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.

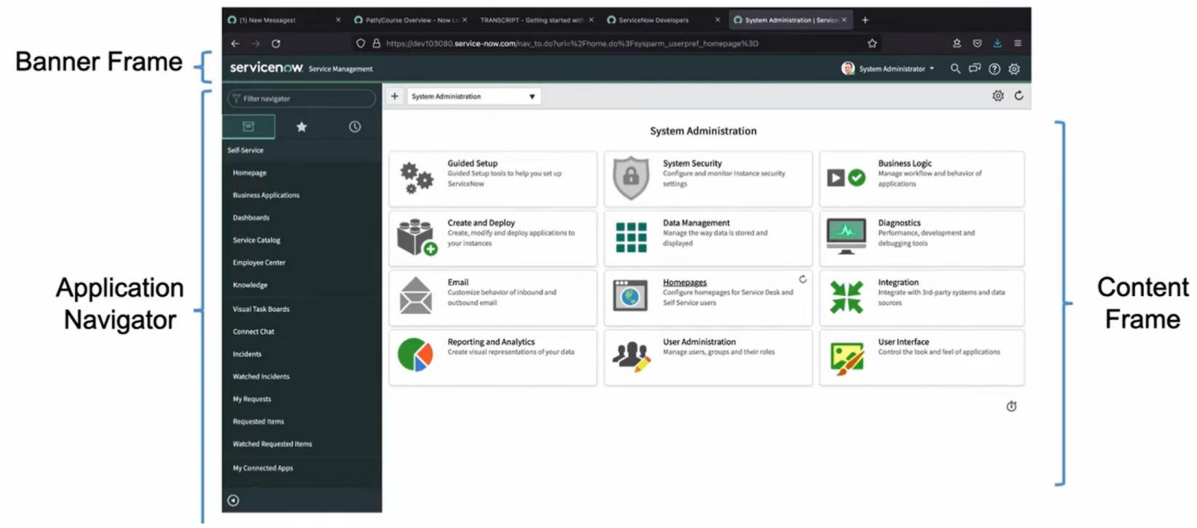
- **IT Asset Management**: Helps manage and track the lifecycle of IT assets, from procurement to retirement. Optimizes asset usage, reduces costs, and improves inventory management.

- **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.

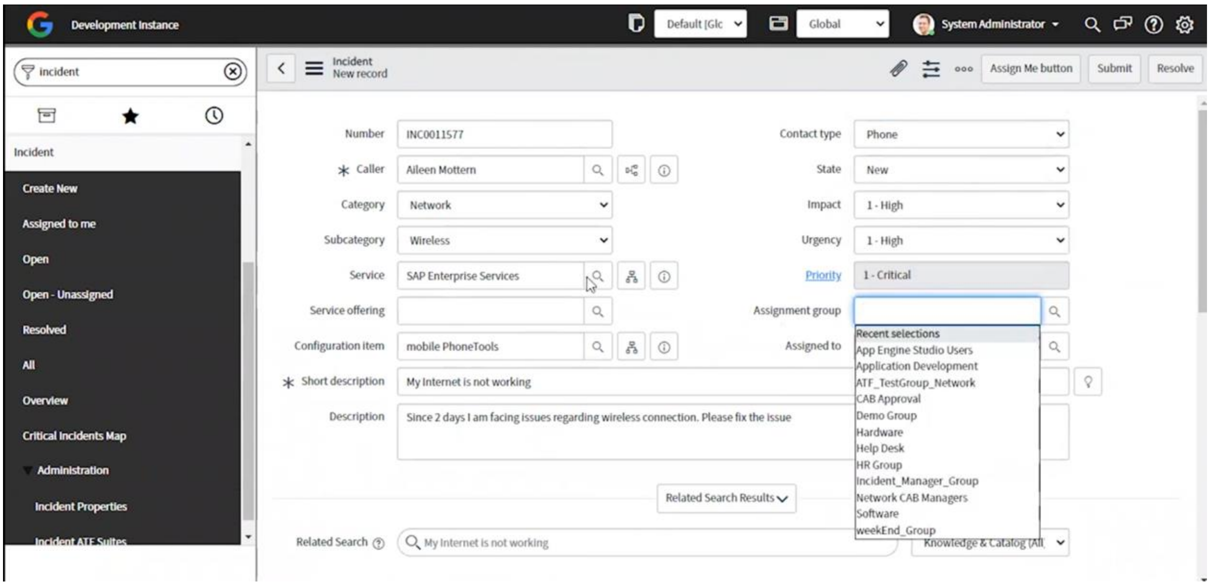
- ➔ **Application Navigator**: Located on the left-hand side of the interface. This is where users can access different modules and applications available in ServiceNow. It includes commonly used items like Self Service, Business Applications, Service Catalog, Incidents, Knowledge, Dashboards, etc.

