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Week 1 Understanding

Video 1: What is ServiceNow

Introduction

ServiceNow is a software company that focuses on simplifying and improving IT service management (ITSM) and various business workflows through its cloud-based platform. Founded by Fred Luddy in 2003, the company has grown significantly, becoming a key player in helping enterprises manage their IT services efficiently.

Who is Behind ServiceNow?

- **ServiceNow Employees:** The company employs over 17,000 people globally, and it has been recognized as a great place to work by Glassdoor and FORTUNE magazine.
- **Customers:** ServiceNow caters to mid-to-large enterprises, with clients like AT&T, Coca Cola, Deloitte, and Microsoft, among others.
- **Leadership:** Bill McDermott, the current CEO, joined the company in 2019 after a successful tenure at SAP. Fred Luddy, the founder, is still actively involved as the chairman of the board.

When Was ServiceNow Established?

- **2003:** Fred Luddy founded the company initially named GlideSoft.
- **2006:** The company was rebranded as ServiceNow.
- **2012:** ServiceNow went public under the ticker symbol "NOW."
- **2018:** The company was ranked #1 on FORBES magazine’s list of most innovative companies.

Why Was ServiceNow Created?

Fred Luddy's motivation for creating ServiceNow stemmed from his experience in IT, where he observed that IT processes often frustrated businesspeople. He envisioned a platform where IT services could be delivered in a way that was intuitive and efficient, allowing business users to solve problems themselves without heavy reliance on IT staff. This led to the creation of ServiceNow, a cloud-based platform that aims to be the IT department for companies, but in the cloud.

How Does ServiceNow Work?

ServiceNow operates as a cloud-based Application Platform as a Service (APaaS). The platform includes infrastructure, security, redundancy, and failover mechanisms, all

designed to support IT needs for businesses. It offers a wide range of pre-built applications and workflows, categorized into IT Workflows, Employee Workflows, Customer Workflows, and Creator Workflows. If the existing applications don't meet a company's specific needs, custom workflows can be created within the platform.

Where is ServiceNow Located?

ServiceNow is headquartered in Santa Clara, California, with offices and data centers spread across North America, Latin America, Europe, the Middle-East, Africa, Asia Pacific, and Japan.

ServiceNow in a Single Sentence

ServiceNow is a software company, based in Santa Clara, California, founded by Fred Luddy in 2003 to solve problems large enterprises face with traditional IT delivery by providing a robust, simple-to-use cloud-based environment in which businesspeople can solve business problems themselves.

Video 2: ServiceNow Platform Overview

Introduction

This video is part of a series aimed at helping viewers become certified as ServiceNow System Administrators. The current episode continues from the ServiceNow Fundamentals learning path, covering Lesson 2, which is focused on providing an overview of the ServiceNow platform.

Key Topics Covered

1. **ServiceNow Platform Overview**
    - **Now Platform Architecture**
    - **Applications and Workflows**
    - **User Interface Types**
    - **Role-Based Access and Authentication**
2. **Getting Started with ServiceNow**
    - The video will guide viewers on how to set up their own fully functional ServiceNow instance to follow along and practice the concepts covered.

Fred Luddy: The Founder of ServiceNow

- Fred Luddy founded ServiceNow in 2004 with the aim to automate business workflows. His motivation stemmed from the frustration of IT staff making business professionals feel ignorant when explaining requirements. ServiceNow

was designed to allow business users to solve their own problems using technology.

- Fred Luddy is a college dropout who turned his idea into a billion-dollar company.

Now Platform Architecture

- The Now Platform is an **Application Platform as a Service (aPaaS)**, providing cloud-based infrastructure, platform services, and a suite of applications to support business processes.
- Unlike traditional cloud delivery models like Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS), ServiceNow combines elements of all three to offer a comprehensive solution.
- The platform operates on a single common database and data model, ensuring consistency across all applications and functions.

Applications and Workflows

- ServiceNow applications are categorized into four main workflows:
    1. **IT Workflows** - 79 applications
    2. **Employee Workflows** - 43 applications
    3. **Customer Workflows** - 93 applications
    4. **Creator Workflows** - 23 applications
- These workflows further break down into subcategories, each supporting different business functions like IT Service Management, Employee Onboarding, and more.

Multi-Instance Architecture

- ServiceNow uses a **multi-instance architecture**, where each customer has a dedicated instance, ensuring data separation and control. This is different from typical multi-tenant cloud environments where multiple customers share the same instance.
- The platform offers high availability and redundancy, with each data center paired with another for failover and backup, ensuring minimal downtime.

Backups and Security

- ServiceNow provides four weekly full backups and six days of differential backups. The platform's security is certified by third-party organizations, ensuring data protection.

Domain Separation

- ServiceNow allows for **domain separation**, enabling organizations to segregate data and administrative tasks into different domains, enhancing security and control.

