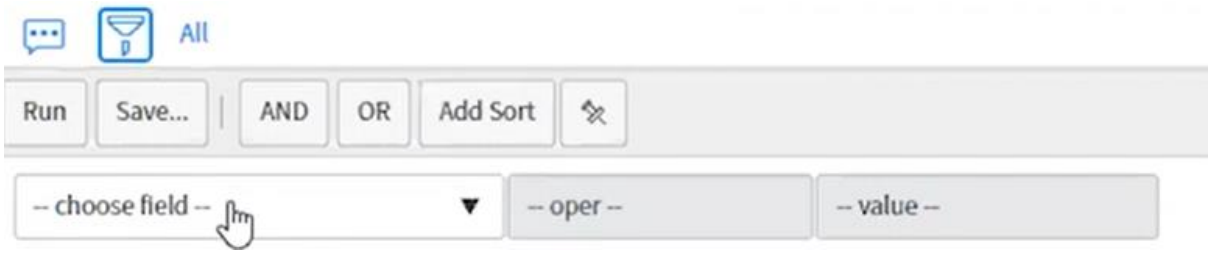
- **Change Type**: Normal, Standard, or Emergency.
- **Category**: Describes the type of change (e.g., infrastructure, application, etc.).
- **Priority**: The urgency and impact of the change.
- **State**: The current status of the change (e.g., New, Assess, Authorize, Scheduled, etc.).
- **Risk**: The potential risks associated with the change.
- **Approval**: The approvals required from various stakeholders.
- **Implementation Plan**: A detailed plan on how the change will be implemented.
- **Backout Plan**: Steps to undo the change if necessary.
- **Schedule**: When the change is planned to be executed.
- **Post-Implementation Review**: A review to evaluate the success of the change.

➔ Lists display records from a table in a tabular format, allowing users to view multiple records at once. Each row in a list corresponds to a record, and each column represents a field in that record.

➔ Lists are customizable, such as the ones where a user has to choose which columns to display, their order, and sorting criteria. Any such customization could later be reused.

➔ In the list controls we have view, filters, group by, show, refresh and create favourite tools.

➔ Filters in ServiceNow are used to narrow down records in a list based on specific conditions. Filters allow users to extract the exact data they need from large datasets, helping in better data management and quick retrieval.



➔ Users can combine multiple conditions to create complex filters using logical operators like AND, OR.

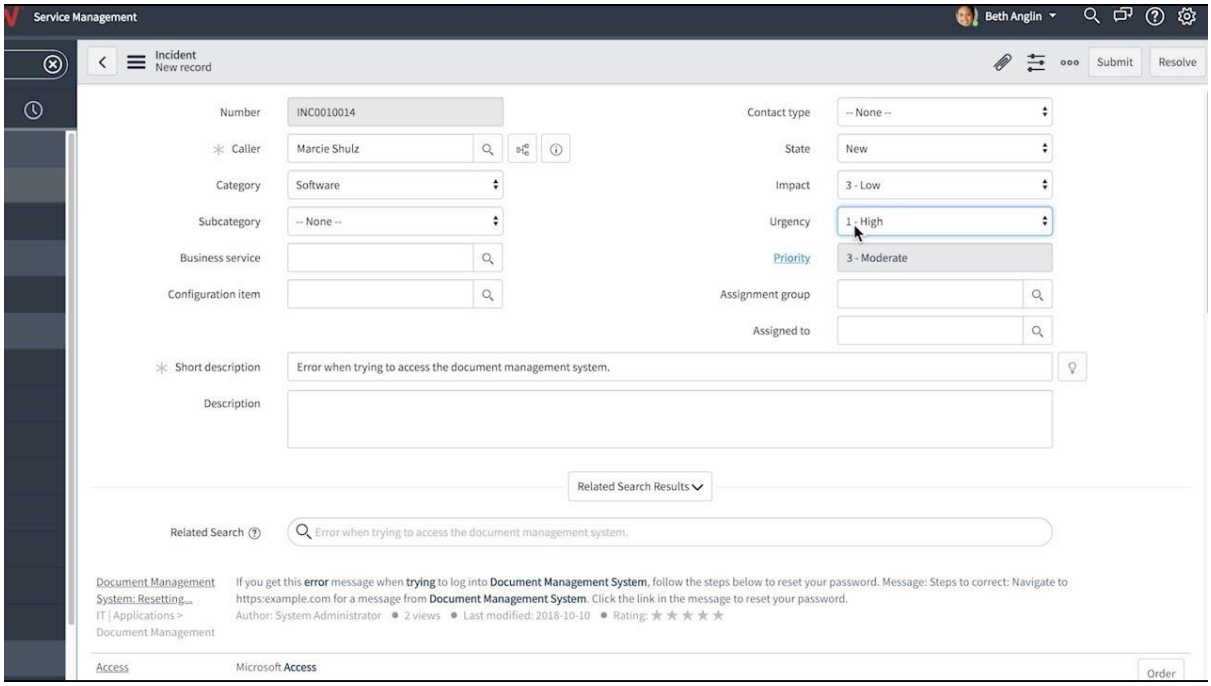
➔ When a filter is applied, it appears as a breadcrumb trail above the list, allowing users to see which filters are active and remove them easily.

