



PIE Tech

POLLACHI INSTITUTE OF ENGINEERING AND TECHNOLOGY

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sky is the limit

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ServiceNow Administrator Project

AUTOMATING DATA POPULATION IN SERVICENOW: STREAMLINING PROGRAM MANAGEMENT

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AUTOMATING DATA POPULATION IN SERVICENOW: STREAMLINING PROGRAM MANAGEMENT

ABSTRACT :

USER STORY :

As an IT administrator at a company using ServiceNow, you have been tasked with setting up a data lookup mechanism. This mechanism will help automatically populate certain fields in a custom table called "Program" based on predefined values in another table called "testing lookups". The "Program" table includes fields for technology, tracker, and trainer. The "testing lookups" table contains the same fields and will provide the values used for the lookup.

PRE-REQUISITES :

1. Knowledge on: Applications, Tables, Fields.
2. Knowledge on: Data lookup Definitions.

SKILLS USED TO SOLVE THE PROBLEM STATEMENT :

1. Service Now Administration.

TWO MAJOR METHOD :

- Implementation
- Result

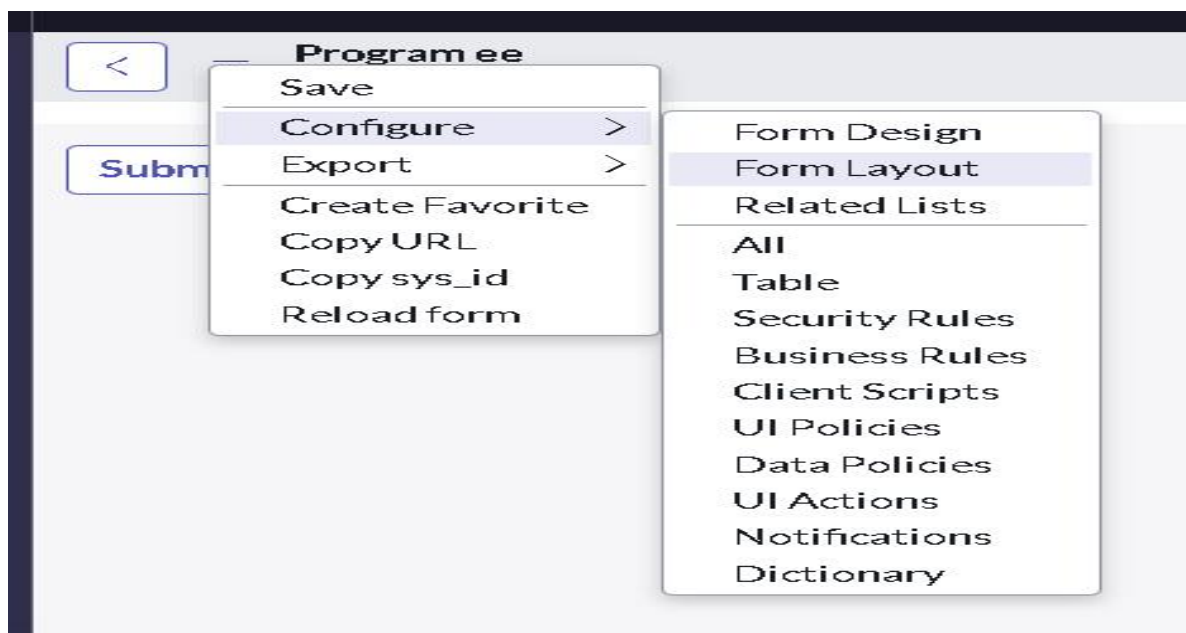
IMPLEMENTATION:

Step 1 : Creating Custom Table

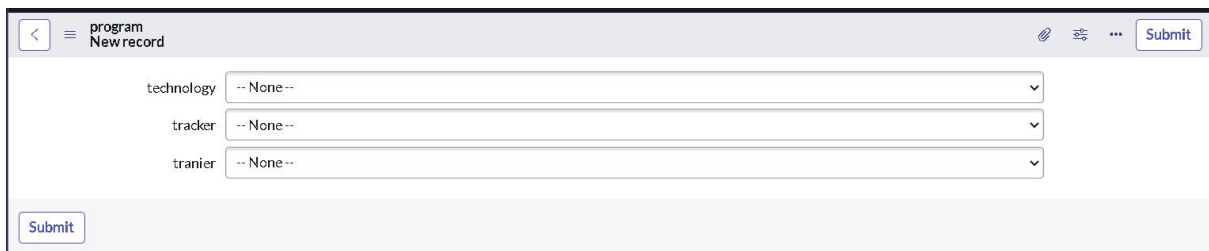
1. Open "Tables" >> New.
2. Give the label name as " program ".
3. Click on Submit

The screenshot shows the ServiceNow 'Table - Program' configuration page. The browser address bar displays a URL from dev199400.service-now.com. The page header includes the ServiceNow logo and navigation tabs like 'All', 'Favorites', 'History', and 'Workspaces'. Below the header, there's a section titled 'Table - Program' with a search bar and buttons for 'Delete', 'Update', and 'Delete All Records'. A descriptive text box explains that a table is a collection of records in the database. Below this, there are input fields for 'Label' (set to 'Program') and 'Name' (set to 'u_program'). To the right, there are dropdown menus for 'Application' (set to 'Global'), 'Technology' (set to '-- None --'), 'Tracker' (set to '-- None --'), and 'Trainer' (set to '-- None --').