User Interfaces

- The platform offers three primary user interfaces:
    1. **Now Platform UI** - Best suited for desktop and laptop users.
    2. **ServiceNow Mobile Apps** - Three apps targeting different functions: Agent App, Now Mobile App, and Onboarding App.
    3. **Service Portal** - A widget-based, customizable interface for specific user groups.

Role-Based Access

- Access control in ServiceNow is managed through **users**, **groups**, and **roles**:
    - **Users** are individuals with access to the platform.
    - **Groups** are collections of users with common access needs.
    - **Roles** are collections of permissions assigned to users or groups, controlling what actions they can perform.

User Authentication

- ServiceNow supports multiple authentication methods, including local database authentication, single sign-on (SSO), LDAP, OAuth 2.0, digest tokens, and multi-factor authentication.

Next Steps

- The next video will focus on setting up a ServiceNow instance, enabling hands-on practice with the platform. Future videos will be more interactive, allowing viewers to apply what they've learned.

Call to Action

- Viewers are encouraged to subscribe to the channel for updates on new videos and to provide feedback in the comments section.

Video 3: ServiceNow User Interface Overview

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Introduction

The ServiceNow Platform UI serves as a web-based interface to access the Now Platform. This document is an overview of the user interface elements, essential tools, and functionalities of ServiceNow, covered in the video lesson from the ServiceNow Fundamentals Learning Path. It is structured to assist users preparing for the ServiceNow certification exam, focusing on the layout and key features of the ServiceNow UI.

Key UI Components:

1. **Banner Frame:**
    - **Location:** Runs across the top of the ServiceNow UI.
    - **Components:**
        - **Logo:** Located on the far left; clicking it returns the user to the home page.
        - **User Menu:** Found next to the logo, containing options such as Profile, Impersonate User, Elevate Roles, and Log Out.
        - **Tools:** Includes Global Search, Connect Chat, and Help.
        - **System Settings (Gear Icon):** Located at the far right, allows customization of the UI for individual users.
2. **Application Navigator:**
    - **Location:** Left sidebar, the primary navigation element.
    - **Components:**
        - **Navigation Filter:** A search bar at the top to filter applications and modules.
        - **Tabs:**
            - **All Applications:** Displays all available applications.
            - **Favorites:** Displays user-marked favorite applications or modules.
            - **History:** Lists the last 30 items the user has accessed.
3. **Content Frame:**
    - **Location:** The main workspace area of the screen, where content and modules are displayed.

Detailed Overview of Tools:

1. **User Menu:**
    - **Profile:** Modify personal settings like name, phone number, email, date format, and time zone.
    - **Impersonate User:** Allows users with the admin or impersonator role to view the UI as another user for troubleshooting.
    - **Elevate Roles:** Available only to system admins to safeguard against high-impact actions.
    - **Log Out:** Exits the current ServiceNow session.
2. **Tools Section:**
    - **Global Search:** Searches the entire instance for records matching the entered keywords.
    - **Connect Chat:** Enables real-time communication with other users within ServiceNow.
    - **Help:** Provides contextual help, access to the user guide, and a search option for documentation.
3. **System Settings:**
    - **General Settings:** Adjustments include UI compactness, keyboard shortcuts, and default homepage settings.
    - **Theme Settings:** Change the color scheme of the UI, useful for differentiating between development, test, and production instances.
    - **Accessibility Settings:** Customize accessibility features for better user interaction.
    - **List and Form Settings:** Modify the appearance and behavior of lists and forms within the UI.
    - **Notification Settings:** Manage which notifications you receive and the channels through which they are delivered.
    - **Developer Settings:** Options for setting application scope, update sets, and enabling developer tools like JavaScript log viewer.

Application Navigator:

- **Applications and Modules:**
    - **Applications:** Top-level categories in the navigator.
    - **Modules:** Specific functions within each application.

- **Separator:** A tool to group modules within an application for easier navigation.

Practical Demonstration

The video includes a practical demonstration within a personal developer instance of ServiceNow. Users are shown how to navigate the UI, utilize the Application Navigator, access and configure system settings, and effectively use the provided tools like Connect Chat and Global Search.

Conclusion

The ServiceNow UI is a comprehensive tool designed to facilitate seamless navigation and efficient work processes within the Now Platform. Understanding the layout and functionality of the UI is crucial for effective use and is essential for those preparing for the ServiceNow certification exam.

Video 4: ServiceNow Branding Overview

Introduction

This document is designed to provide a comprehensive understanding of the ServiceNow branding process as demonstrated in the video transcript. It covers the steps and concepts needed to customize the ServiceNow user interface (UI) to align with your corporate brand, making the platform feel more personalized and familiar to users.

Lesson Overview

This lesson is part of the ServiceNow Fundamentals learning path and focuses on the basics of branding within the platform. Branding in ServiceNow involves customizing the out-of-the-box UI to reflect your company's identity, including elements such as colors, fonts, and logos. The lesson includes both an overview video and a hands-on simulation exercise to help users understand the branding process.

