

ServiceNow

Week – 2

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ServiceNow Platform:

- ➔ ServiceNow provides application platform as service (APaaS).
- ➔ It is cloud-based platform which provides infrastructure needed to develop, manage and run applications.
- ➔ Organizations can utilise ServiceNow in various departments such as IT, HR , Customer Service Management and also security.
- ➔ Organizations can automate different business processes using ServiceNow platform and increasing their speed of delivery.
- ➔ ServiceNow uses a multi-instance architecture, unlike many cloud platforms that rely on multi-tenant setups where data can be shared among companies. Each ServiceNow instance is separate, keeping your data and configurations completely distinct.
- ➔ In these multi-instance architecture, organizations data, applications and customizations reside in a unique software stack called instance. Every organization might have more than one instance but are isolated with each other and can be communicated.

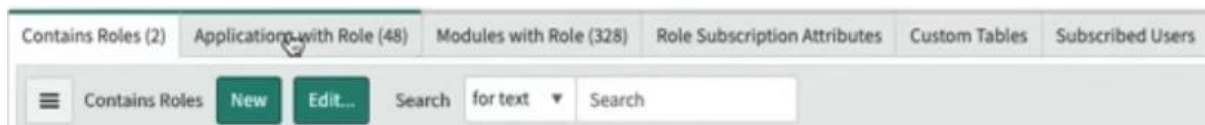
ServiceNow User Interface:

- ➔ There are 3 ways to interact with ServiceNow User Interface. One is Native UI basically the web page of ServiceNow. Second is Mobile apps. Third is Service Portal. All the data is same in all these types of interfaces.
- ➔ ServiceNow provides 3 different Apps. They are ServiceNow Agent, Now Mobile, ServiceNow Onboarding. Administrators can use them as per the business requirement.
- ➔ The Native UI is the primary UI. It is the best used on desktop and laptops and is accessed via a web-browser and the instance URL.
- ➔ We can access service portal by adding sp in the URL. After the domain name just add sp in the URL and you'll be redirected to service portal.

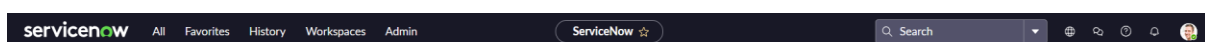


- ➔ These are all the options and many more are available in the service portal. But it mainly depends on the access that user gets.
- ➔ Roles are assigned to users depending on their functions and responsibilities they have. Not everyone needs to access all the information all the time, they only need some specific information which ServiceNow uses role-based access to provide them what's needed.
- ➔ ServiceNow has Users and Groups table. You can easily navigate them by typing them in application navigator. Users table show the data of all the users and each individual user has many fields like name, ID, Password, and many more details. Passwords can be set by admin and after setting password user can access instance by logging in using those credentials.
- ➔ In the similar way groups table shows all the groups that exist. Each group shows all the information in detail. It displays Group name, description, manager, roles and group members.

- ➔ Roles table also displays all the roles which are out of the box in ServiceNow. Each role describes its name, application (whether it is global or local), description, and also it has other options as well which are shown in below image.



- ➔ Roles can be assigned to individual users or groups. But the best practice is to assign roles to groups rather than assigned them to individual users.
- ➔ ServiceNow provides one of the useful feature 'impersonate user'. You can get the view of any user if you have proper permissions and rights.
- ➔ If a user encounters an issue, the "impersonate user" feature would be very useful. It allows us to see exactly what the user sees, enabling us to identify and resolve the problem more easily.
- ➔ UI's has versions, users can switch to versions depending on which UI they'll work. Go to settings and you can find switch UI button, when clicked it changes UI version and in the same way you can go back to previous version as well.
- ➔ ServiceNow main screen is divided into 4 main elements. That are banner frame, Application Navigator and content frame.



- ➔ Banner frame appears at the top of every page and contains logo, user menu, system settings, global search, favourites, notifications, chat, help and history.
- ➔ Application Navigator which provides easy access to ServiceNow modules and application instances
- ➔ Content frame shows the information of application or module selected, you'll see form, list and other pages in content frame.

- ➔ Branding in ServiceNow refers to the customization of the platform's user interface (UI) to reflect an organization's brand identity.
- ➔ This involves modifying the look and the ServiceNow instance to align with the company's colours, logos, fonts, and other visual elements.
- ➔ Branding enhances user experience by providing a familiar and consistent visual environment across the platform.
- ➔ In the application navigator, navigate to UI16 you can see the below image the UI looks this way. In this you can enhance your branding by adding your organizations name, caption and adding a banner image. We can also enhance colours according to organization.

