ServiceNow Platform Week-1 Notes

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1 Introduction to ServiceNow

ServiceNow is this cool cloud platform that helps big companies manage their IT stuff. It's like a Swiss Army knife for businesses!

1.1 Key Points

- Founded in 2003 (originally called GlideSoft)
- Went public in 2012
- Has over 17,000 employees worldwide (that's a lot of people!)
- CEO is Bill McDermott (former SAP guy)
- Aims to make IT processes less of a headache for regular business users

1.2 Why It's Important

ServiceNow is a big deal because:

- It lets non-tech people solve their own IT problems (no more waiting for IT to fix everything!)
- It's all cloud-based, so it's super scalable and secure
- You can customize it to fit your company's needs

2 Platform Overview

The ServiceNow platform is like a giant Lego set for business processes. It's got a bunch of different parts that all work together.

2.1 Architecture

- Multi-instance architecture (each customer gets their own "playground")
- Uses something called "Application Platform as a Service" (APaaS)
- Has regular backups and security stuff to keep data safe

2.2 User Interface

The UI is web-based and has these main parts:

- Banner frame (top part with important buttons)
- Application navigator (left side, for finding different apps)
- Content frame (main area where you do stuff)

There's also a mobile app and a customizable service portal. Pretty neat!

3 Customization and Branding

You can make ServiceNow look like it belongs to your company. It's like giving it a makeover!

3.1 Branding Options

- Change logos
- Customize colors and fonts
- Create a personalized welcome page

Note to self: Customizing ServiceNow can help with user adoption. People like using stuff that looks familiar!

3.2 Company Settings

Company settings are like the DNA of your ServiceNow instance. You can set up:

- Company name and logo (duh!)
- Time zones and date formats
- System emails and stuff

Remember: Changing company settings affects EVERYONE. Don't mess it up!

3.3 Guided Setup

Guided Setup is like having a personal tour guide for customizing ServiceNow:

- Step-by-step wizards for common tasks
- Helps newbies set up complex features
- Can use it for branding, user management, and more

Pro tip: Always check Guided Setup before trying to figure stuff out on your own. Saves tons of time!

3.4 ServiceNow Portal

The Portal is like the front door to your ServiceNow instance for end-users:

- Customizable interface for self-service
- Can create multiple portals for different groups
- Widgets make it easy to add functionality

Cool idea: Make different portals for employees, customers, and vendors. Each group gets what they need!

3.5 UI Builder

UI Builder is the new kid on the block for making awesome interfaces:

- Drag-and-drop interface (no coding required!)
- Can create custom pages and workspaces
- Uses components for reusable bits of UI

Note to self: Learn more about UI Builder. Might be useful for that project next semester!

Fun fact: UI Builder is replacing the old Content Management System (CMS). Out with the old, in with the new!

4 Lists and Filters

- Lists show database table records
- You can use filters to find exactly what you need
- The dot list command (e.g., task.list) is a quick way to open specific tables

4.1 ServiceNow List View

List View is like the Excel of ServiceNow, but way cooler!

4.1.1 Interface

- Headers at the top (click to sort - so handy!)
- Rows for each record (duh)
- Little icons next to each row for quick actions
- Context menu when you right-click (tons of options)

Note to self: The context menu is a lifesaver. Learn all the options!

4.1.2 Standard Paradigm

ServiceNow likes to keep things consistent:

- Lists look pretty much the same across different tables
- Usually see stuff like Number, Short description, Assignment group, etc.
- Can customize what columns show up (neat for different teams)

Pro tip: Learn the standard columns. They show up EVERYWHERE!

4.2 List Control

This is the command center for your lists:

- Usually at the top of the list
- Has buttons for New, Delete, Copy, etc.
- Search bar (life-saver for big tables!)
- Personalize button to tweak your view

Remember: Different roles might see different options in List Control.

4.3 Filter Conditions

Filters are like magic wands for finding data:

- Can filter by any field (text, numbers, dates, whatever)
- Use conditions like equals, contains, greater than, etc.
- Combine filters with AND/OR for complex searches
- Save favorite filters for later (future you will thank you)

Cool trick: Use * as a wildcard in text filters. Like "comp*" to find "computer" and "company".

4.4 Refresh List

Sometimes your list gets stale. Refresh it!

- Click the refresh button (looks like a circular arrow)
- Use keyboard shortcut Ctrl+Alt+R (for lazy people like me)
- Some lists auto-refresh (but don't count on it)

Funny story: Once spent 10 minutes wondering why my new record didn't show up. Forgot to refresh. Don't be like me!

Final thoughts: Lists are the bread and butter of ServiceNow. Get good at using them, and you'll be a ServiceNow wizard in no time!

5 Forms in ServiceNow

Forms are like the Swiss Army knife of ServiceNow. They're how you view, edit, and create records. Super important stuff!