Key Concepts

1. **What is Branding in ServiceNow?**
    - Branding in ServiceNow refers to the customization of the platform's UI to match the look and feel of your organization. This includes altering colors, fonts, logos, and other visual elements to create a consistent corporate identity across the platform. Effective branding can help in:
        - Creating a shared identity.
        - Enhancing user comfort and confidence.
        - Accelerating the adoption of the platform within your organization.

2. **Guided Setup Wizards**
    - ServiceNow provides guided setup wizards to simplify the process of configuring various aspects of the platform. These wizards are step-by-step guides that help in setting up applications and modules, making it easier for system administrators to apply the necessary configurations.
    - **ITSM and ITOM Guided Setup:**
        - **ITSM Guided Setup**: This includes wizards for setting up key ServiceNow functionalities such as incident management, problem management, and more. It also includes a specific wizard for configuring the overall look and feel of the platform, known as the Company Guided Setup.
        - **ITOM Guided Setup**: This focuses on setting up IT operations management elements like mid-servers, discovery, event management, etc.
3. **Branding Customization Steps**
    - **System Configuration**
        - The first step in the branding process involves configuring the system settings. This includes:
            - Changing the page header caption (e.g., replacing “Service Management” with your company's name).
            - Updating the browser tab title.
            - Uploading a custom banner image (e.g., your company's logo).
            - Adjusting date and time formats, banner text colors, and other UI elements to match your corporate branding.
    - **Welcome Page Configuration**
        - The welcome page is the initial screen users see when logging into the ServiceNow instance. Customizing this page allows administrators to:
            - Add a welcome message or any other relevant information for users.
            - Arrange multiple messages in a specific order to control their display priority.

- **Implementation and Application**
  - Once the desired changes are made in the guided setup, they are saved and marked as complete. These changes are then applied across the entire instance, affecting all users the next time they log in.

Summary

Branding in ServiceNow is a crucial step in making the platform resonate with your company's identity. Through the use of guided setup wizards, system administrators can easily configure the platform's look and feel, ensuring that users feel confident and comfortable using a tool that aligns with their expectations and corporate environment. This lesson provided a hands-on demonstration of the branding process, highlighting the importance of thoughtful customization to enhance user experience.

The next lesson will cover lists and filters, offering more in-depth learning compared to the basics of branding covered in this lesson.

Video 5: ServiceNow Lists and Filters

Introduction

In ServiceNow, lists are an essential component used throughout the platform to display records from database tables. These lists are found across various modules, including incidents, problems, and tasks, and are central to navigating and managing data within the platform.

List Interface Overview

The ServiceNow list interface, or list view, is a user interface page that displays records from a specific database table in a structured format. It provides tools for sorting, searching, filtering, and analyzing data efficiently. Users can select individual records from the list to view in more detail via a form view.

Accessing Lists

There are multiple ways to access lists in ServiceNow:

1. **Application Navigator:** Links to different lists can be found here. For example, selecting "Incident" under "All" will open the list interface for the incident table.
2. **Dot List Command:** By entering the name of a table followed by .list in the Application Navigator, users can directly access the list interface for that table (e.g., task.list opens the task table).

Dot List Command

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The .list command is a powerful feature that allows users to open any table's list view if they know the table name. For example:

- task.list opens the task table list.
- incident.list opens the incident table list.
- sys_user.list opens the user table list.

For users unfamiliar with table names, sys_db_object.list opens the list of all tables in the ServiceNow database.

List View Structure

The list view is organized into several components:

- **Title Bar:** Located at the top of the list view, it includes the list control menu (hamburger icon), the table name being displayed, the "New" button (if the user has permissions to create records), the search tool, and paging controls.
- **List Header:** Found just below the title bar, it includes column names and additional tools like the personalized list tool, condition builder, and column search row.
- **Data Rows and Columns:** The main section where records (rows) and their attributes (columns) are displayed.

List Control Menu

The list control menu offers various options:

- **View:** Select a saved view for the list, which includes certain filters, sorting, and fields.
- **Filter:** Apply or create filters to display specific records.
- **Group By:** Group data by any column, even those not currently displayed in the list.
- **Show:** Set the number of records displayed per page, which affects load time.
- **Refresh List:** Reload the list data.
- **Add to Favorites:** Save the current list setup (sorting, filtering, fields) as a favorite for quick access later.

List Header Tools

The list header provides tools for further customization and filtering:

- **Personalized List Tool (Gear Icon):** Allows users to add, remove, and reorder columns in the list view. Customizations are user-specific and do not affect other users.
- **Filter Icon:** Opens the condition builder, a robust tool for applying complex filters using multiple columns and operators.
- **Column Search Row:** Allows filtering by entering search terms directly into specific columns.
- **Breadcrumbs:** Display any filters applied to the list, providing a clear view of how data is being filtered.

Column Context Menu

Each column in the list view has a context menu that provides additional options:

- **Sort:** Toggle sorting by ascending or descending order for that column.
- **Visual Task Board:** Create a visual task board based on the column (available for task records).
- **Bar Chart/Pie Chart:** View data grouped by the column in chart format.
- **Configure:** Access advanced configuration options (admin role required).
- **Import/Export:** Import or export data from/to various formats.
- **Update Selected/All:** Update multiple records simultaneously.