System Configuration

Tailor the look of the page top banner - text / logo / color
Set the timezone, date, and time formats

Page header caption

Service Management

Browser tab title

ServiceNow

System timezone for all users unless overridden in the user's record

System (America/Los_Angeles) ▼

[Configure available time zones](#)

Banner image for UI16



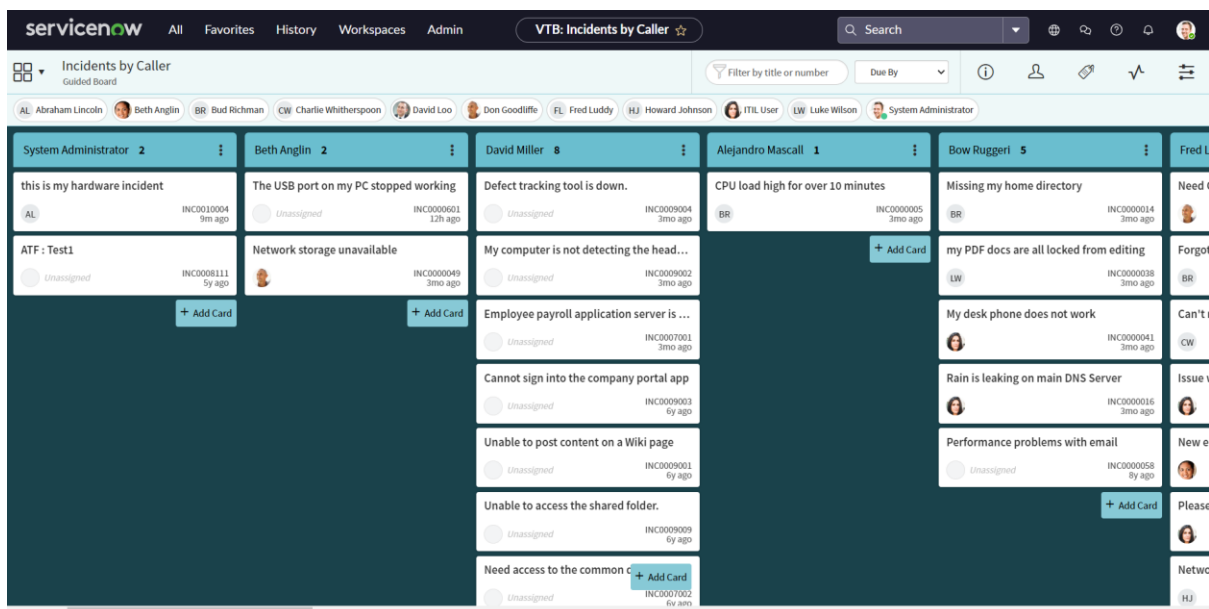
- ➔ For the Now Platform UI, navigate to System UI > System Properties > Basic Configuration UI16. Here you can change the banner, colours, and logo properties.
- ➔ ServiceNow allows you to configure branding settings for multiple languages to ensure a consistent experience for global users. This can be set up using the Multi-Language Support feature.

- ➔ 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.

The screenshot displays a ServiceNow 'Incident New record' form. The form is organized into two main columns of fields. The left column includes 'Number' (INC0010014), 'Caller' (Marcie Shulz), 'Category' (Software), 'Subcategory' (None), 'Business service', and 'Configuration item'. The right column includes 'Contact type' (None), 'State' (New), 'Impact' (3 - Low), 'Urgency' (1 - High), 'Priority' (3 - Moderate), 'Assignment group', and 'Assigned to'. Below these fields are 'Short description' and 'Description' text areas. At the bottom, there is a 'Related Search Results' section with a search bar containing the text 'Error when trying to access the document management system.' and a list of related search results, including 'Document Management System: Resetting...' and 'Microsoft Access'.

- ➔ 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).
- ➔ 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.
- ➔ Forms can include related lists at the bottom of the page to show related records from other tables. This helps provide a comprehensive view of related data, such as tasks related to an incident.

- ➔ Task Management in ServiceNow involves creating, assigning, tracking, and managing various tasks within different workflows, such as Incident Management, Problem Management, Change Management, and other business processes. ServiceNow provides several tools and features for effective task management across departments and teams.
- ➔ In ServiceNow, a **task** is any record that requires action and can be assigned to a user or group. Tasks are records in the task table or any child table that extends from it, like Incident, Change Request, Problem, Request, etc.
- ➔ The three most common tasks in ServiceNow are Change Request, Incident, and Problem. These three are different tables and are extensions to the task table.
- ➔ Tasks can be assigned to a individual User or a Group of Users. We can assign tasks using Assigned to or Assignment group. Tasks can be automatically assigned or can also be manually assigned.
- ➔ Users can create, view, edit, and manage tasks directly from various applications or modules. For example, an Incident can be created under Incident Management, or a Change Request can be created under Change Management.



- ➔ Visual Task Board (VTB) is a drag-and-drop interface that provides a visual representation of tasks. VTBs allow users to manage tasks more intuitively by dragging tasks between lanes (columns) representing different states or priorities.

- ➔ Users can customize boards to suit their needs by adding or removing columns, changing labels, and configuring card types. Just by dragging them you can do many things.
- ➔ Tasks can be integrated with the Knowledge Base to provide helpful articles and documentation related to the task at hand. This helps users resolve tasks more efficiently.
- ➔ ServiceNow provides out-of-the-box notifications for task updates, assignments, and state changes. These notifications can be customized or created as per business requirements to keep users informed.
- ➔ ServiceNow includes powerful Reporting and Analytics tools that allow you to track task performance, workload, bottlenecks, and SLA compliance. Dashboards can be configured to provide a visual representation of key task metrics.