

# Automating Employee Data Import

## Problem Statement:

Your organization wants to regularly import a list of new employees with their details, such as Name, Email, Department, and Manager, from an external system. Once imported, when an Incident is assigned to an employee, the Incident form should automatically show the manager's email of the employee's department. However, the Priority field on the Incident should default to a different value from the other child tables of the Task table

## Objective:

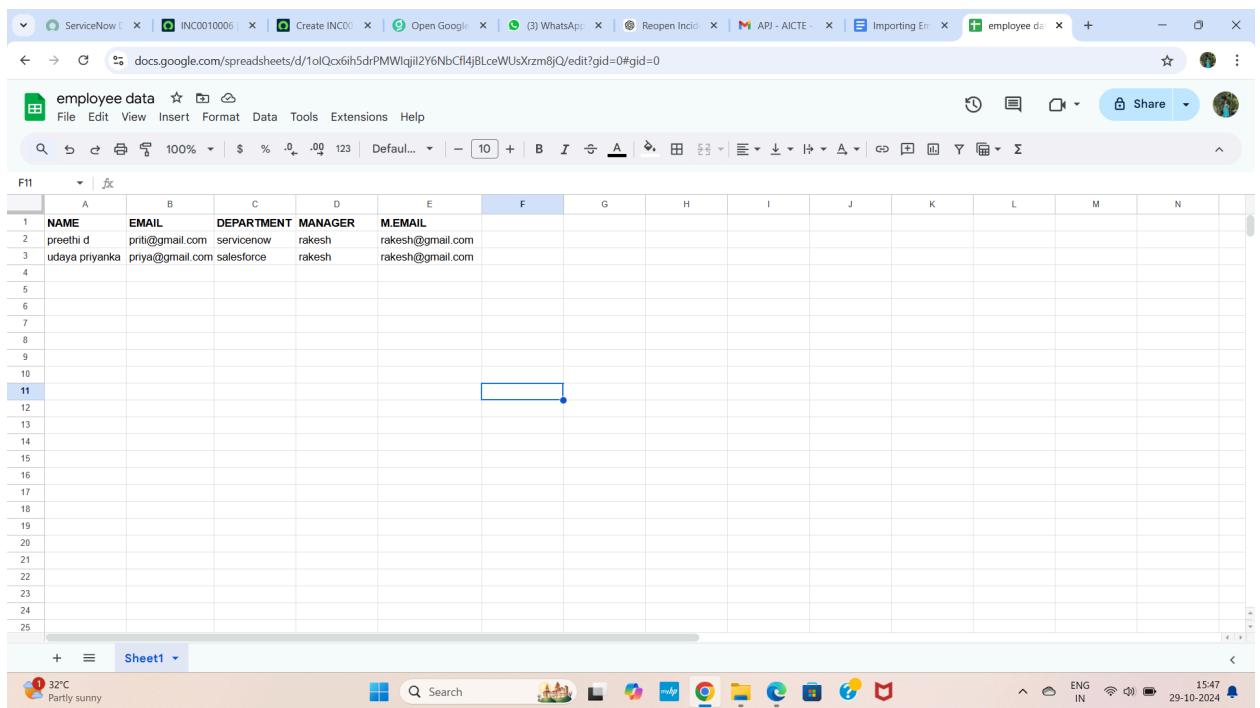
The objective of this scenario is to automate the import of employee data, display department manager information directly on incidents, and set a custom priority default for incidents to improve data accuracy, provide quick access to relevant information, and streamline the incident resolution process in ServiceNow.

## TASK INITIATION

### Milestone 1 : Import data from data source

#### Activity 1: Create records in the Sheet

1. Open google sheet
2. Name the fields as name,email,department manager and manager's email
3. Enter some records
4. Save the sheet as: employee data
5. Download the file as .xlsx , .csv (or) .xml file

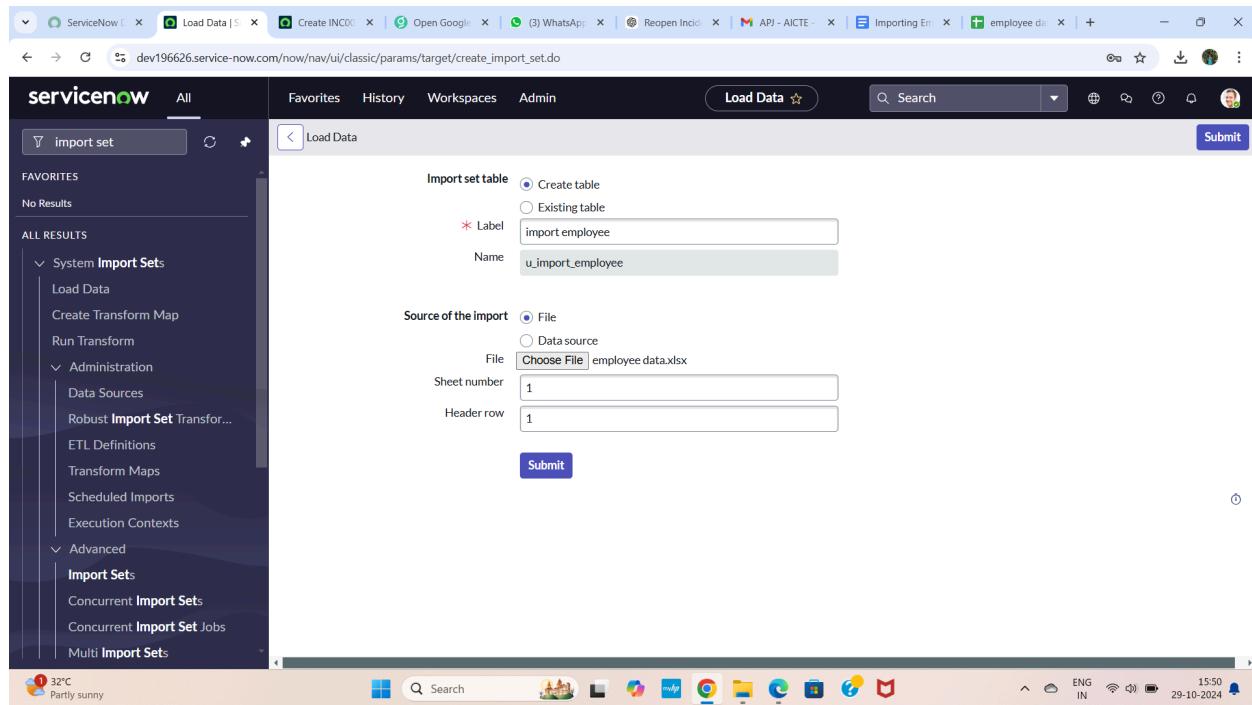


The screenshot shows a Google Sheets document titled "employee data". The spreadsheet has a single sheet named "Sheet1". The data is organized into columns labeled NAME, EMAIL, DEPARTMENT, MANAGER, and MEMAIL. The rows contain the following data:

	NAME	EMAIL	DEPARTMENT	MANAGER	MEMAIL
1	preethi d	pritij@gmail.com	servicenow	rakesh	rakesh@gmail.com
2	udaya priyanka	priye@gmail.com	salesforce	rakesh	rakesh@gmail.com
3					
4					
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## Activity 2: Import data

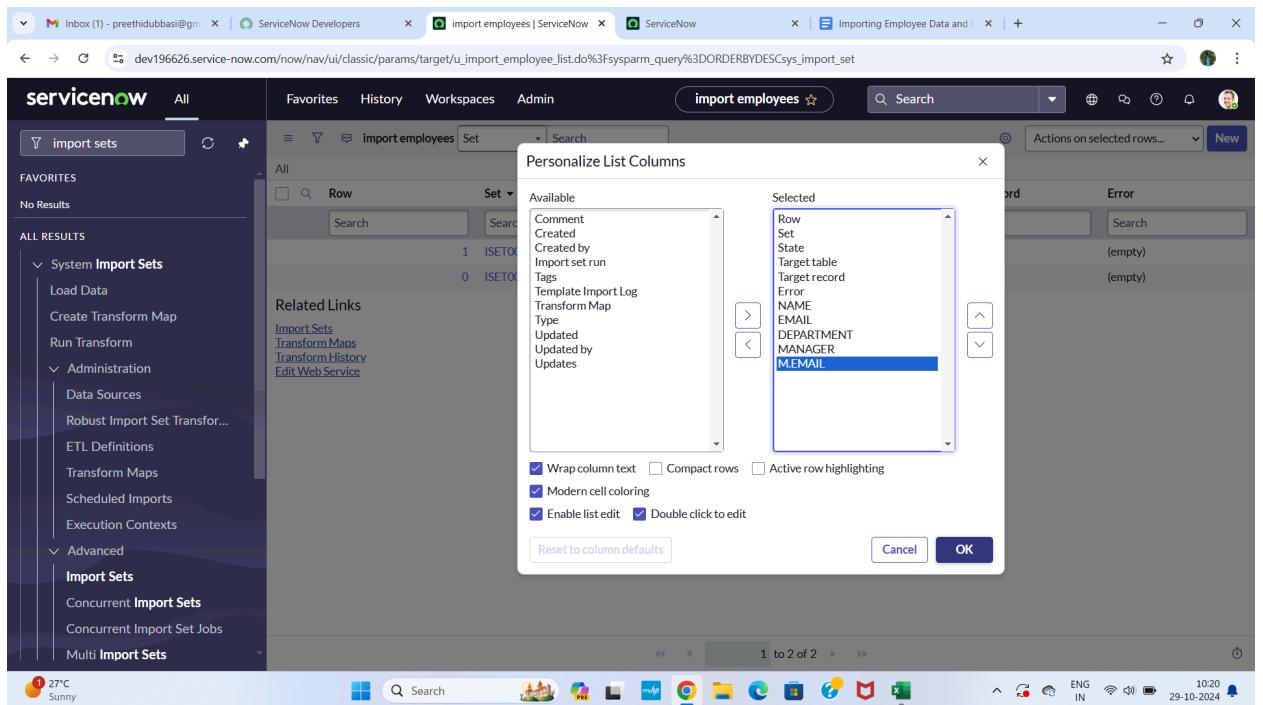
1. Open service now.
2. Click on All >> search for import sets
3. Select load data under system import sets
4. select create table
5. Give the the import set table name as: import employee
6. Choose the file which we created in the XL sheet.