5.1 The Standard Layout

ServiceNow forms have a pretty consistent look:

- Header with record info and actions
- Main body with all the fields
- Footer with buttons (Save, Update, etc.)

Note to self: The layout is similar across different record types. Learn it once, use it everywhere!

5.2 Form Field Types

Fields come in all shapes and sizes:

- Text fields (for names, descriptions, etc.)
- Numeric fields (for counting stuff)
- Date/Time fields (never forget a deadline again!)
- Reference fields (link to other records - it's like Instagram tagging but for data)
- Choice fields (dropdowns, radio buttons, checkboxes)

Pro tip: Hover over a field for a little help text. Lifesaver during exams!

5.3 Saving Changes

Don't forget to save your work!

- "Save" button (duh)
- "Update" for existing records
- "Insert" for new records
- "Insert & Stay" (for when you're on a roll creating new stuff)

Embarrassing story: Once lost an hour's work because I forgot to hit save. Never again!

5.4 Form Sections

Forms are divided into sections to keep things organized:

- Usually collapsible (click to expand/collapse)
- Help group related fields together
- Can be customized by admins

Remember: Collapsed sections might hide important info. Always check!

5.5 Related Lists & Formatters

At the bottom of forms, you'll often see related lists:

- Show records related to the current one
- Can add, edit, or delete related records right there
- Formatters make the lists look pretty (colors, icons, etc.)

Cool trick: Right-click on a related list header for more options!

5.6 Form Views

Different strokes for different folks:

- Multiple views can exist for the same form
- Show different fields or layouts based on user role
- Switch between views using the view picker (if you have permission)

5.7 Form Personalization

Make forms work for you:

- Reorder fields (drag and drop)
- Hide fields you don't need
- Create your own personal view

Note: Your personalization doesn't affect other users. Go wild!

5.8 Adding Attachments

Because sometimes a picture is worth a thousand words:

- Look for the paperclip icon
- Drag and drop files (so easy!)
- Can view attachments right in the form

5.9 Form Templates

For when you're tired of filling out the same info over and over:

- Pre-fill forms with common info
- Save time on repetitive tasks
- Can be shared with other users

Idea: Create a template for weekly report submissions. Work smarter, not harder!

5.10 Creating & Editing Views

For the power users (aka future me):

- Need admin rights (obviously)
- Can create new views from scratch
- Edit existing views to add/remove fields, change layout, etc.
- Use UI Policies to show/hide fields based on conditions

Final thoughts: Forms are the face of ServiceNow. Get comfortable with them, and you'll be everyone's go-to ServiceNow guru!

6 Importing Data

Getting data into ServiceNow is a big deal. It's like feeding a hungry database monster!

6.1 The Basic Process

Here's the general idea:

1. Create a data source (tells ServiceNow where the data is coming from)
2. Use a staging table (temporary holding area for imported data)
3. Create transform maps (tells ServiceNow how to move data from staging to final tables)
4. Set up field maps (matches fields in source to fields in target)

Pro tip: Use the coalesce function to avoid duplicate records!

6.2 Integrations in ServiceNow

Integrations are like building bridges between ServiceNow and other systems. Cool stuff!

6.2.1 Creating a DataSource

- Go to System Import Sets ¿ Administration ¿ Data Sources
- Click ”New” (duh)
- Choose the type (File, JDBC, Web Service, etc.)
- Fill in the details (like connection info)

Note to self: Different source types need different info. Pay attention!

6.2.2 Types of DataSources

- File: For CSV, Excel, XML (basically, stuff you can download)
- JDBC: For connecting to other databases (SQL nerds, rejoice!)
- Web Service: For fancy API integrations
- Custom: When you’re feeling extra and want to code your own

Fun fact: You can use a MID Server to securely connect to internal company data. It’s like a data bodyguard!

6.3 Import Sets

Import sets are like the staging area for your data. It’s where the magic happens!

6.3.1 Creating Import Sets

- Automatically created when you run a data source
- Each import creates a new set (keeps things organized)
- You can see all your import sets in one place (neat for troubleshooting)

Weird quirk: Import set table names start with ”u_” - don’t ask me why!

6.3.2 Transforming Data

This is where you make your data fit into ServiceNow’s world:

- Use transform maps to define how data moves
- Can transform data on the fly (like changing date formats)
- Set up field maps to match source fields to target fields

Pro tip: Always double-check your transforms. One wrong move and you’ve got a data disaster!

6.4 The Grand Finale: Importing, Transforming, and Mapping

Putting it all together:

1. Run your data source to create an import set
2. Review the data in the staging table (make sure it looks right)
3. Set up your transform map (if you haven't already)
4. Run the transform (cross your fingers!)
5. Check the results in your target table

Note: You can set up scheduled imports to run automatically. It's like having a robot do your work!