Field Context Menu

Right-clicking on any field in a list opens the field context menu, which offers options like:

- **Show Matching:** Filter the list to show only records matching that field's value.
- **Filter Out:** Exclude records with that field's value from the list.
- **Copy URL/Sys ID:** Copy the record's URL or Sys ID to the clipboard.
- **Assign Tag:** Tag the record for further organization and filtering.

Multi-Record Actions

Checkboxes next to records allow users to select multiple records for batch actions via the "Actions on selected rows" dropdown. These actions can include updates, deletions, and more.

Preview and Form View

The information icon next to each record provides a quick preview of the record in a pop-up. To view the full details, users can click on the linked value in the first column, which opens the record in form view.

Conclusion

The ServiceNow list view is a powerful tool for managing and interacting with data within the platform. With features like the dot list command, personalized lists, and various filtering and grouping options, users can tailor their views to meet specific needs, enhancing productivity and data management capabilities.

Video 6: Forms in ServiceNow

Introduction

The video provides an overview of forms in ServiceNow, emphasizing their importance for both ServiceNow certification exams and effective usage of the platform. It aims to simplify the understanding of forms, making it easier for users to interact with records within ServiceNow.

What is a Form?

A form in ServiceNow is the interface you interact with when working with a single record. It allows users to view, change, or add data to a record stored in the ServiceNow database. Forms are accessible by either selecting a record from a list or entering the record's ID in the global search.

Standard Layout of Forms

ServiceNow forms have a standardized layout, which includes:

- **Header Bar:** Displays the record type, associated data table, and record name.
- **Main Section:** Contains fields that show the record’s attributes.
    - Required fields are marked with an asterisk.
    - Read-only fields are displayed with a gray background.
- **Additional Sections:** Used to group related fields and display related lists or formatters.

Form Field Types

Fields within a form can be of various types, such as:

- **String Fields:** Simple input elements.
- **Boolean Fields:** Displayed as checkboxes.

- **Choice Fields:** Displayed as drop-down lists.
- **Reference Fields:** Allow selecting a value from another table.
    - Users can look up and select valid entries from related tables.
    - Populated reference fields enable users to preview and open related records.

Additionally, forms may contain:

- **List Fields:** Similar to reference fields but allow multiple selections.
- **Journal Fields:** Used for entering notes, with distinctions between comments visible to customers and work notes visible only to backend users.

Saving Changes on Forms

Changes on a form are not automatically saved. Users must proactively save changes through:

- **Submit or Update:** Saves changes and closes the form. "Submit" is used for new records, while "Update" is for existing records.
- **Save:** Saves changes but keeps the form open.
- **Insert / Insert & Stay:** Allows creating a new record by copying values from an existing one.

Form Sections

Forms are built using sections that organize fields and data. Users can choose between a tabbed format or expandable/collapsible containers for displaying these sections. This preference is user-specific and can be set in the display settings.

Related Lists & Formatters

- **Related Lists:** Display records from other tables that are related to the current record.
- **Formatters:** Display additional information not contained in fields or related lists, such as activity history.

Form Views

Form views allow different users to view the same record in different formats based on their needs. Users can switch views via the form’s context menu. The default view does not display a name in the header bar, while other views do.

Form Personalization

Users can personalize forms by toggling the display of specific fields through the form personalization tool. These changes are specific to the user and do not affect other users.

Adding Attachments

Users can attach files to a record using the manage attachments button on the form's header bar. This is useful for including additional documentation, such as screenshots.

Form Templates

Templates in ServiceNow allow users to automate the population of certain fields when creating new records. Users can create and manage templates through the template bar. If a template is named the same as the table it applies to, it will be automatically applied when creating a new record of that type.

Creating & Editing Views

ServiceNow provides two tools for creating and editing form views:

- **Form Design Tool:** A more sophisticated, drag-and-drop interface for adding, removing, and rearranging fields and sections.
- **Form Layout Tool:** A simpler, traditional method for managing form views.

Conclusion

The video concludes by encouraging viewers to experiment with the discussed features using their ServiceNow personal developer instance. The importance of simplicity and continuous learning is emphasized, with an invitation to watch the next video in the series.

Video 7: A Hands-on ServiceNow Tool Demo

Introduction

- Cloud-based platform providing IT services and applications
- Accessible via specific URLs for each company's instance
- Multiple instances available (Production, Test, Development)

User Interface

- Main interface: Next Experience UI
- Other interfaces: Mobile apps, Service Portal, Employee Center
- Navigation bar features: User menu, notifications, contextual help, global search, etc.