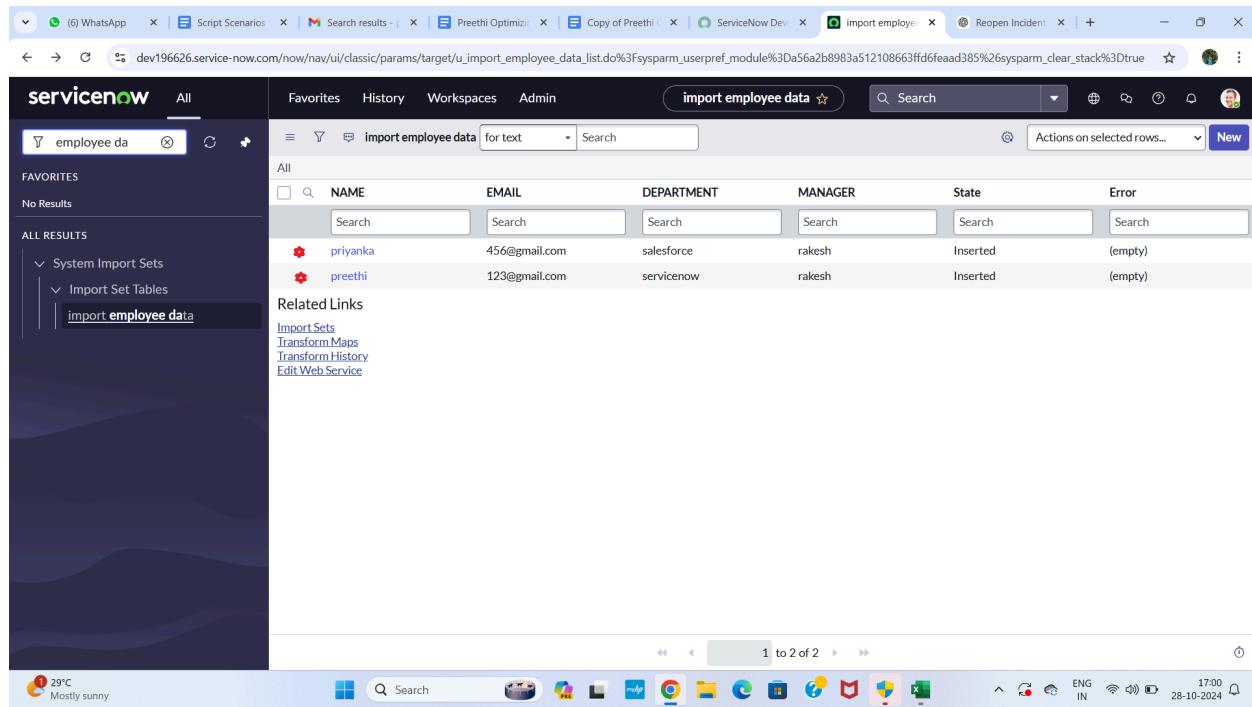
The screenshot shows the ServiceNow Load Data interface. On the left, the navigation bar includes 'Import set' under 'FAVORITES' and 'System Import Sets' under 'ALL RESULTS'. The main panel displays the 'Load Data' configuration page. Under 'Import set table', 'Create table' is selected, and the 'Label' field is set to 'import employee'. The 'Name' field is set to 'u\_import\_employee'. Under 'Source of the import', 'File' is selected, and a file named 'employee data.xlsx' is chosen. The 'Sheet number' is set to 1, and the 'Header row' is also set to 1. A 'Submit' button is visible at the bottom right.

7.The data is imported,click on personalized list

8.Add fields to the form.



The screenshot shows the ServiceNow interface with a 'Personalize List Columns' dialog box open over a list view titled 'import employees'. The dialog box has two columns: 'Available' and 'Selected'. In the 'Available' column, items like 'Comment', 'Created', 'Created by', 'Import set run', 'Tags', 'Template Import Log', 'Transform Map', 'Type', 'Updated', 'Updated by', and 'Updates' are listed. In the 'Selected' column, 'Row', 'Set', 'State', 'Target table', 'Target record', 'Error', 'NAME', 'EMAIL', 'DEPARTMENT', 'MANAGER', and 'M.EMAIL' are selected. At the bottom of the dialog box, there are checkboxes for 'Wrap column text', 'Compact rows', 'Active row highlighting', 'Modern cell coloring', 'Enable list edit', and 'Double click to edit'. Buttons for 'Reset to column defaults', 'Cancel', and 'OK' are at the bottom right.



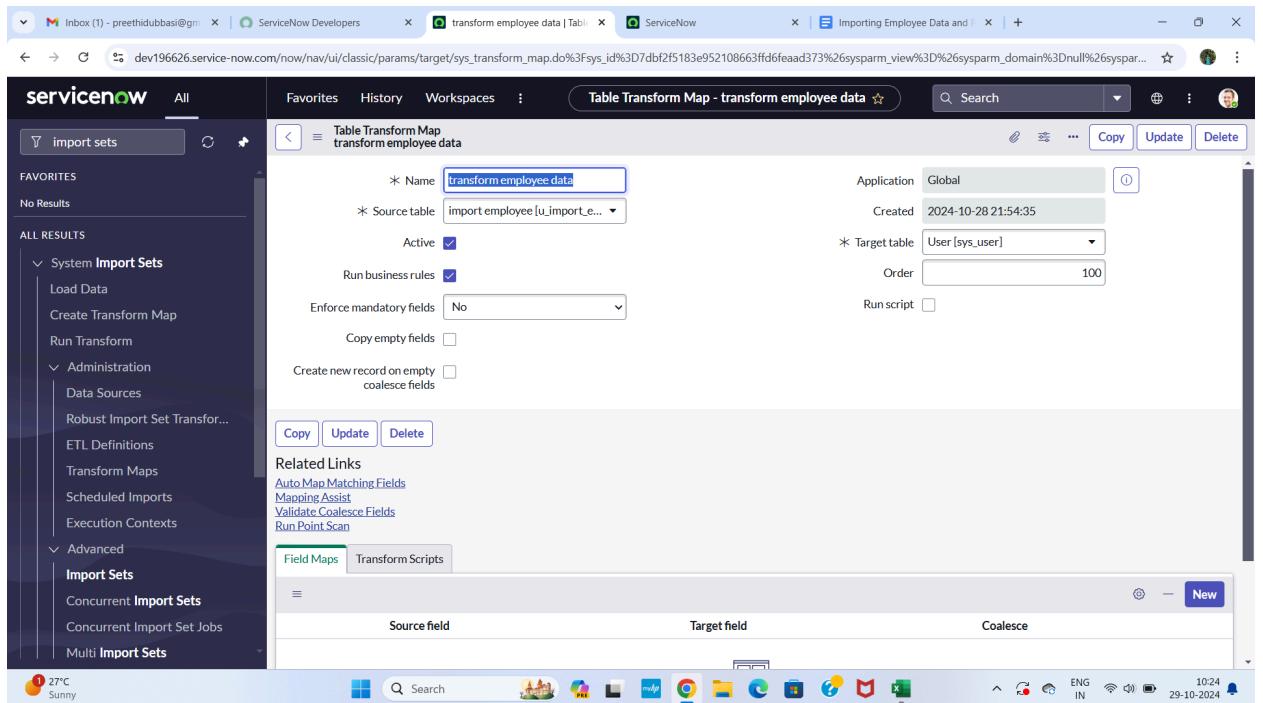
The screenshot shows the ServiceNow interface with the search bar set to "import employee data". The results table displays two rows of imported data:

NAME	EMAIL	DEPARTMENT	MANAGER	State	Error
priyanka	456@gmail.com	salesforce	rakesh	Inserted	(empty)
preethi	123@gmail.com	servicenow	rakesh	Inserted	(empty)

Related Links include: Import Sets, Transform Maps, Transform History, and Edit Web Service.

