

# WEEK 1 - 6

## Forms in ServiceNow: A Comprehensive Guide

ServiceNow forms are the foundation of many workflows, providing a user-friendly interface for data input and management. This guide delves into the intricacies of forms in ServiceNow, covering everything from basic layouts to advanced features like personalization and templates.

### The Standard Layout

ServiceNow forms adhere to a standard layout that ensures consistency across the platform. This layout typically includes a form header, a main form area, and a sidebar. The form header displays the record's title, while the main form area houses the form fields. The sidebar, located on the right side, provides quick access to related lists, actions, and other relevant information.

### Form Field Types

ServiceNow offers a wide range of form field types, each designed for specific data input needs. Some common types include:

- Text
- Number
- Date
- Time
- Reference
- Choice
- URL
- Image
- Attachment

These field types ensure that data is captured accurately and efficiently, enabling seamless workflow management.

### Saving Changes

Saving changes to a ServiceNow form is straightforward. Users can click the "Submit" button, which typically appears at the bottom of the form, to save their input. Alternatively, the "Save" button allows users to save changes without closing the form.

The "Save" button is especially useful for forms with multiple sections or extensive input, as it allows users to save their progress at different stages. This helps prevent data loss and ensures a smooth workflow.

## Insert / Insert & Stay

ServiceNow offers two methods for creating new records: "Insert" and "Insert & Stay." The "Insert" option saves the new record and redirects the user to the newly created record's details page. "Insert & Stay," on the other hand, saves the new record and keeps the user on the same form for creating another record. This is particularly useful when creating multiple records of the same type.

Option	Action	Result
Insert	Saves the record and redirects to the details page.	New record created, user taken to the details page.
Insert & Stay	Saves the record and keeps the user on the same form.	New record created, user remains on the form for creating another record.

## Form Sections

Form sections are a powerful tool for organizing complex forms. They allow you to group related fields together, making forms more visually appealing and easier to navigate. You can create as many sections as you need, and each section can have its own label and description.

For example, you might create separate sections for "Contact Information," "Technical Details," and "Attachments" on a form for reporting incidents.

## Related Lists & Formatters

Related lists provide a quick way to view and manage related records associated with a form.

For example, on a task form, you might have a related list for "Related Incidents." Formatters allow you to customize the display of related list data, enhancing its readability and usability.

For instance, you can use a formatter to display the priority level of related incidents in a different color, making it easier to identify urgent issues. This improved visualization helps users understand the context of the current form and its relationship to other records.

## Form Views

Form views allow you to create different layouts and configurations for the same form, catering to specific user needs or roles. For example, you might create a "Full View" for administrators with access to all form fields and a "Simplified View" for end-users with limited permissions.

Form views offer flexibility in managing form access and ensuring a tailored experience for different users. They can be customized with specific fields, sections, and layouts, making the form interface more relevant and efficient for each user role.

### User Experience

Form views enhance user experience by providing tailored layouts based on user roles and access levels.

### Access Control

They enable granular control over which fields and sections are visible to different users, ensuring data security and minimizing confusion.

**Efficiency**

Form views streamline data entry by presenting only the relevant information to each user, making the process more efficient.