Applications Overview

- Organized into four main workflows: IT, Employee, Customer, and Creator
- Extensive list of out-of-the-box applications
- ServiceNow Store for additional applications
- Certification options available for various application areas

Working with Lists and Forms

- Lists: Display multiple records from database tables
- Forms: Display single records for viewing and editing
- Features include filtering, sorting, grouping, and personalization
- Context menus provide additional functionality

Knowledge Management

- Knowledge bases store articles and documentation
- Categorized for easy navigation
- Search functionality across all knowledge bases
- Collaborative features like ratings, comments, and flagging

ServiceNow Database

- Single, enterprise-wide database for all applications
- Nearly 5,000 tables
- Ability to create custom tables and applications
- Built around the Configuration Management Database (CMDB)

Personal Developer Instance

- Available through ServiceNow developer program
- Allows hands-on experience with the platform

Video 8: Introduction to Importing Data in ServiceNow

Introduction

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This document provides an overview of the process for setting up and executing a standard data import in ServiceNow. The focus is on understanding the key components involved in the import process, including data sources, import sets, transform maps, field maps, and scheduling data imports. The explanation begins with basic terminology that will be used throughout the series.

Key Terminology:

1. **Source Data Entity:**
    - This refers to the original data that you intend to import into ServiceNow. It could be data from an external database, a file, or another application.
2. **Target Data Entity:**
    - This is the destination within ServiceNow where the imported data will eventually reside. It could be any table or data structure within the ServiceNow environment.
3. **Staging Table (Import Set Table):**
    - ServiceNow introduces an intermediary data entity known as the "Import Set Table," which the author refers to as the "Staging Table." This table acts as a temporary holding area for the data being imported before it is mapped and transferred to the final target table in ServiceNow.

Process Overview:

1. **Source Data:**
    - The process begins with identifying the source data that needs to be imported. This is the data that resides outside ServiceNow and will be brought into the system.
2. **Staging Table (Import Set Table):**
    - When the import process is initiated, ServiceNow automatically creates a staging table (Import Set Table) to temporarily store the incoming data. This step occurs between the source data and the target data entity.
3. **Target Data Store:**
    - After the data is staged in the staging table, it is then mapped and moved to the target data store within ServiceNow. This is the final destination where the data will be used and accessed within the system.

Next Steps:

- The first step in setting up a data import in ServiceNow is to create a **Data Source**. This component defines where the source data is coming from and how it will be brought into ServiceNow. The process of setting up a data source will be covered in the next note.

Conclusion:

Understanding the roles of the source data, staging table (Import Set Table), and target data store is crucial for effectively managing data imports in ServiceNow. The introduction of a staging table simplifies the process by providing a controlled environment for data before it is finalized in the target table. This understanding will form the foundation for more complex operations discussed in subsequent notes.

Video 9: Creating a Data Source in ServiceNow

Introduction

This document outlines the process of creating a data source in ServiceNow, which is the first crucial step in setting up a data import. A data source defines the origin of the data you intend to import, specifying how ServiceNow connects to the source and what data will be brought into the system. This is a continuation of our exploration of ServiceNow's data import process, following the initial discussion on the basics of data entities and the staging table (also known as the Import Set Table).

Key Terminology Recap:

- **Source Data Entity:** The external data that you want to import into ServiceNow.
- **Target Data Entity:** The final destination in ServiceNow where the data will be stored.
- **Staging Table (Import Set Table):** A temporary table created by ServiceNow to hold the data before it is mapped to the target table.

Creating a Data Source:

1. **Purpose of a Data Source:**
    - A data source in ServiceNow is essentially a record that stores all the necessary parameters to identify, locate, and connect to the source data. It also defines how the staging table should be created and named.
2. **Steps to Create a Data Source:**
    - **Navigating to Data Sources:**

        - Access the data source table by entering "sys_data_source.list" in the application navigator or by navigating through "System Import Sets > Administration > Data Sources" in the application navigator.
    - **Creating a New Data Source:**
        - Click on the "New" button to create a new data source record.
        - **Name the Data Source:** Provide a name for the data source, e.g., "Test Import."
        - **Set Staging Table Details:** Define the label and name of the staging table. The label is a user-friendly name, while the name (e.g., "u_test_import") is the actual table name used by the system.
    - **Selecting Data Source Type:**
        - Choose the type of data source (e.g., file, JDBC, LDAP, REST). For instance, selecting "JDBC" would require additional details such as database type, server name, port, and credentials.
    - **Example: File Data Source:**
        - If the data source is a file, select the file format (e.g., Excel, CSV).
        - Specify details like sheet number and header row for Excel files.
        - For simplicity, use "Attachment" as the file retrieval method and attach the file directly to the data source record.
    - **Submit the Data Source:**
        - After providing all necessary details, save or submit the data source record. This action stores the connection parameters and sets up the staging table based on the provided configurations.
3. **Viewing Data Source Records:**
    - After submission, the data source record is visible in the data source table. This record now contains all the information needed for ServiceNow to connect to the source and import data.

Practical Example:

- **Sample Data Source:**
    - A simple Excel file with columns like "Name," "Address," "City," "State," and "ZIP" is used as a sample data source. When the data import is initiated, ServiceNow will create fields in the staging table corresponding to these columns.