6.5 Advanced Tricks

For when you're feeling fancy:

- Use scripts in your transforms for complex logic
- Set up coalesce fields to avoid duplicates
- Use "Auto Map Matching Fields" to save time (but always double-check!)

Dream scenario: One day, I'll set up a perfect, fully automated import process. No more manual data entry!

Final thoughts: Importing data is like cooking - it takes practice to get it right. But once you master it, you'll be the data chef everyone wants on their team!

7 Incident Management and Task Administration

ServiceNow is a powerful tool for handling incidents and tasks, making it a super-efficient to-do list for IT operations. It helps manage incidents, problems, and changes while keeping everything organized.

7.1 Task Management

- **Hierarchical Database Design**: ServiceNow uses a main task table that supports various subtables for specific task types.
- **Main Task Table with Subtables**: There are dedicated subtables for incidents, problems, changes, etc., allowing for task categorization and customization.

- **Automated Task Assignment**: Rules can be set up to automatically assign tasks based on criteria like incident type, required skills, or user location.

7.2 ServiceNow Ticket and Task Management

- **Incident Management**: Focuses on quickly restoring service after disruptions. Incidents are logged and tracked to ensure timely resolution.
- **Problem Management**: Aims to identify and fix the root cause of incidents. Helps in preventing recurring issues by analyzing trends.
- **Change Management**: Manages the lifecycle of changes to minimize disruption. Helps in planning, tracking, and implementing changes effectively.

7.3 Task Creation and Assignment Rules

- **Task Creation**: Tasks can be created manually or automatically through workflows and integrations.
- **Assignment Rules**: Predefined rules route tasks to the appropriate teams or individuals. Criteria might include incident type, affected system, or user location.
- **Automatic Routing**: Reduces manual effort and ensures tasks are handled by the right personnel.

7.4 Task Collaboration

- **Collaboration Tools**: Allows users to leave comments, attach files, and tag other users on tasks.
- **Real-Time Updates**: Team members are kept in the loop with live updates, which helps in faster task resolution.
- **Centralized Communication**: All relevant information is shared in one place, promoting effective teamwork.

7.5 Visual Task Boards (VTBs)

- **Digital Kanban Board**: Provides a visual representation of tasks, making it easy to see task status at a glance.
- **Customizable Layout**: Columns can be customized to fit different workflows, reflecting task progress from start to finish.
- **Drag-and-Drop Functionality**: Tasks can be moved across columns to update their status, making task management intuitive.

- **Real-Time Collaboration**: Changes made on the board are updated in real-time, ensuring that everyone has the most up-to-date information.

8 Reporting

ServiceNow has powerful reporting capabilities. You can create all sorts of cool reports to show off your data and gain insights into your operations.

8.1 Report Creation

- **Uses the sys_report Table**: Report information is stored in the `sys_report` table, which keeps track of report configurations and settings.
- **Multiple Ways to Create Reports**: Reports can be created through the user interface (UI) using drag-and-drop options, by writing scripts, or using existing templates.
- **Scheduled Reports**: Reports can be scheduled to run automatically at specified intervals, such as daily, weekly, or monthly, ensuring up-to-date information is always available.

8.2 Types of Reports

- **List Reports**: Display records in a list format, often used for detailed data views.
- **Bar and Pie Charts**: Visual representations that help to quickly understand distributions and proportions.
- **Time Series Reports**: Used to track changes over time, useful for trend analysis.
- **Pivot Tables**: Allow for multi-dimensional analysis of data, useful for comparing different data points.
- **Performance Analytics Reports**: Advanced reporting that includes key performance indicators (KPIs) and scorecards for real-time monitoring.

8.3 Managing Reports

- **Cloning and Editing**: Existing reports can be cloned and edited to create new reports with similar structures but different filters or settings.
- **Filters and Conditions**: Reports can be customized using filters and conditions to show only relevant data.
- **Saving and Categorizing**: Reports can be saved for future use and categorized into folders for better organization.

- **Version Control**: Track changes made to reports over time to ensure data accuracy and consistency.

8.4 Sharing and Dashboards

- **Sharing Reports**: Reports can be shared with individual users, specific groups, or made available to all users in the system.
- **Embedding in Dashboards**: Reports can be added to dashboards, allowing users to have a consolidated view of key information in one place.
- **Access Control**: Permissions can be set to control who can view, edit, or run the reports, ensuring that sensitive information is only accessible to authorized users.
- **Exporting Reports**: Reports can be exported in various formats, such as PDF, Excel, or CSV, for use outside of ServiceNow.

9 Low Code/No Code Development

This is the future of app development! It lets regular people create apps without being coding wizards.

9.1 Benefits

- Faster development
- Empowers business users
- Reduces IT backlog

9.2 Limitations

- Might not be as flexible as traditional coding
- Could create "shadow IT" if not managed properly

Remember: Low code/no code doesn't replace IT pros. It just changes their role!