## Activity 3: Create transform map

1. Open service now.
2. Click on All >> search for import set
3. Select create transform map under import sets
4. Click on new
5. Fill the following details to create a new transform map
6. Give name as: Employee data transform
7. Select source table: import employee data
8. Select target table: user[sys\_user]
9. Save the form.



The screenshot shows the ServiceNow Transform Map interface. The main title is "Table Transform Map - transform employee data". The configuration details are as follows:

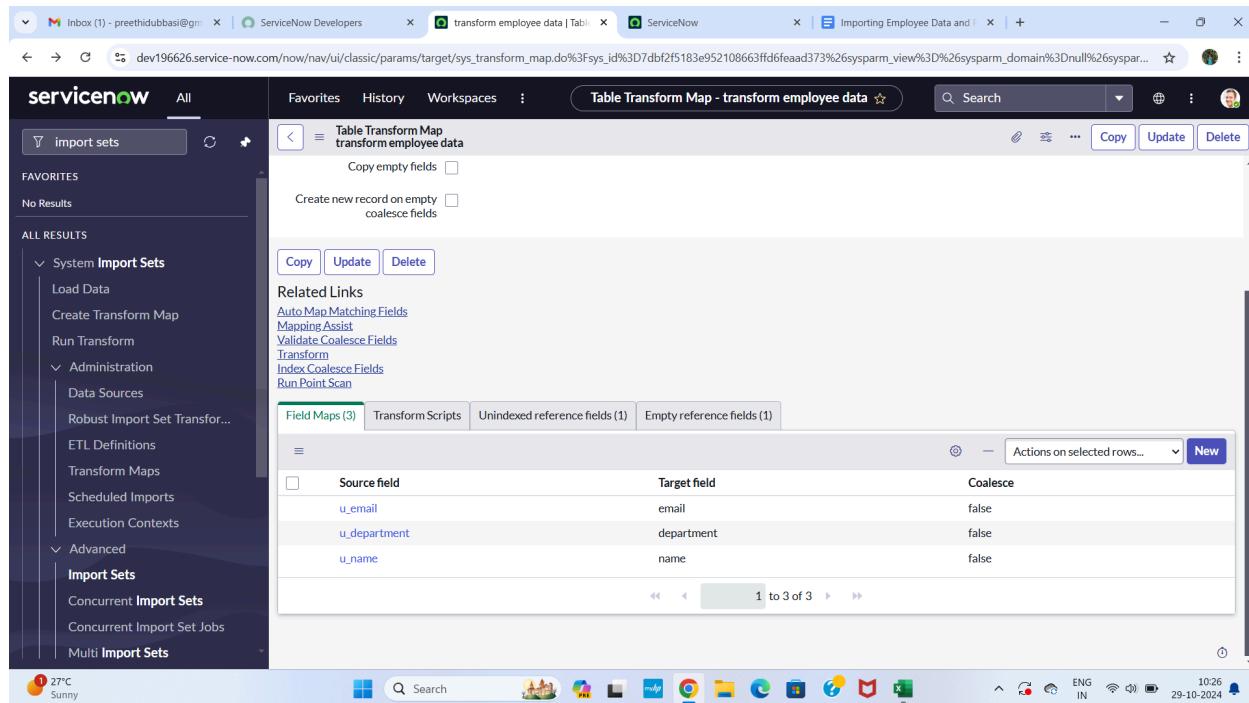
- Name:** transform employee data
- Source table:** import employee [u\_import\_e...]
- Active:** checked
- Run business rules:** checked
- Enforce mandatory fields:** No
- Copy empty fields:** unchecked
- Create new record on empty coalesce fields:** unchecked
- Target table:** User [sys\_user]
- Order:** 100
- Run script:** unchecked

Below the main form, there are "Related Links" including Auto Map Matching Fields, Mapping Assist, Validate Coalesce Fields, and Run Point Scan.

The "Field Maps" tab is selected, showing a table with columns: Source field, Target field, and Coalesce. There are currently no mappings listed.

## Activity 4: Match the fields using mapping assist

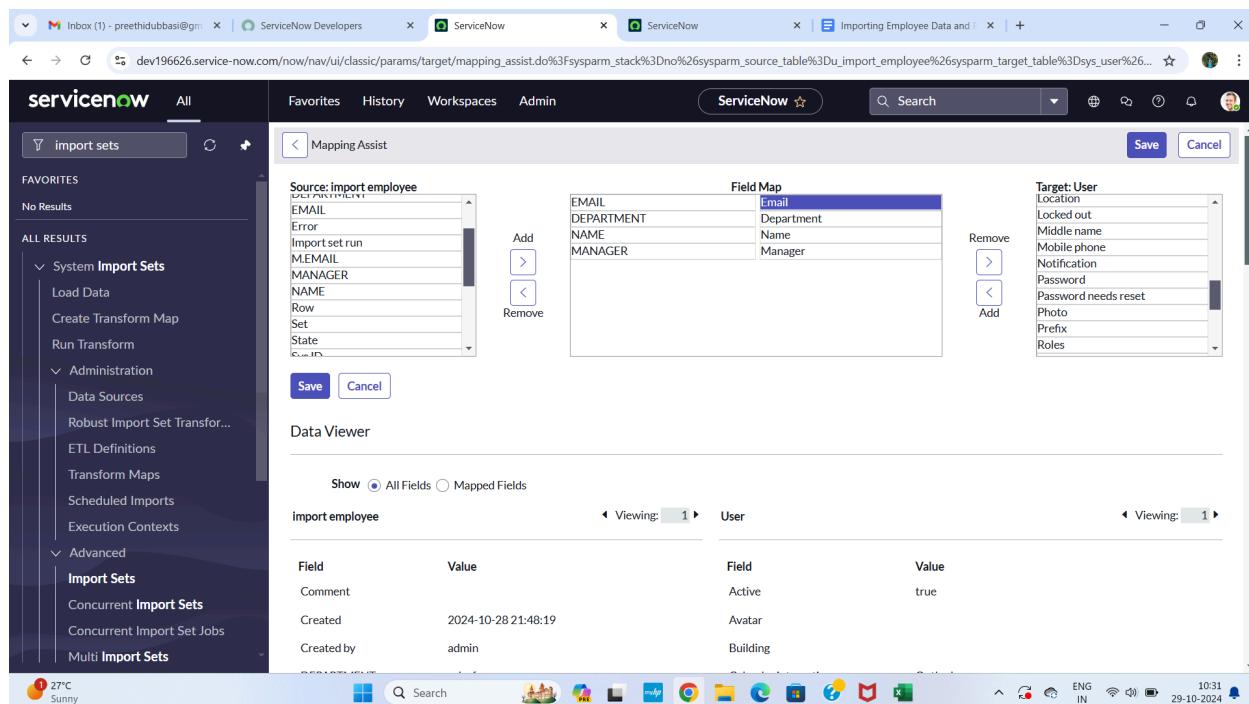
1. Scrolled down the created transform map form
2. Click on auto matching fields
3. Then in the mapping fields some fields are matched



The screenshot shows the ServiceNow Transform Map interface. The left sidebar navigation includes 'Import Sets' under 'System'. The main area displays a 'Table Transform Map - transform employee data' configuration. It shows three field maps:

Source field	Target field	Coalesce
u_email	email	false
u_department	department	false
u_name	name	false

4. Using mapping assist map the manager field.
5. Select the fields which you are mapping in the staging table and target table
6. Select manager in source table and add
7. Select manager field in target table
8. Click on the save button.



The screenshot shows the ServiceNow Mapping Assist interface. The left sidebar navigation includes 'Import Sets' under 'System'. The main area displays a 'Mapping Assist' configuration for 'import employee' to 'User'.