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Conclusion

Creating a data source in ServiceNow is a fundamental step in the data import process. It involves defining how ServiceNow connects to the external data source and setting up the staging table. This process is the foundation for subsequent steps, such as running test imports, mapping data, and ultimately loading data into the target table. The next step in this series will involve executing a test import and exploring the behavior of import sets and the staging table during the import process.

Video 10: Import Sets in ServiceNow

This video content on managing the staging table in ServiceNow, focusing on the data import process. It outlines the steps involved in setting up a data source, running an import, and understanding how the staging table (import set table) functions within the ServiceNow platform.

Key Concepts

1. **Data Source Creation**:
    - In the previous session, a data source record was created to define the source of data for ServiceNow imports.
    - The data source specifies what data to pull and the parameters for creating the staging table, including the table name and label.
2. **Staging Table (Import Set Table)**:
    - When a data import is initiated, ServiceNow automatically creates a staging table based on the parameters defined in the data source record.
    - The staging table is a temporary table where the imported data is stored before it is moved to the final target table.
3. **Testing the Data Source**:
    - Testing the data source is essential to ensure that the connection works, the staging table is created correctly, and data is loaded as expected.
    - The video demonstrates how to verify the creation of the staging table by attempting to view its contents before and after running the import.
4. **Import Process**:
    - Running the import triggers ServiceNow to check if the staging table exists; if not, it creates the table based on the data source parameters.

- After creation, the data is imported into the staging table, and a confirmation message is displayed showing the number of records processed.

5. **Staging Table Structure**:
    - The staging table structure includes custom columns that reflect the headers from the source data (e.g., Address, City, State, Zip).
    - The table layout can be viewed and configured to confirm that it matches the specified structure.
6. **Managing Import Runs**:
    - Multiple import runs can load data into the staging table multiple times. Each run is tracked using the "Import Set" table, which manages records based on their import runs.
    - The staging table records are linked to their respective import runs using a reference in the "Set" column.
7. **Understanding the Import Set Table**:
    - The "Import Set" table is an out-of-the-box ServiceNow table that tracks each import run.
    - Records in the staging table are grouped by their corresponding import run, allowing users to manage and differentiate data based on when it was imported.

Next Steps

The next step in the import process involves configuring ServiceNow to move data from the staging table into the final target table. This will be covered in the following video.

Video 11: ServiceNow Transform Maps & Field Maps

This video is part of a series on importing data into ServiceNow. The series walks through the process of setting up data imports, focusing on the steps required to move data from a source into a ServiceNow target table using a staging table, transform maps, and field maps.

Key Concepts and Definitions

1. **Data Source:**
    - A data source in ServiceNow defines the external data entity that you want to import. This includes specifying the type of data, how to connect to it, and what data should be imported.

- The staging table is an intermediate table where the imported data is temporarily stored before it is moved to the final destination table.

2. **Staging Table:**
    - A temporary table that holds the data imported from the data source. It allows you to review and test the data before it is moved to the final destination.
3. **Transform Map:**
    - A transform map is a record in ServiceNow that defines how data should be moved from the staging table to the target table. It acts as a grouping mechanism for field maps.
    - Stored in the sys_transform_map table, transform maps are used to manage and execute data transformations.
4. **Field Map:**
    - Field maps are individual mappings that define how a specific field in the staging table corresponds to a field in the target table.
    - Each field map is stored in the sys_transform_entry table in ServiceNow.
5. **Coalesce:**
    - Coalescing is used during data import to determine if a record already exists in the target table, which helps prevent the insertion of duplicate records.
    - It involves specifying one or more fields that ServiceNow uses to check for existing records. If a match is found, the existing record is updated instead of creating a new one.

Steps in the Process

1. **Creating the Data Source:**
    - Set up the data source by specifying the source data entity, connection details, and the staging table where data will be temporarily stored.
2. **Testing the Data Source:**
    - Test the connection to ensure that ServiceNow can connect to the data source, create the staging table, and import data successfully.
3. **Setting Up Transform Maps:**

   - Create a new transform map record in the sys_transform_map table. This record will group together all field maps.
   - Specify the source table (staging table) and the target table where the data will eventually reside.

4. **Defining Field Maps:**
   - Use the Mapping Assist tool to create individual field maps, which map fields from the staging table to the corresponding fields in the target table.
5. **Setting Coalesce Fields:**
   - Choose a field or fields that will act as the coalesce fields to prevent duplicates. In this example, the Name field is used, though it may not be ideal for all scenarios.
6. **Testing the Import:**
   - After setting up the transform map and field maps, test the import process to ensure that data flows correctly from the source through the staging table to the target table.

Conclusion

This video covers the process of setting up and executing data imports in ServiceNow, including the creation of data sources, staging tables, transform maps, and field maps. The next steps involve testing the entire import process and learning how to schedule imports for recurring data transfers.

