

WEEK 1 - 8

Introduction to Importing Data in ServiceNow

Importing data into ServiceNow is an essential task for many administrators and developers. It allows you to populate your instance with initial data, update existing records, and maintain data consistency. This document will guide you through the various methods of importing data into ServiceNow, highlighting best practices and potential challenges.

Import Sets: The Foundation for Bulk Data

Import

Import sets are the cornerstone of data importation in ServiceNow. They offer a robust and structured method for bringing in data from external sources, such as spreadsheets, databases, or other applications. This process involves creating a "mapping" between the fields in your external data and the corresponding fields in your ServiceNow tables.

Import sets allow you to define the source of your data, specify the format (CSV, Excel, etc.), and configure the transformation rules to ensure accurate data migration. You can also control the import process, pausing or restarting it as needed. ServiceNow provides a user-friendly interface for managing import sets, enabling you to track progress, identify any errors, and resolve issues efficiently.

Understanding Transform Maps

Transform maps are the key to successful data importation. They act as the bridge between the structure of your external data and the fields within your ServiceNow tables. By defining transform maps, you tell ServiceNow how to interpret and map the data from your external source to the corresponding fields in your ServiceNow records.

Transform maps are particularly crucial when dealing with complex data structures or when you need to apply specific transformations, such as formatting dates, converting currencies, or cleaning up data before it enters ServiceNow. You can create multiple transform maps for different data sets and use them repeatedly for consistent data importation.

Data Import with CSV Files

CSV (Comma Separated Values) files are a common format for exchanging data between different applications. ServiceNow offers native support for importing data from CSV files. You can easily create a CSV file with your data, ensuring that each row represents a record and each column corresponds to a field in your ServiceNow table.

When importing from a CSV file, you'll need to specify the delimiter (e.g., comma, semicolon) used to separate the data values in the file. You can also define data types for each column, ensuring that the data is correctly interpreted by ServiceNow. Importing CSV files is often the most straightforward method, particularly for simple data structures.

Importing Data from Excel Spreadsheets

Excel spreadsheets are another common format for storing and managing data. ServiceNow allows you to directly import data from Excel files. You can create a new Excel spreadsheet or import data from an existing one. Similar to CSV imports, you'll need to map the columns in your spreadsheet to the fields in your ServiceNow table.

ServiceNow can automatically detect and handle different spreadsheet formats, including XLS and XLSX. You can also specify a range of cells to import, allowing you to import only specific data from your spreadsheet. Importing from Excel offers a user-friendly and familiar approach for many users.

Importing Data from Databases

For more complex scenarios, you might need to import data directly from a database.

ServiceNow allows you to connect to various database types, such as Oracle, SQL Server, MySQL, and PostgreSQL. You can use SQL queries to retrieve the data you need and import it into your ServiceNow instance.

Importing from databases offers a powerful and flexible approach, allowing you to extract specific data based on your criteria. It's ideal for scenarios where you have a large volume of data or need to perform complex data transformations. However, setting up the database connection and defining the SQL queries requires a deeper understanding of SQL and database administration.

Best Practices for Importing Data

Plan Your Imports

Before you start importing data, it's essential to plan your approach. Define your goals, identify the source of your data, and create a clear mapping between the external data and your ServiceNow fields. This planning will ensure a smoother import process.

Test Thoroughly

Always perform thorough testing before importing large amounts of data. Use a small sample of your data to verify the mapping, transformations, and the overall import process. This will help identify and resolve any issues before they affect your production data.

Handle Errors Gracefully

During the import process, errors may occur due to data inconsistencies or issues with the mapping. ServiceNow provides mechanisms for handling errors, allowing you to log errors, retry failed imports, or skip problematic records. Understanding these mechanisms is crucial for a successful import process.

Document Your Process

It's essential to document your import process, including the source of the data, the mapping rules, and any specific transformations applied. This documentation will be invaluable for future reference, maintenance, and troubleshooting.

Additional Considerations

When importing data, keep in mind that ServiceNow is a platform designed for managing IT services and operations. Therefore, it's essential to ensure that the data you import is relevant to your IT processes and aligns with your business goals. Consider using ServiceNow's built-in data management tools and features, such as Data Management, to optimize your data import strategy.

Additionally, consider using APIs or integrations to automate the data import process. This can significantly reduce manual effort and improve data consistency. ServiceNow offers various integration options, including REST APIs, SOAP APIs, and middleware integrations, allowing you to connect to a wide range of external applications and systems.