**Source: import employee**

- EMAIL
- Error
- Import set run
- M.EMAIL
- MANAGER
- NAME
- Row
- Set
- State
- User ID

**Field Map**

Source Field	Target Field
EMAIL	Email
DEPARTMENT	Department
NAME	Name
MANAGER	Manager

**Target: User**

- Location
- Locked out
- Middle name
- Mobile phone
- Notification
- Password
- Password needs reset
- Photo
- Prefix
- Roles

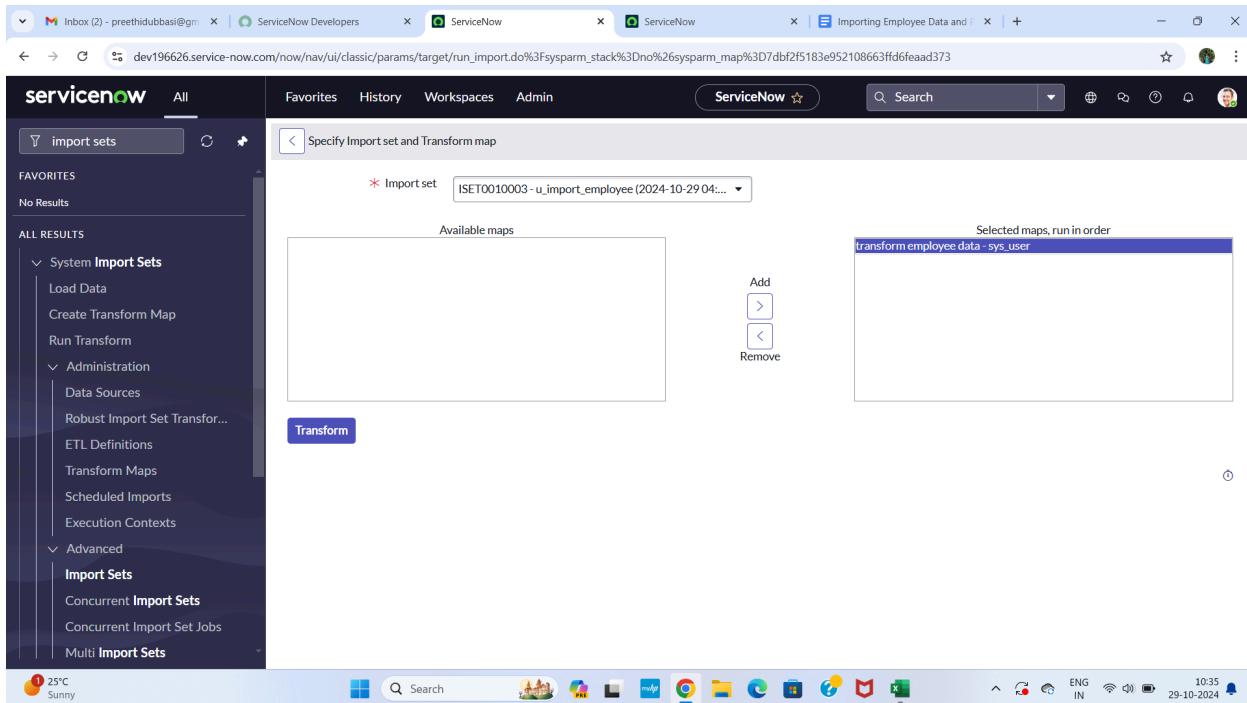
**Data Viewer**

Show  All Fields  Mapped Fields

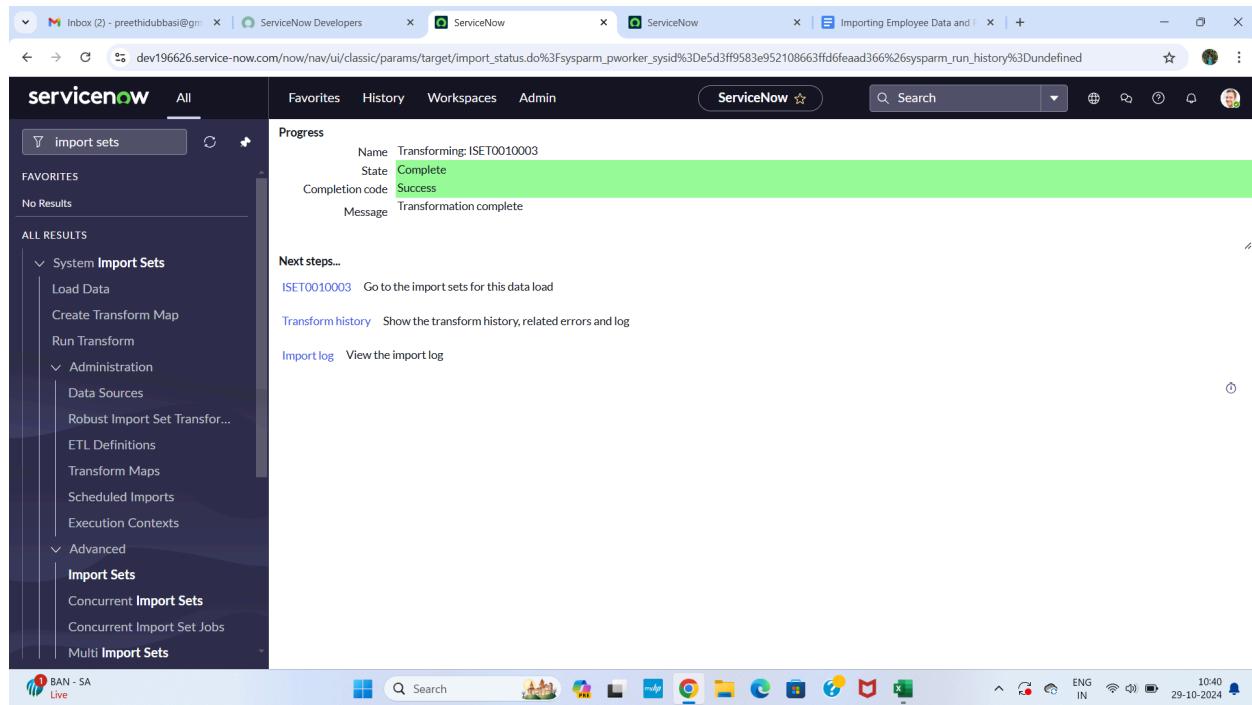
import employee	User
Comment	Active
Created	Avatar
Created by	Building

## Activity 5: Transform the Data

1. Click on transform in the related links.
2. Click on transform.
3. Data's transform state is completed.



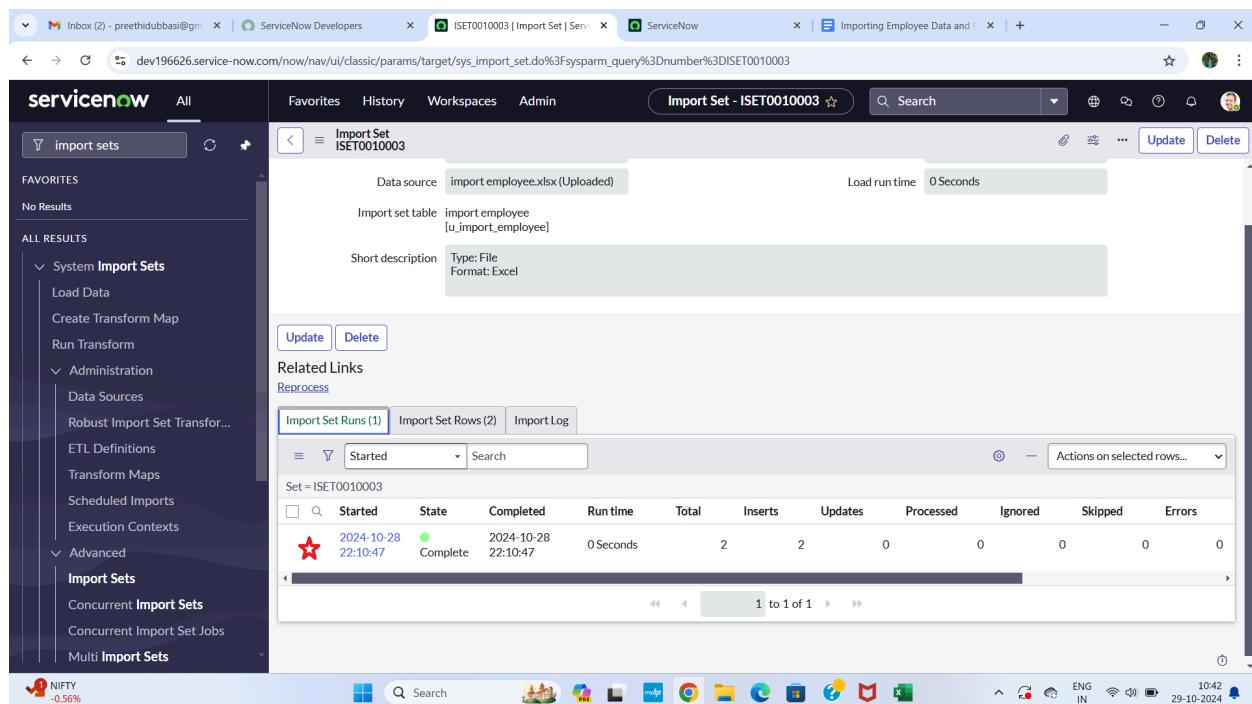
The screenshot shows the ServiceNow web interface for managing import sets. The left sidebar navigation is open, showing categories like System Import Sets, Administration, and Import Sets. The main content area is titled "Specify Import set and Transform map". It displays an "Import set" dropdown menu showing "ISET0010003 - u\_import\_employee (2024-10-29 04:...)" and two panels: "Available maps" (empty) and "Selected maps, run in order" (containing "transform employee data - sys\_user"). A "Transform" button is visible at the bottom of the panel. The top navigation bar includes tabs for Favorites, History, Workspaces, Admin, and ServiceNow, along with a search bar and various system icons.