Video 12: ServiceNow Incident Management Tutorial and Task Administration

Introduction

- ServiceNow is a platform designed to streamline organizational workflows, making work processes as efficient as possible.
- Task management is a primary function of ServiceNow, and the "Task Table" is a core component of the platform, which stores records representing tasks that need to be completed.

Series Overview

- This video is part of a larger series focused on helping viewers understand ServiceNow, particularly those preparing for the Certified System Administrator (CSA) exam.

- The series repackages information from ServiceNow's Fundamentals Learning Path into simpler, more digestible content, spread across 27 videos.

What is a Task in ServiceNow?

- A task in the real world is simply a piece of work that needs to be done. In ServiceNow, a task is a database record that represents this work.
- Tasks can be managed through the "Task Table," which contains common attributes such as description, status, due date, and the responsible party.

Types of Tasks in ServiceNow

- Common types of tasks include Incident, Problem, and Change Request. These are stored in the database using a hierarchical structure.
- The Incident, Problem, and Change Request tables extend the Task Table, inheriting common attributes but also adding task-specific attributes.
- Tasks are created through these extended tables, not directly in the Task Table.

ServiceNow Task Management Overview

- ServiceNow's task management capabilities allow for the creation of repeatable processes, making task completion efficient and organized.
- Key features include:
    - **Assignment Rules**: Automatically assign tasks to appropriate users or groups.
    - **Approvals**: Manage task approvals manually or automatically.
    - **Service Level Agreements (SLAs)**: Track task completion times.
    - **Inactivity Monitors**: Notify users when tasks are not updated within a certain timeframe.
    - **Workflows**: Automate processes based on specific conditions.

Task Assignment Rules

- Tasks can be assigned to individual users or groups using fields in the task record.
- Assignment rules automate this process by populating the "Assigned to" and "Assignment Group" fields based on set conditions.
- Assignment rules are stored in the "CIS Rule Assignment" table and are prioritized by execution order.

Creating an Assignment Rule (Demo)

- A new assignment rule can be created to automatically assign tasks to specific users or groups when conditions are met.
- Example: Assign all hardware-related incidents to a specific user and group.
- The rule's execution order can be set to ensure it is checked first when applicable conditions arise.

Assignment Lookup Rules

- Assignment Lookup Rules are an older, less powerful method for assigning tasks, applicable only to Incident tasks.
- They have limited field options for setting conditions and are generally less flexible than standard Assignment Rules.

Accessing and Working on Tasks

- Tasks can be accessed via the Service Desk application, where users can view tasks assigned to them or their groups.
- Tools like "My Work" and "My Group's Work" help users manage their tasks and assignments.

Task Collaboration Tools

- ServiceNow includes tools to facilitate collaboration, allowing multiple users to work on tasks simultaneously.
- **User Presence**: Displays when multiple users are viewing the same record.
- **Real-Time Editing**: Shows updates to records as they happen, helping teams work together more efficiently.
- **Activity Streams**: Track changes and updates made to tasks, serving as an audit log.

Visual Task Boards

- Visual Task Boards provide a graphical interface for managing tasks, offering a more visual approach compared to lists.
- Components include cards representing tasks and lanes representing categories or statuses.
- Types of boards:
    - **Guided Boards**: Created from lists with predefined field values, where dragging cards between lanes changes task attributes.

- **Flexible Boards**: Created from lists without predefined values, allowing for more custom lane names without changing task attributes.
- **Freeform Boards**: Independent boards not tied to specific tasks, used for personal organization.

Conclusion

- The video wraps up the lesson on ServiceNow task management, previewing the next lesson on notifications.
- Viewers are encouraged to subscribe for more content and provide feedback.

Video 13: ServiceNow Reporting Tutorial

Introduction

- The video is part of a series aimed at teaching how to become an expert in using and administering the ServiceNow platform. The focus of this episode is on ServiceNow's reporting capabilities, essential for both the Certified System Administrator (CSA) exam and practical application in the platform.

Key Concepts

- **Data-Driven Analysis and Learning:** The video emphasizes understanding ServiceNow by analyzing the underlying data. Almost everything seen in ServiceNow is a record in a database table.
- **Reporting in ServiceNow:** Reporting is presented as a critical function, allowing users to create, manage, and present data effectively. The video breaks down the components and processes involved in creating and managing reports in ServiceNow.

Data Model Overview

- **Sys Report Table:** The central table storing all report records. Each report created or viewed in ServiceNow corresponds to a record in this table.
- **Supporting Tables:**
  - **Report Source Table:** Stores reusable saved queries that populate reports.
  - **Scheduled Email of Reports Table:** Manages the scheduling and automated emailing of reports.
  - **Report Users and Groups Table:** Controls sharing of reports with specific users or groups.

- **Dashboard Table:** Allows for adding reports to dashboards for broader visibility.