- ➔ 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.

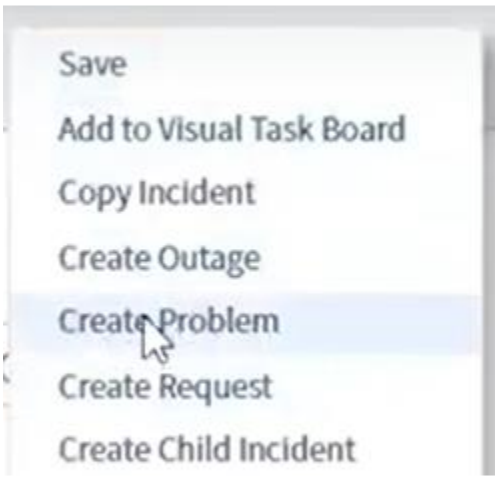
- Now the group will look into your problem. First, they'll change the state from new to in progress. After resolving they'll also provide resolution notes.

- 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.

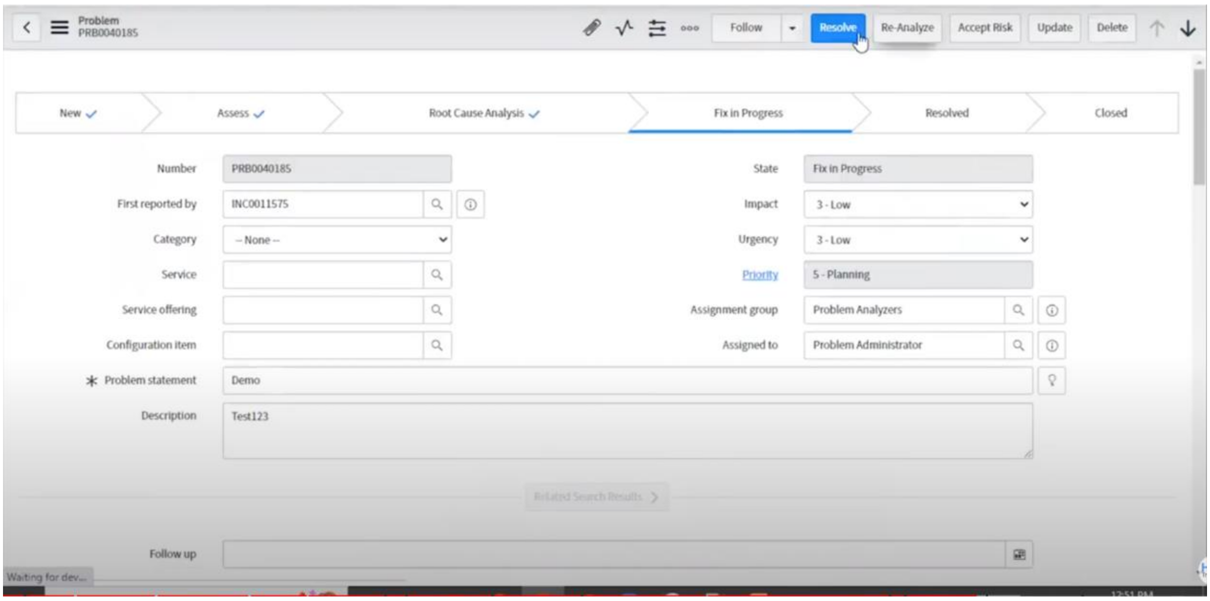
- First when the resolution team changes the state, user will get notified that team started working on problem. After resolving another email stating that 'your incident (number) has been solved.