The screenshot shows the ServiceNow Import Sets progress page. A green bar at the top indicates a successful transformation named "Transforming: ISET0010003" with state "Complete" and completion code "Success". Below this, under "Next steps...", there are three options: "ISET0010003 Go to the import sets for this data load", "Transform history Show the transform history, related errors and log", and "Import log View the import log". The left sidebar shows the navigation menu for Import Sets.

4. Click on ISET0010003 under next steps

5. Two rows are inserted.

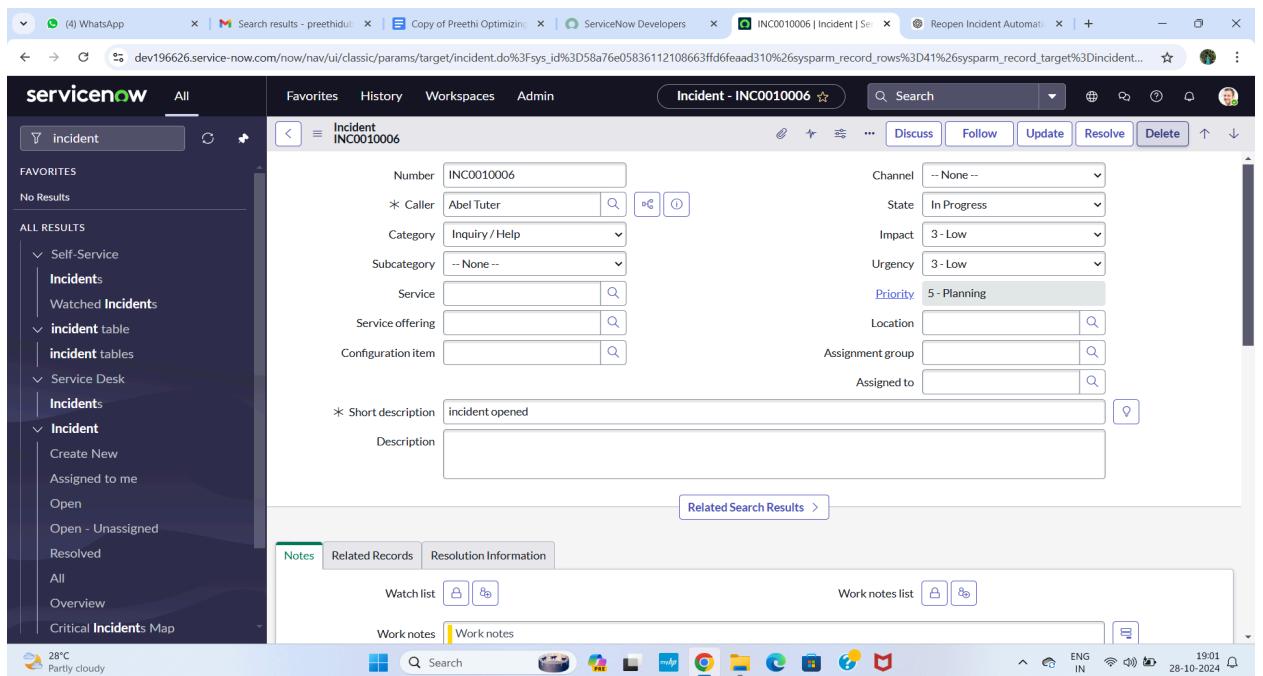


The screenshot shows the ServiceNow Import Set details page for "Import Set - ISET0010003". It displays the data source as "import employee.xlsx (Uploaded)" and the import set table as "import employee [u\_import\_employee]". The short description indicates the file type is Excel. Below this, there are "Update" and "Delete" buttons. A table titled "Import Set Runs (1)" shows one completed run from 2024-10-28 at 22:10:47, which is marked as "Complete". The run statistics show 2 inserts and 2 updates. The left sidebar shows the navigation menu for Import Sets.

## Milestone 2: Dot walking

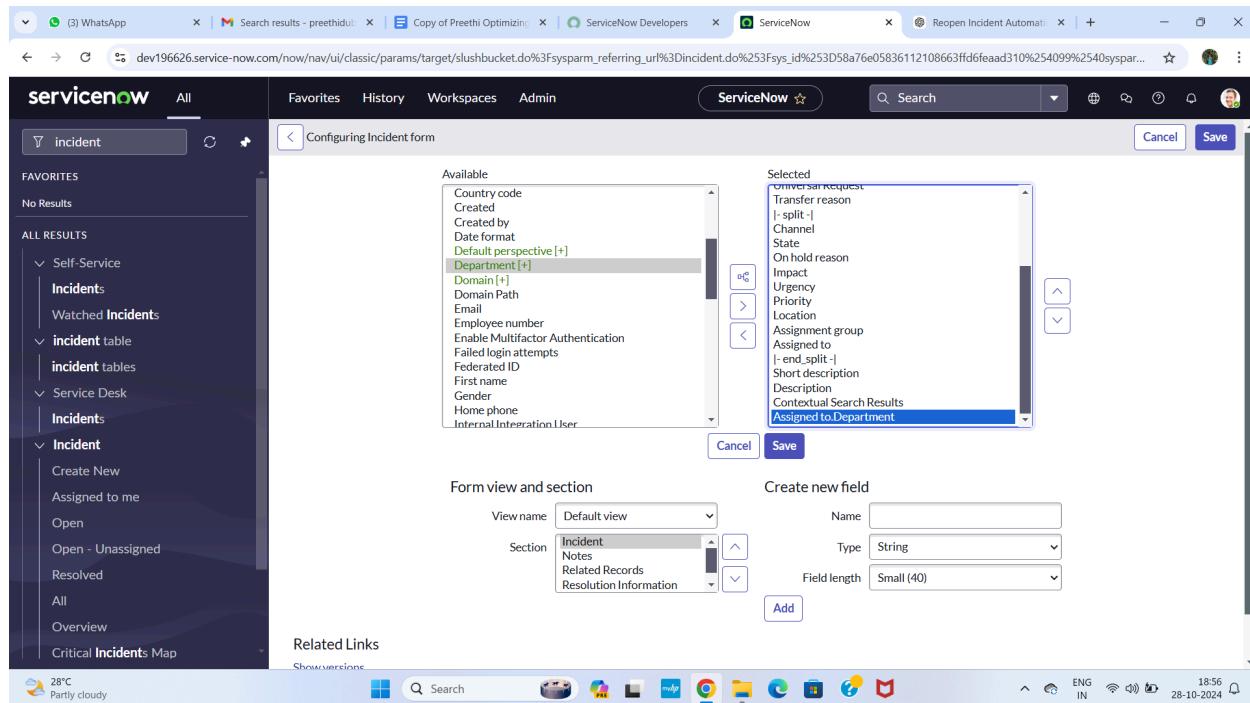
### Activity 1: Display department to the assigned to user

1. Open service now.
2. Click on All >> incident
3. Select create new under incidents
4. There is no field like department in the form
5. Email and manager fields are not visible