➔ We select multiple filters for a list. Breadcrumbs shows all the filters that are selected.

All > Caller = System Administrator > Active = true > Universal Request is empty

➔ In ServiceNow, each table is represented as a list, which contains individual records. When you open a specific record from this list, it is displayed in a detailed view called a form.

➔ Forms in ServiceNow are the primary way users interact with data. They provide a structured interface for entering and managing records within tables.



➔ Forms in ServiceNow are essential elements that allow users to interact with records and data within the platform.

➔ There are many different forms in ServiceNow, but these forms have similarities such as header, fields, sections, lists. Below image shows that in detail.

➔ While creating a new record there are 2 options to insert that record into table. Submit and save there are both the options that can be used to create a new record.

➔ Both the functionalities are different from each other, submit saves the record and exits the form whereas when saved that record the record will be inserted into table and the form wont exit, it still displays the form.

➔ The red Asterix mark indicates that as mandatory field, in the below image you can observe that.

➔ Forms also have activity streams where they show what are all the changes made by a user or administrator and the timeline.

➔ There are 2 ways to change the form configuration. Form layout and Form Design. This is only available for admins. Form layout is used to create new fields and adjust the layout of the form.

➔ Form Layout determines the order of fields and sections displayed on the form. You can add new fields, rearrange existing fields, or create form sections to group related fields.

➔ In the Form Designer, you can drag and drop fields, add sections, and configure various UI elements like form views, tabs, and field types (e.g., text, choice, date).

➔ ServiceNow entered the IT industry in 2004. Fred Luddy launched this. Fred Luddy is now a board member at ServiceNow and Bill McDermot is CEO.

➔ In the early 2000's all the companies managed their incidents and tickets using BMC Remedy tool. There was no alternative for companies as well to manage incidents and tickets.

➔ ServiceNow initially started as a ticketing tool but has since evolved by incorporating other technologies. It has replaced BMC Remedy tool.

➔ Since its launch in 2004, ServiceNow has grown significantly, and to date, no other platform has emerged as a direct competitor in terms of its comprehensive features and capabilities.

➔ ServiceNow has many clients which include Netflix, AirBus, American Express, etc. Each of them uses ServiceNow for different services.

➔ Netflix is using it as customer support, American Express is using for ITSM Services.