- 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.



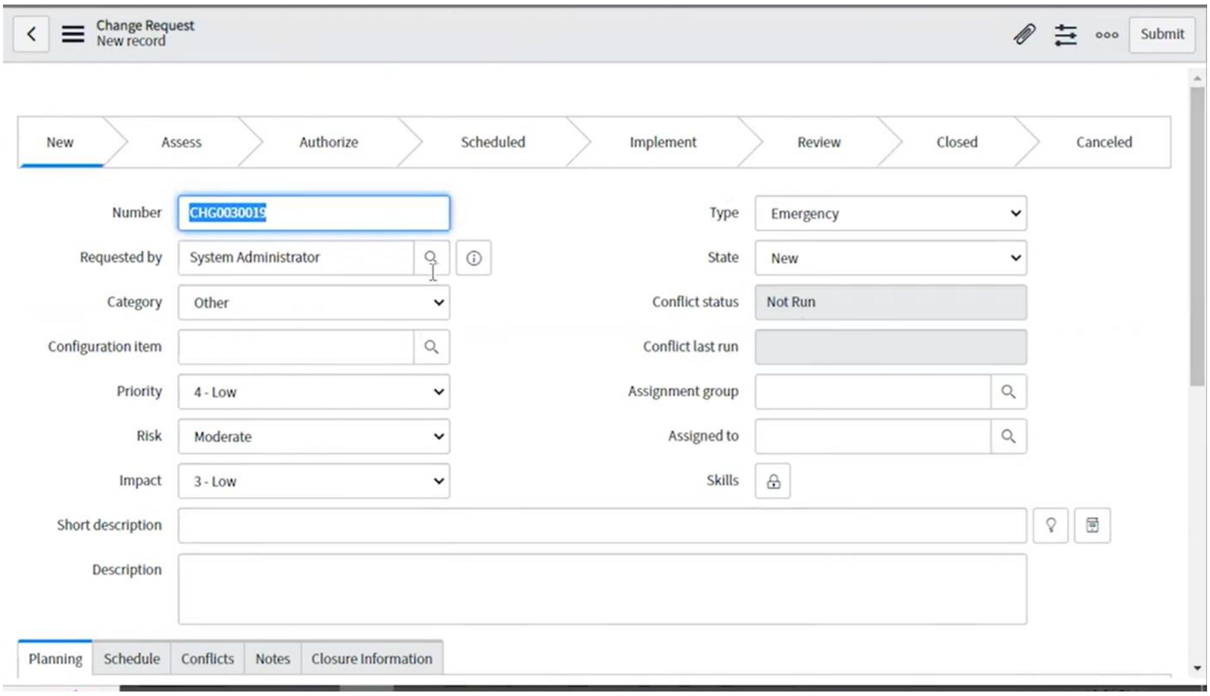
➔ This image illustrates a **Problem Record** in ServiceNow, showing different fields and stages of the problem management process.