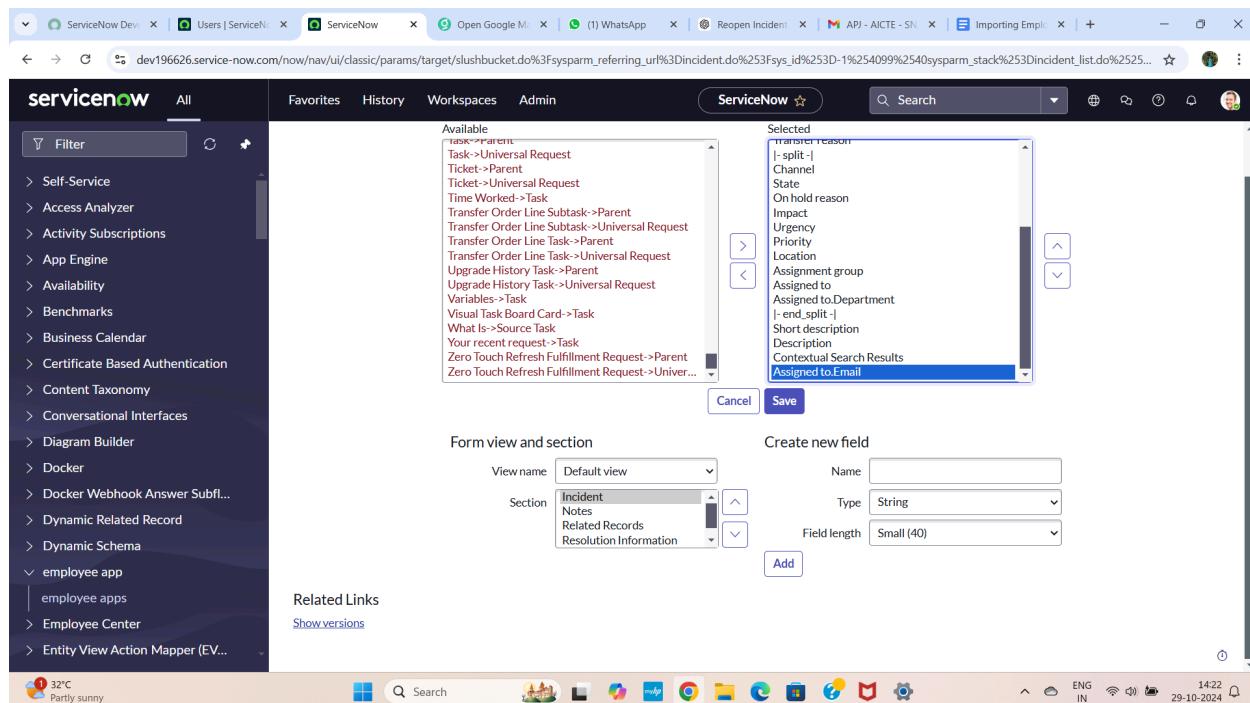
The screenshot shows the ServiceNow interface for creating a new incident. The left sidebar navigation bar is visible, showing categories like Self-Service, Incidents, and Service Desk. The main area is titled 'Incident - INC0010006'. It contains various input fields for incident details such as Number (INC0010006), Caller (Abel Tuter), Category (Inquiry / Help), Subcategory (None), Service offering, Configuration item, Channel (None), State (In Progress), Impact (3 - Low), Urgency (3 - Low), Priority (5 - Planning), Location, Assignment group, and Assigned to. Below these fields are short description ('incident opened') and description text boxes. At the bottom, there are tabs for Notes, Related Records, and Resolution Information, along with Watch list and Work notes sections. A context menu is open at the top right, showing options like 'Configure', 'Form Layout', 'Edit', 'Delete', and 'Save'.

6. By using dot walking retrieve the data without opening the record
7. Click on context menu go to configure and select form layout
8. Select assigned to.department as mentioned below
9. Click on save.

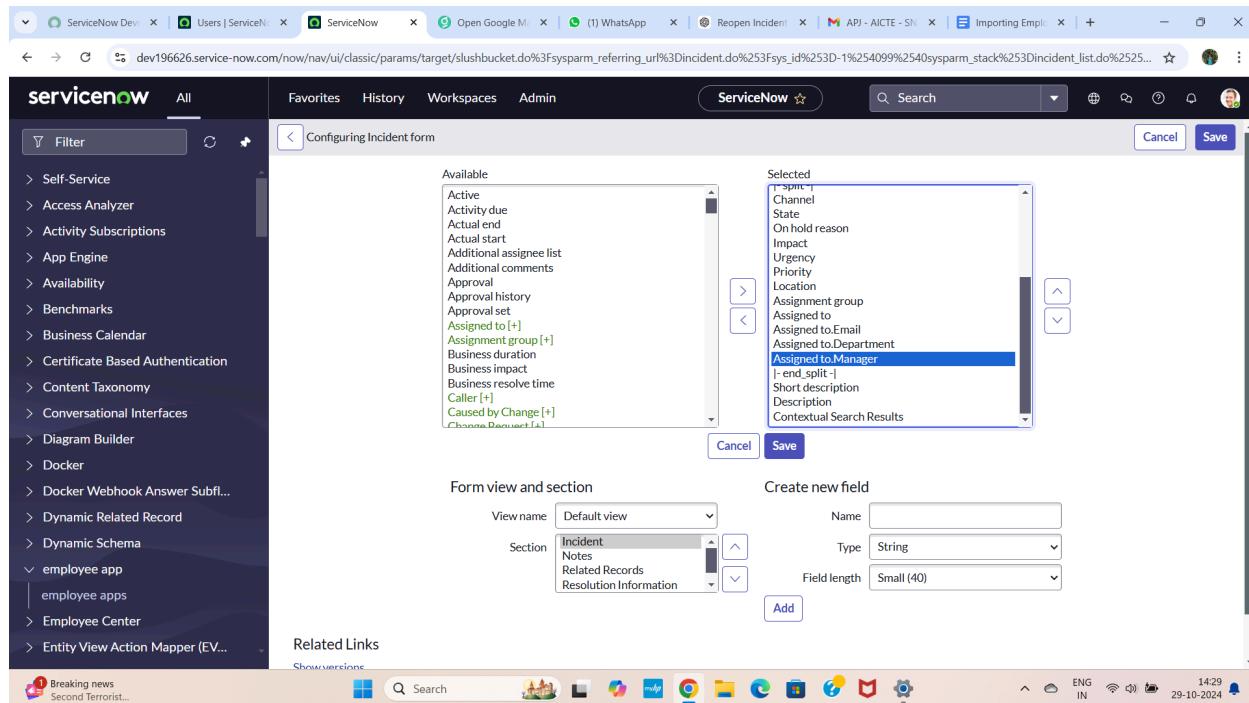


The screenshot shows the ServiceNow interface for configuring an incident form. The left sidebar navigation includes 'Self-Service' > 'Incidents' > 'Incident'. The main window title is 'Configuring Incident form'. The 'Available' section lists fields like 'Country code', 'Created', 'Created by', 'Date format', 'Default perspective [+]', 'Department [+]', 'Domain [+]', 'Email', 'Employee number', 'Enable Multifactor Authentication', 'Failed login attempts', 'Federated ID', 'First name', 'Gender', 'Home phone', and 'Internal Integration User'. The 'Selected' section contains fields such as 'Universal Request', 'Transfer reason', '[-split-]', 'Channel', 'State', 'On hold reason', 'Impact', 'Urgency', 'Priority', 'Location', 'Assignment group', 'Assigned to', '[-end\_split-]', 'Short description', 'Description', 'Contextual Search Results', and 'Assigned to.Department'. Below this is a 'Form view and section' panel with 'View name: Default view' and 'Section: Incident Notes Related Records Resolution Information'. To the right is a 'Create new field' panel with 'Name: ', 'Type: String', and 'Field length: Small (40)'. Buttons for 'Cancel' and 'Save' are at the bottom.