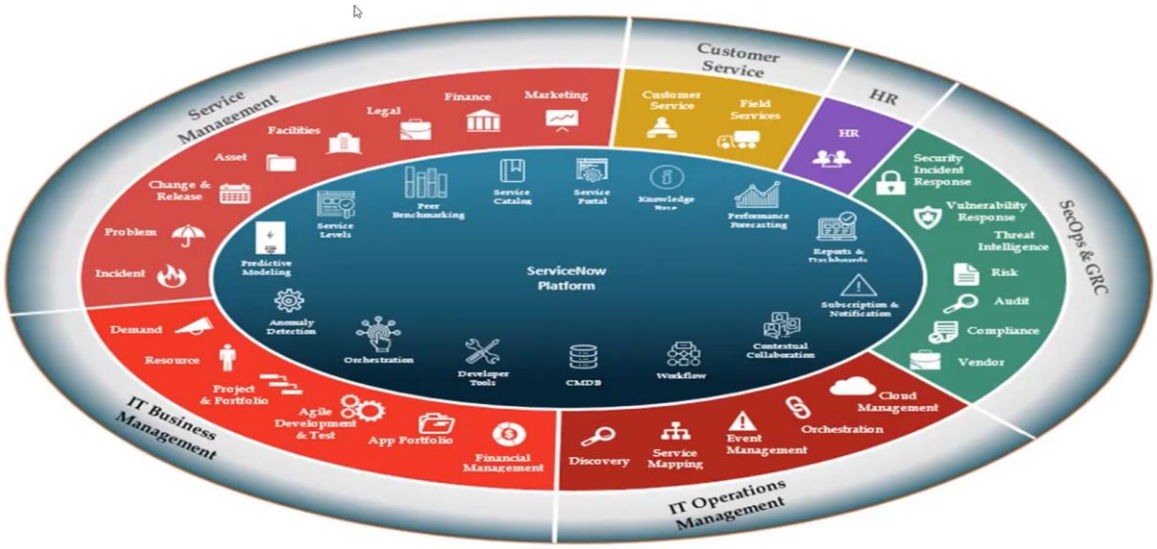
➔ When ServiceNow was launched initially its stock price was $0.24. Now the current stock price is $878.

➔ ServiceNow stock has experienced remarkable growth, increasing by over 243,000% in the past 20 years, reflecting the platform's evolution and success since its inception.

➔ The above image shows us the major customers of ServiceNow, these are only major clients but there are many who use ServiceNow.

➔ ServiceNow is often used to track incidents related to infrastructure, payments, or IT services. These companies can also use ServiceNow to automate HR processes, such as onboarding, employee inquiries, and benefits management.

ServiceNow Architecture



➔ The image presents the architecture of the **ServiceNow platform**, showcasing how it integrates multiple business processes and functionalities under one unified system.

➔ While ServiceNow offers a comprehensive platform covering various business processes, 70-80% of companies primarily use it for IT Service Management (ITSM).

➔ For many companies, ITSM—which includes Incident, Problem, Change, and Service Request Management—is the main reason they adopt ServiceNow. These functions help streamline IT operations, ensuring efficient incident resolution, minimizing downtime, and automating routine service requests.

➔ IT teams rely heavily on ServiceNow to track incidents and resolve problems, using the platform's capabilities to log, prioritize, and manage tickets. This is the most common usage in organizations that need to maintain high availability of IT services.

➔ ServiceNow allows companies to manage change and release cycles, ensuring that updates and changes to IT infrastructure are handled in a controlled, systematic manner to avoid service disruptions.

➔ Service Catalog is a request ordering system. To request services and products offered by different departments of any organization.

➔ Service Catalog is a one stop solution to request different services provided by all the departments in the organization. All the services are categorized which helps users to choose the right service.

➔ Multiple catalogs can be implemented by an organization. Multiple requests can be raised and also can track that, when exactly you're going to get that service.

➔ In service catalog application, where users with catalog roles can edit, create and manage services, products and different configurations provided by different departments.

➔ Services and products of service catalog are divided into logical groups which are called categories. For example, we have hardware, software, office etc.

➔ Service Catalog has 3 major components. First one is order, which is a service or a product requested by user. Then we have order form which is submitted by the user after filling up the form. The last one is ordering process which works when the request is created.

➔ Each catalog item can have a predefined workflow that handles the process from submission to fulfillment. Workflows can include approval steps, task assignments, notifications, and more, ensuring that the request is processed efficiently.

➔ There are 3 different tasks tables and records associated with service catalog, when user places an order to request service or product, it creates records related to the request.