Creating and Managing Reports

- **Fields in the Report Table:**
  - **SysID:** Unique identifier for each report.
  - **Title:** The name of the report, visible in the UI.
  - **Source Type & Report Source:** Determines whether the data is pulled from a table or a saved query.
  - **Table & Field Name:** Specifies the data source and grouping criteria for the report.
  - **Filter:** Defines conditions for narrowing down the data in the report.
  - **Type:** Determines the visualization method for the report (e.g., pie chart, bar chart).
- **Commonly Used Report Fields:** The video highlights eight key fields frequently used when creating reports and discusses how to populate these fields during report creation.

Steps to Create a New Report

- **Three Methods for Report Creation:**
  1. **Reports Application - Create New Module:** Standard method for creating new reports.
  2. **ServiceNow Studio:** Allows report creation within a specific application scope.
  3. **From Existing List View:** Initiate report creation directly from data being viewed in a list.

Scheduling Reports

- **Scheduled Reports:** ServiceNow allows reports to be scheduled for automated execution and email distribution.
- **Scheduling Process:** Involves inserting a record into the sys_auto_report table, specifying details like the report, users, groups, email addresses, timing, and conditions.

Sharing Reports

- **Report Sharing:** Users can share reports with other platform users or groups for on-demand execution. This involves creating records in the sys_report_users_groups table.
- **Sharing Process:** Accessible via the sharing icon in the report view, allowing global, role-based, or individual sharing.

Adding Reports to Dashboards

- **Dashboards:** Dashboards in ServiceNow are versatile tools for displaying multiple reports and widgets in one place.
- **Adding Reports to Dashboards:** Can be done directly from the report view, adding the report to a specific dashboard and tab.

Conclusion

- The video is a comprehensive guide to understanding and utilizing ServiceNow's reporting functionalities. It covers the underlying data model, key tables, fields, and practical steps for creating, managing, and sharing reports effectively within the platform.

Video 14: What is Low Code No Code Development?

This document provides a detailed summary and analysis of a video discussing the concept of low code/no code software development. The video, titled "Tear Down That Wall: A Journey to Low Code No Code," is a ServiceNow production aimed at explaining how low code/no code approaches are revolutionizing the IT landscape, enabling business users to participate more directly in software development processes.

Key Concepts and Characters

1. **Traditional Software Development**:
    - **Savvy Business Person**: Represents business stakeholders like marketing experts, sales professionals, and support specialists who have deep business knowledge but limited technical skills. They are focused on cutting costs, increasing productivity, and driving digital transformation.
    - **IT Superstar**: Symbolizes technical experts with extensive training in coding and system design. They possess advanced knowledge of databases, programming languages, and system architecture, but often struggle to communicate in simple, business-friendly terms.
    - **The Wall**: The metaphorical barrier that separates business needs from IT solutions. It represents the communication and process gaps that exist in traditional software development, leading to frustration and inefficiency.

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2. **The Traditional Development Process**:
    - The video outlines the typical flow in traditional software development: the business person comes up with an idea, documents the requirements, and passes them to IT. IT then designs and develops the solution, but the process often leads to back-and-forth exchanges due to mismatched expectations. This iterative process, characterized by misunderstandings and revisions, is symbolized by "tossing things over the wall."
3. **Low Code No Code Approach**:
    - **Low Code No Code**: The hero of the story who breaks down the barriers between business and IT. This approach provides business users with intuitive tools that allow them to build and deploy applications without needing deep technical knowledge. It empowers non-technical users to create solutions directly, reducing reliance on IT for every software need.
    - The video highlights the advantages of low code/no code: faster development cycles, reduced costs, and enhanced business agility. It also acknowledges the limitations, such as reduced flexibility and the potential for less optimal code since users rely on pre-built components.
4. **ServiceNow's Low Code No Code Tools**:
    - **App Engine Studio**: A tool that offers a guided experience for creating applications with low code/no code, allowing deeper configuration when necessary.
    - **Now Experience UI Builder**: A drag-and-drop interface for building workspaces and portals.
    - **Flow Designer**: A tool that automates workflows using natural language, making it easier for business users to manage processes.
    - **CMDB (Configuration Management Database)**: Although not a low code/no code tool per se, it underpins many low code/no code applications by providing a framework of IT configuration data.
5. **Pros and Cons**:
    - **Pros**: Increased agility, faster time to market, lower development costs, and greater automation.
    - **Cons**: Limited flexibility, potential constraints due to reliance on pre-built components, and the continued presence of underlying code.
6. **Career Opportunities**:

- The video encourages business users to leverage low code/no code tools creatively and to learn more about technology. For IT professionals, the message is to adapt by learning more about the business side and finding ways to integrate their technical expertise with business needs. It reassures developers that their roles remain essential but advises them to focus on higher-value tasks and support business users in leveraging new tools.

Conclusion

The video provides an engaging overview of how low code/no code tools are transforming the software development landscape, particularly within ServiceNow's ecosystem. It encourages collaboration between business and IT, reducing the traditional gaps that have hindered efficient software development. By adopting low code/no code, businesses can accelerate their digital transformation efforts while still relying on IT professionals for more complex tasks and guidance.