10. Add another field assignment.email.
11. Also add assignment.manager field
12. Click on save.

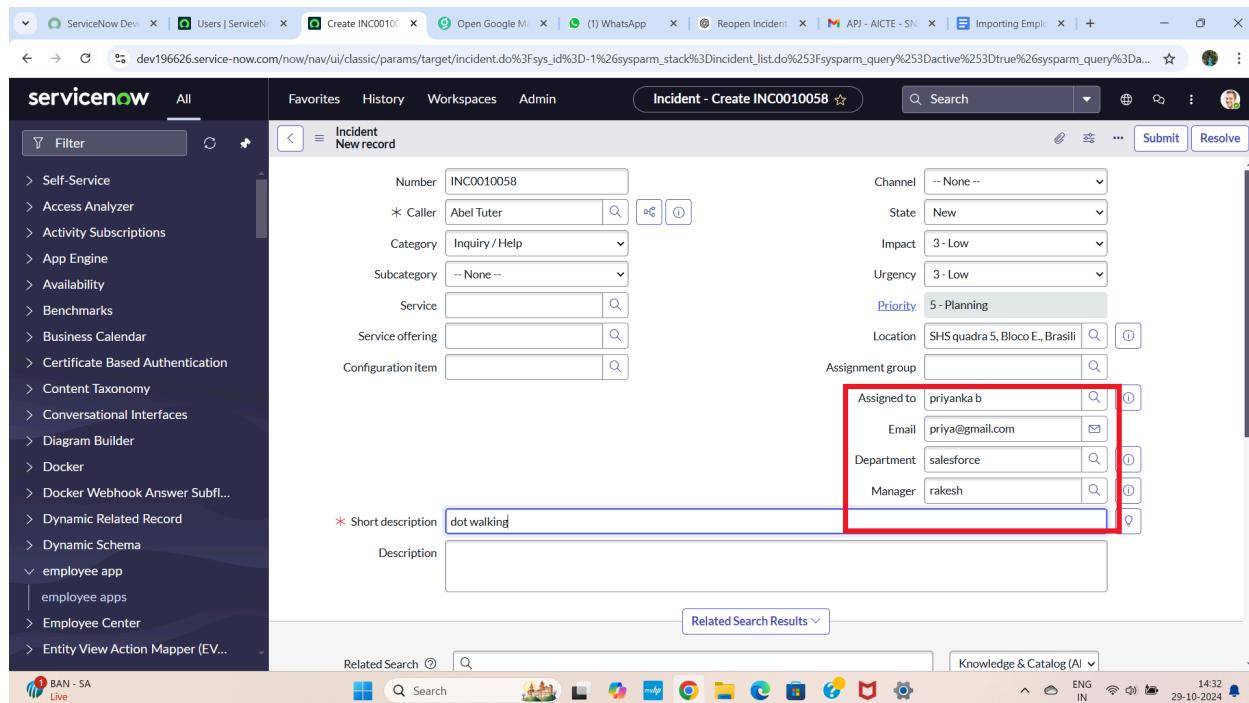


This screenshot shows the same ServiceNow configuration interface for the incident form. The left sidebar navigation is identical. The main window title is 'Configuring Incident form'. The 'Available' section now includes additional items like 'Task->Universal Request', 'Ticket->Parent', 'Ticket->Universal Request', 'Time Worked->Task', 'Transfer Order Line Subtask->Parent', 'Transfer Order Line Subtask->Universal Request', 'Transfer Order Line Task->Parent', 'Transfer Order Line Task->Universal Request', 'Upgrade History Task->Parent', 'Upgrade History Task->Universal Request', 'Variables->Task', 'Visual Task Board Card->Task', 'What Is->Source Task', 'Your recent request->Task', 'Zero Touch Refresh Fulfillment Request->Parent', and 'Zero Touch Refresh Fulfillment Request->Universal Request'. The 'Selected' section remains the same. The 'Form view and section' and 'Create new field' panels are also present, with the 'Section' dropdown now showing 'Incident Notes Related Records Resolution Information'.



The screenshot shows the ServiceNow configuration interface for an incident form. In the center, a modal window titled 'Configuring Incident form' is open. The 'Selected' list contains various incident-related fields such as 'Assigned to Manager', 'Channel', 'State', 'On hold reason', 'Impact', 'Urgency', 'Priority', 'Location', 'Assignment group', 'Assigned to', 'Assigned to Email', 'Assigned to Department', and others. Below this, there's a 'Create new field' section where a new field named 'Default view' is being defined with a string type and a small (40) field length. The left sidebar lists various ServiceNow modules like Self-Service, Access Analyzer, and Activity Subscriptions. The status bar at the bottom indicates the system is in English ('ENG') and Indian ('IN') mode, with the date '29-10-2024'.

13. Open an incident form
14. Fill the mandatory fields and assigned to just imported user
15. Then department and email field is automatically filled

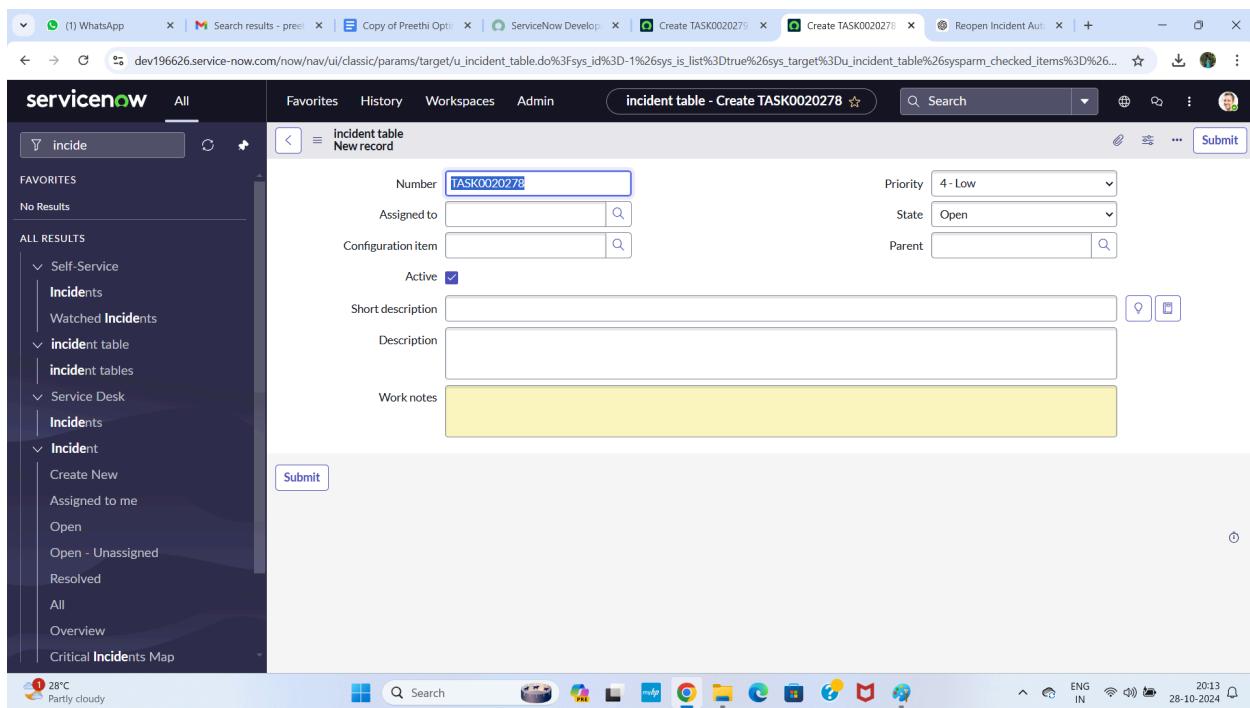


The screenshot shows the ServiceNow incident creation screen. A new record is being created with the number 'INC0010058'. The 'Assigned to' field is highlighted with a red box and contains the value 'priyanka b' and the email 'priya@gmail.com'. Other fields include 'Caller' (Abel Tuter), 'Category' (Inquiry / Help), 'Subcategory' (None), 'Service' (dropdown), 'Service offering' (dropdown), 'Configuration item' (dropdown), 'Channel' (dropdown), 'State' (New), 'Impact' (3 - Low), 'Urgency' (3 - Low), 'Priority' (5 - Planning), 'Location' (SHS quadra 5, Bloco E, Brasili), and 'Assignment group' (dropdown). The status bar at the bottom indicates the system is in English ('ENG') and Indian ('IN') mode, with the date '29-10-2024'.

## Milestone 3 : Dictionary override

### Activity 1: Make the state to 3-moderate in incident

1. Take existing extended table or
2. Create one table as: incident table which is extended from task
3. So task table fields are automatically assign to extended table
4. Open the duplicate tab
5. Click on All> incident table
6. Open the incident table and priority have 4

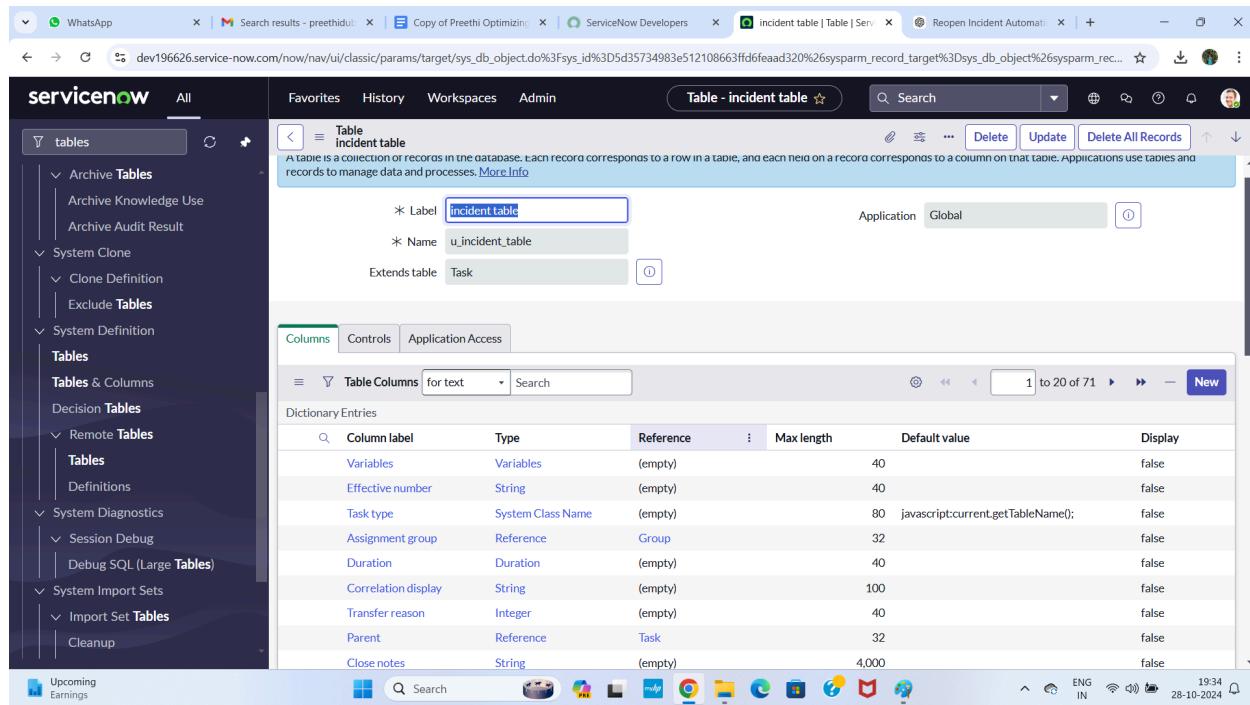


The screenshot shows the ServiceNow interface for creating a new incident record. The left sidebar navigation bar has 'incident' selected under 'Self-Service > Incidents'. The main workspace is titled 'incident table - Create TASK0020278'. The form fields are as follows:

- Number:** TASK0020278
- Assigned to:** (empty field)
- Configuration item:** (empty field)
- Priority:** 4 - Low
- State:** Open
- Parent:** (empty field)
- Active:** checked
- Short description:** (empty field)
- Description:** (empty field)
- Work notes:** (yellow highlighted field)

At the bottom right of the form is a blue 'Submit' button.