4. Click on new to open record, click on the Additional Actions and go to configure >> select Form Layout



5. Create fields as
 - a. Name : Technology
 - b. Type : choice
6. Click on Add
7. And follow the same instructions
8. For two more fields are
 - a. Tracker
 - b. Trainer
9. Add them and click on save



The screenshot shows a web interface for creating a new record in a 'program' table. The header bar includes a back arrow, a hamburger menu, the text 'program New record', and icons for edit, refresh, and a 'Submit' button. The form contains three dropdown menus labeled 'technology', 'tracker', and 'tranier', each with '-- None --' selected. A 'Submit' button is located at the bottom left of the form area.

10. Now right click on “ technology ” field click on Configure Choices.
11. Enter the item as “ Salesforce ” and click on Add.
12. Add two more items
 - a. ServiceNow
 - b. Testing
13. Click on save.

< Configuring Technology Choices

tailoring: sys_db_object.u_technology
Table

Available		Selected
	Add	Salesforce
	Remove	ServiceNow
		Testing

Move up
Move down

Save Cancel

Enter new item: Add

14. Follow the same steps from 9 to 13 for remaining two fields.
15. Tracker values are:
 - a. Admin
 - b. Developer
16. Trainer values are:
 - a. Rakesh
 - b. Tarakesh
 - c. Ajay
 - d. Phani
 - e. Shivam
17. Click on save.

Step 2 : Creating a custom matcher table.

1. Open "Tables" >> New.
2. Give the label name as "testing lookup".
3. Add "Matcher Field Definition" in the Extends table field.
4. Click on Submit.

Table
testing lookup

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: testing lookup

* Name: u_testing_lookup

Extends table: Matcher Field Definitions

Application: Global

Technology: -- None --

Tracker: -- None --

Trainer: -- None --

5. Follow the same steps from 4 to 17 from “ step - 1 ”.
6. And add another field from the Form Layout that is “ order ”.
7. Click on save.

Step 3 : Create records in matcher table

1. Follow the below figure to create a record.

Table
testing lookup

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: testing lookup

* Name: u_testing_lookup

Extends table: Matcher Field Definitions

Application: Global

Technology: -- None --

Tracker: -- None --

Trainer: -- None --

Technology: -- None --

Tracker: -- None --

Trainer: -- None --

order: -- None --

2. Follow the figure to create more records as shown in below figure.

processes [More Info](#)

* Label

* Name

Extends table

Application

Technology

Tracker

Trainer

Technology

Tracker

Trainer

order

Technology

Tracker

Trainer

Technology

Tracker

Step 4 : Create Data Lookup Definition to automate the trainer

1. Search for Data Lookup Definition in All navigation.
2. Click on new.
3. Give name as “ program data lookup ”
4. Select the source table as “ program ”.
5. Select the matcher table as “ testing lookup ”.
6. Click on submit.

< Data Lookup Definitions
New record

* Name

* Source Table

* Matcher Table

Application

Active ☒

Run on form change ☒

Run on insert ☒

Run on update ☐

Submit

7. Again open the “ program data lookup ” record.
8. Scroll down under matcher field definitions and click on new.
9. Select the source table field : technology
10. And select the matcher table field : technology

11. Exact lookup match : checked.
12. Click on Submit.

Matcher Field Definitions
New record

Data Lookup: program data lookup

Application: Global

* Source table field: technology

* Matcher table field: technology

Exact lookup match: ☒

Submit

13. And create another Matcher field definitions for another field : tracker
14. Click on Setter field definition and click on new
15. Select the source table field : tranier
16. And select the matcher table field : tranier
17. Always replace the field : checked.
18. Click on Submit.

Setter Field Definitions
New record

Data Lookup: program data lookup

Application: Global

* Source table field: tranier

* Matcher table field: tranier

Always replace: ☒

Submit

19. Click on update.

Data Lookup Definitions
program data lookup

* Name: Application: ⓘ

* Source Table: Active: ☒

* Matcher Table: Run on form change: ☒

Run on insert: ☒ Run on update: ☐

Matcher Field Definitions (2) **Setter Field Definitions (1)**

for text Search ⓘ Actions on selected rows...

Data Lookup = program data lookup

<input type="checkbox"/>	Source table field	Matcher table field	Exact lookup match
<input type="checkbox"/>	u_tracker	u_tracker	false
<input type="checkbox"/>	u_technology	u_technology	true

1 to 2 of 2

RESULT :

1. Go to the source table “ program ”.
2. Click on new .
3. Select any technology and tracker .
4. To check the trainer is automatically assigned to it.

program
New record

technology:

tracker:

tranier:

CONCLUSION:

The automation of data population in ServiceNow significantly enhances the efficiency and effectiveness of program management. By eliminating manual data entry, organizations can reduce human error, save time, and improve the accuracy of critical information. Automation also fosters real-time data integration, allowing program managers to make more informed decisions based on up-to-date insights.

Moreover, streamlining the process through automated data population empowers teams to focus on higher-value activities, such as strategic planning and proactive issue resolution, rather than time-consuming administrative tasks. This leads to improved collaboration, faster response times, and a more agile program management environment.

Ultimately, automating data population in ServiceNow not only boosts operational productivity but also contributes to overall program success, enabling organizations to deliver projects on time, within scope, and with greater alignment to business goals. As companies continue to embrace digital transformation, such automation will remain a critical enabler of seamless program management in the future.