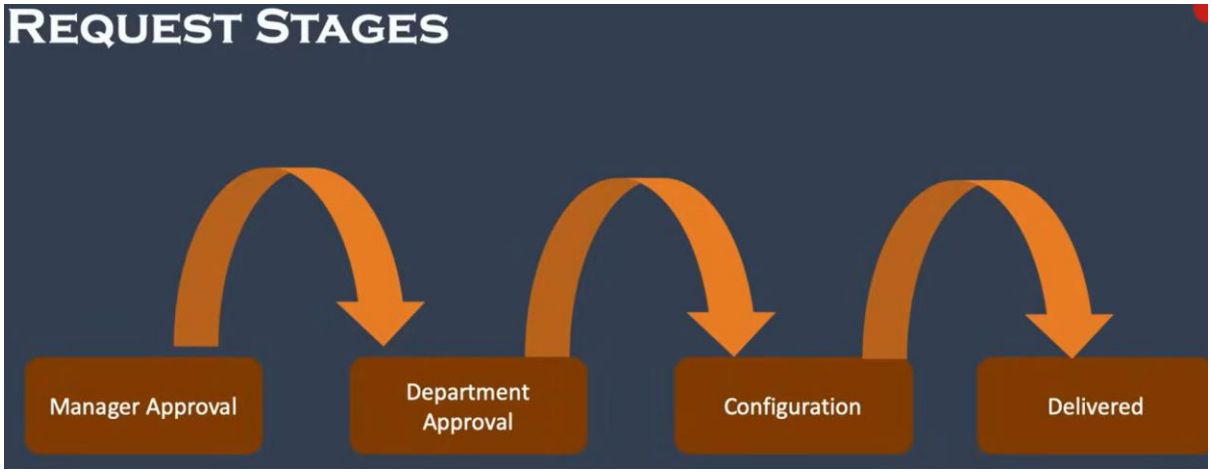
➔ When form is submitted it creates request record, which gets created in sc_request table. It is the first request when user submits the form.

➔ Next after submitting the form, item record is created in Request item table(sc_re_item). Every request item will have catalog task records(sc_tasks) each task is assigned to different teams so that they can process the request.

➔ Try it button in another useful feature by ServiceNow, this exactly shows us the form which is visible to the user.

➔ When request is submitted by the user, then users can track the request by knowing the stages of the requested item.

➔ These stages can be created and customized by the admins for different items as per the requirements.



➔ These stages are not static they are dynamic, if you have access in ServiceNow service catalog you can also create these stages.

➔ A Variable in ServiceNow is a field that is used to gather user inputs when submitting a request. Each variable is associated with a catalog item and can collect different types of data, such as text, numbers, dates, or selections from a list.

➔ A Variable Set in ServiceNow is a collection of variables that can be reused across multiple catalog items or services. Instead of manually adding the same variables to multiple catalog items, you can group them in a variable set and then apply the set wherever needed.

➔ Dashboards are collections of reports and other widgets that provide a consolidated view of key information. Reports can be added to dashboards to visualize and monitor metrics and trends in a single view. Dashboards help in decision-making by providing an overview of critical data in real-time.

How to Create a Dashboard in ServiceNow:

➔ **Access the Dashboard Creation Module**: Navigate to the Self-Service section or search for "Dashboards" in the navigation bar. Click on the Create New Dashboard option.

➔ **Set Basic Information**: Provide a name and description for your dashboard. Choose whether the dashboard will be shared with others or kept private. You can also assign the dashboard to specific roles or groups.

➔ **Add Widgets**: Once the dashboard framework is created, you can add **widgets**. These can be lists, pie charts, bar charts, gauges, or reports. Widgets are interactive, allowing users to configure them to show specific data from modules like incidents, service requests, change management, and more.

➔ **Configure Data Sources**: Select the data source for each widget. For example, if you're monitoring IT incidents, the data source could be the **Incident Table** in ServiceNow. Customize the data filters to display the information that is most relevant.

➔ **Arrange the Layout**: Arrange the widgets on the dashboard to create a cohesive layout. You can drag and drop widgets to different positions or resize them for optimal viewing.

➔ **Save and Share**: After configuring and arranging the widgets, save the dashboard. You can share it with other users or keep it private based on your preferences.

Key Features of Dashboards in ServiceNow:

➔ **Data Visualization**: Dashboards allow users to visualize data through charts, graphs, gauges, and lists, providing insights into system performance, service delivery, or incidents in an intuitive way.

➔ **Real-Time Monitoring**: Dashboards provide **real-time data** updates, ensuring that users have access to the most current information for decision-making.

➔ **Customizability**: Users can create **custom dashboards** tailored to their specific needs. Whether for IT operations, HR processes, or security monitoring, each team can design dashboards that show the metrics and KPIs relevant to them.

➔ **Role-Based Access**: Dashboards can be configured with role-based access, meaning only certain users with the appropriate permissions can view, create, or edit specific dashboards.

➔ **Drill-Down Capabilities**: Many dashboards' widgets support drill-down functionality, enabling users to click on a graph or chart to explore the underlying data for more detailed analysis.