7. Open incident table tab
8. In columns select priority default value is 4 and task table have same default value.

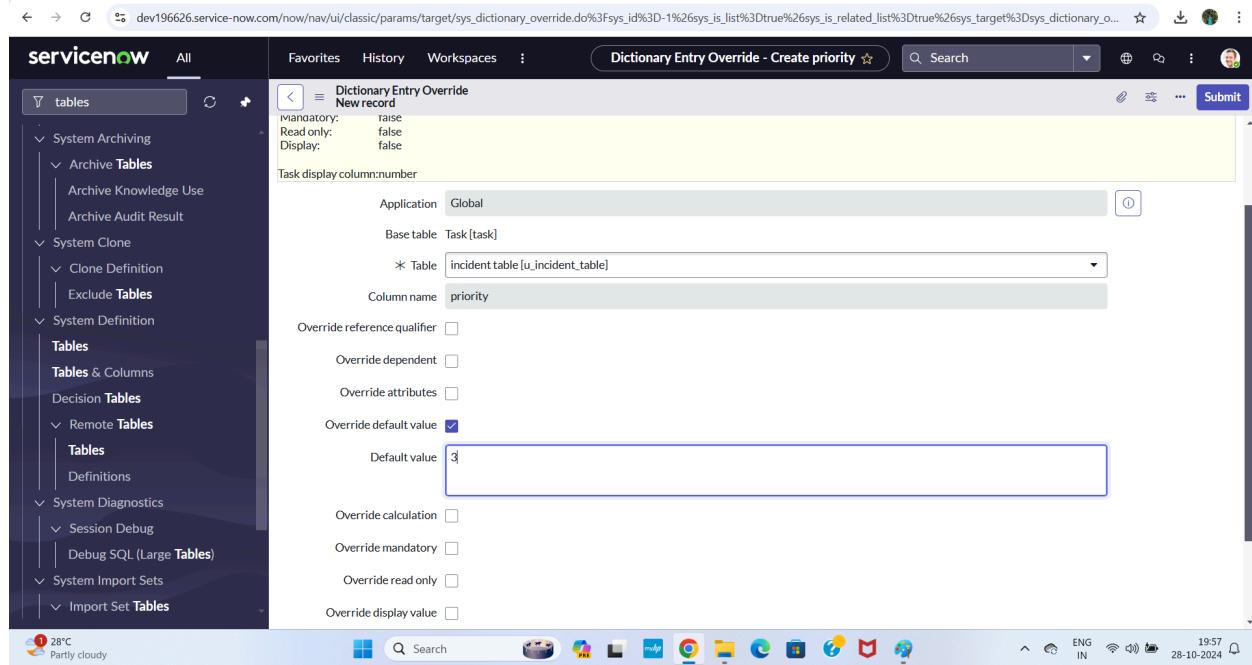


The screenshot shows the ServiceNow interface for configuring the 'incident table'. The left sidebar is expanded to show the 'Tables' section under 'Tables & Columns'. The main area displays the 'Table - incident table' configuration. Key details shown include:

- Label:** incident table
- Name:** u\_incident\_table
- Extends table:** Task
- Dictionary Entries:** A table showing column definitions:
 

Column label	Type	Reference	Max length	Default value	Display
Variables	Variables	(empty)	40	false	
Effective number	String	(empty)	40	false	
Task type	System Class Name	(empty)	80	javascript:current.getTableName();	false
Assignment group	Reference	Group	32	false	
Duration	Duration	(empty)	40	false	
Correlation display	String	(empty)	100	false	
Transfer reason	Integer	(empty)	40	false	
Parent	Reference	Task	32	false	
Close notes	String	(empty)	4,000	false	

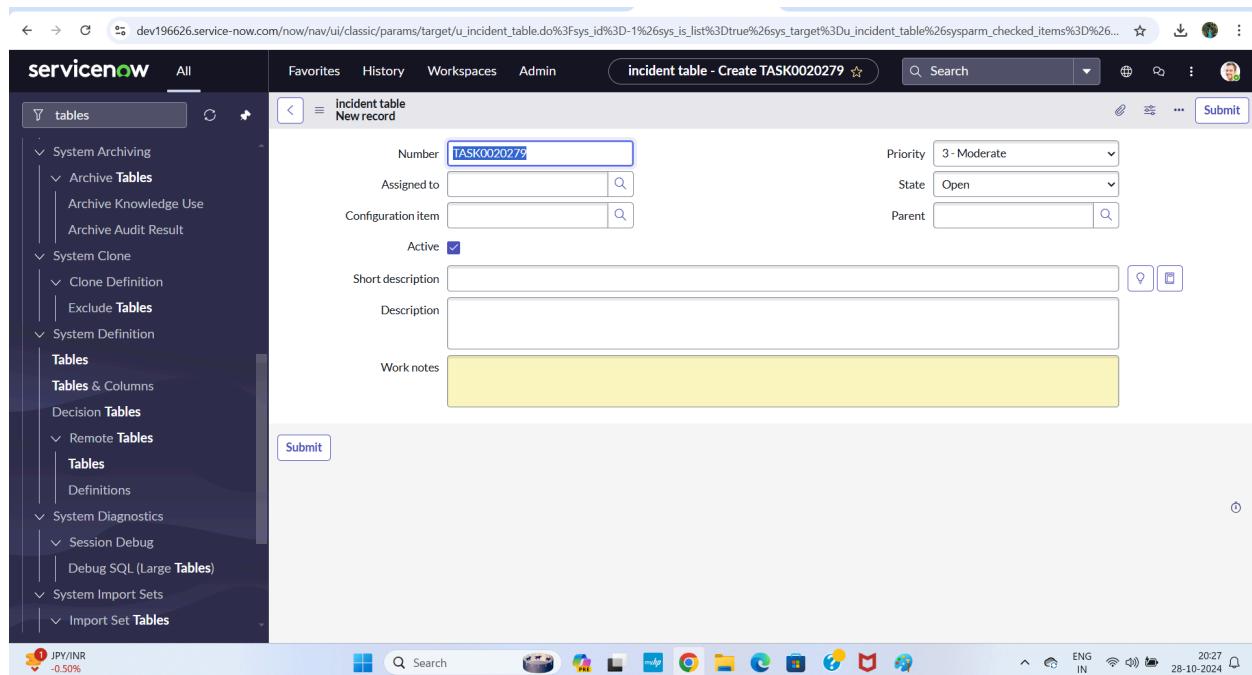
9. Use dictionary override method
10. Change the default value of priority field in one incident table
11. Scrolled down select dictionary override
12. Click on new
13. Select table as: incident table[u\_incident\_table]
14. Column name is priority
15. Click on override default value
16. Enter default value 3
17. Click on submit



The screenshot shows the 'Dictionary Entry Override - Create priority' page in ServiceNow. The 'Base table' is set to 'Task [task]' and the 'Column name' is 'priority'. The 'Default value' is set to '3'. Other options like 'Override calculation' and 'Override mandatory' are unchecked.

18. Open incident table and check the priority field

19. Priority is changes to 3-moderate



The screenshot shows the 'incident table - Create TASK0020279' page. The 'Priority' field is set to '3 - Moderate'. Other fields like 'Number', 'Assigned to', 'State', 'Configuration item', 'Active', 'Short description', 'Description', and 'Work notes' are also visible.

**Conclusion :**

In this scenario, we streamlined incident management in ServiceNow by automating the import of employee data, displaying department manager information directly on incidents, and setting a custom priority default specifically for incidents. This setup saves time, ensures data accuracy, and gives incident handlers quick access to relevant information, making incident resolution faster and more efficient.