➔ 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:

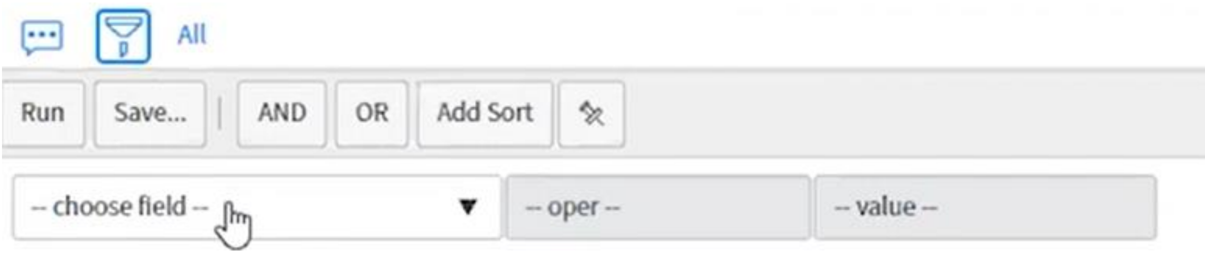
- **Change Type**: Normal, Standard, or Emergency.
- **Category**: Describes the type of change (e.g., infrastructure, application, etc.).
- **Priority**: The urgency and impact of the change.
- **State**: The current status of the change (e.g., New, Assess, Authorize, Scheduled, etc.).
- **Risk**: The 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.



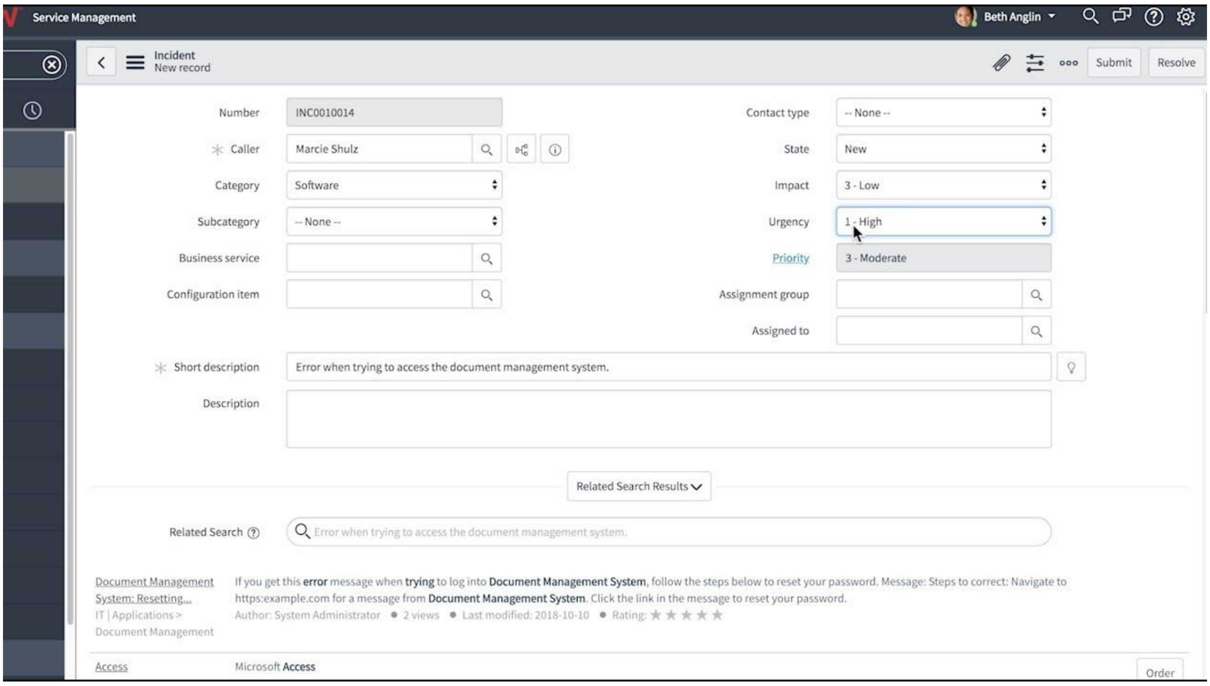
- Users can combine multiple conditions to create complex filters using logical operators like AND, OR.

- 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.

- 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).