Week- 1 Understanding Document

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What is ServiceNow?

ServiceNow is an application platform as a service which provides services to enterprises over the cloud and allows employees to work how they want to and not how the software dictates them tp work.
It delivers products and services which provides a digital workflow to an organisation and helps in,

1. Service Management
2. Human Resource Management
3. Financial Service Management

Types of Releases in ServiceNow?

1. Feature Release
2. Patch Release
3. Hot Fix

State the differences between List View and Form View?

List View	Form View
<incident.list>	<incident.do>
Multiple Records per page.	One record per page.
Limited Fields	More Fields
Limited Control	More Control

Wildcard Search Tips?

*(term) --> Gives all the entries which contains term
!*(term) --> Gives all the entries which dosenot contain term
=(term) --> Equality
!=(term) --> Not Equal
(term)% --> Starts with term

%(term) --> Ends with term

Client Side Customization and Server Side Customization

UI Policy
1. Runs on <u>client</u> side.
2. Works in Form
3. No Coding Required
4. Used to make a field as mandatory, visible, hidden or read-only.

UI Action
1. Runs on <u>client side and server side</u>.
2. Allows us to add additional functionality to our forms by allowing us to add buttons, menu items to our form.

Business Rule
1. Runs on <u>server side</u>.
2. It runs when a record is inserted, read, updated or deleted.
3. Business rules are listed in *sys_script* table.
4. Types of business rules,
    1. Based on when to run,
        a) Before   c) Display
        b) After   d) Async
    2. Operations when to perform,
        a) Insert   c) Update
        b) Query   d) Delete

Client Script
1. Runs on the <u>client side</u>.
2. Generally works on the form view but can also be implemented to list view.
3. Types of Client Scipts,
    1. onLoad()   3. onCellEdit()
    2. onSubmit()   4. onChanges()

Data Policy
1. Runs in the backend or the server side.
2. Used to make fields mandatory or read only.

3. Also known as UI Policy of server side.

Update Set
Set of confoguration changes that can be moved from one instance to another.
Items we can capture,
1. UI Action
2. UI Policy
3. Business Rules
4. Client Scripts

Items we cannot capture,
1. Records
2. Users
3. Groups
4. CMDB Records
5. System Properties

Tables
1. It is a place where the records are stored.
2. It has rows and columns.
3. Row is known as record and column is known as field.
4. Field can have different data types.

Data Dictionary Table:

A central place containing detailed information about tables in ServiceNow.

Key Tables:

•*sys_db_object*: Stores all ServiceNow tables.
•*sys_dictionary:* Stores information about fields in each table.
•*sys_documentation*: Stores field labels and descriptions for tables.

Table Relationship

1. **One to Many-** One field of a table is referencing other table.
2. **Many to Many-** Two or more table are related to one another.
3. **Extended-** One or more table can be extented from another table.

Types of Table in ServiceNow

1. **Base Table-** The table which is not exteded from any other table.
2. **Extended Table-** The table which is extended from another table.
3. **Core Table-** Table created by ServiceNow.
4. **Custom Table-** Table created by ServiceNow admin or ServiceNow developer.

User Administration in ServiceNow

1. **User -**
   1. People having account in ServiceNow.
   2. They are a part of *sys_user* table.
   3. Can be part of specific groups.
   4. Can be assigned various roles.

2. **Groups -**
   1. Collection of user with has same role.
   2. Part of *sys_user_group* table.
   3. Roles are assigned to various groups.
   4. Groups can be a part of parent group.

3. **Roles-**
   1. Collection of permission to give certain amount to access to the users in ServiceNow.
   2. Part of *sys_user_role* table.
   3. Roles are assigned to a group.
   4. Role can be a collection of other roles as well.

Access Control List (ACL)

1. They determine upto how much an user can interact with a data in a table in ServiceNow.
2. ACLs are a record in the *sys_security_acl* table.
3. To create or manage ACL we need to elevate our role.

ACL Flows in ServiceNow

1. ACL are assigned to roles.
2. Roles are assigned to groups.

3. Groups are assigned with users.
4. ACLs can be directly assigned to users.

Import Sets

Import Sets in ServiceNow are a powerful feature used to import data from external sources into ServiceNow tables. They allow you to bring data from a variety of formats (like CSV files, Excel sheets, XML, etc.) into ServiceNow, process it, and then map it to the appropriate tables in the system.

Data Source:

> The data you import comes from a Data Source, which defines where the data originates. This could be a file (e.g., CSV, Excel), an LDAP server, a JDBC database, or even another ServiceNow instance.

Import Set Table:

> When you import data, it is first stored in a temporary table called an Import Set Table. This table is created dynamically and holds the raw data before it is transformed or moved to the target tables.

Transform Map:

> A Transform Map defines the rules for transforming and mapping data from the Import Set Table to the target table in ServiceNow.

Transfrom
> Once mapping is done we can transform our data to the target table with this function.

Colace Map

In ServiceNow, a Coalesce Map is used in Transform Maps during data import to prevent the creation of duplicate records in the target table. By coalescing on one or more fields, ServiceNow identifies whether a record with matching values already exists in the target table. If a match is found, the existing record is updated with the new data; if no match is found, a new record is inserted.

What is SLA?

SLA stands for service level agreement. They are a certain amount of services which are meant to be provided by the enterprises in a mentioned time. It defines a work flow.

What is Service Catalog?

The Service Catalog in ServiceNow is a centralized portal that allows users to browse and request various IT and business services. It provides a user-friendly interface where employees can easily find and order items like software, hardware, access requests, or support services, much like shopping online.

Each item in the catalog is associated with a workflow that manages the approval, fulfillment, and delivery of the requested service. This streamlines service delivery, enhances user experience, and ensures that requests are handled efficiently and transparently within the organization.

What is a Variable?

They are a variety of questions that can be asked to end user while purchasing an catalog item.

Collection of variables that can be shared between catalog item is called variable set.

What is Order Guide?

An Order Guide in ServiceNow is a feature within the Service Catalog that simplifies the process of ordering multiple related items in one go. It acts like a wizard, guiding users through a series of questions or steps to help them select and configure various items that are part of a larger service or project.

For example, when onboarding a new employee, an order guide might help request a laptop, software licenses, and building access all within a single, streamlined process. This ensures that all necessary components are ordered together, reducing the chance of missing any essential items and making the request process more efficient for both the user and the fulfillment team.

What is Record Producer?

A Record Producer in ServiceNow is a type of catalog item within the Service Catalog that allows users to create records in a specific table through a simplified form interface.

Unlike a typical catalog item that might request a service or product, a Record Producer is designed to create new records in any ServiceNow table (like incidents, change requests, or HR cases) based on user input.

What is Catalog Builder?

Catalog Builder in ServiceNow is a tool designed to streamline the process of creating and managing catalog items within the Service Catalog. It provides a guided, user-friendly interface that allows catalog administrators or content creators to quickly build, modify, and publish new catalog items without needing extensive technical knowledge.

With Catalog Builder, users can define the properties of catalog items, such as forms, fields, workflows, and approvals, in a structured and intuitive way. This tool simplifies the catalog creation process by offering templates and reusable components, ensuring consistency and reducing the time and effort required to deploy new services to the catalog. It also allows for collaboration between different teams, making it easier to manage and maintain a large and diverse set of service offerings within the organization.

What is Flow Designer?

1. Flow designer is an interface with which we can enable process automation capability.

2. It can be used in approval, task, notification and record operations.

3. It has a non technical interface.

4. It provides a drag-and-drop interface for designing complex flows involving actions, conditions, and integrations, allowing users to automate tasks and streamline business processes without writing code.

What is Flow Operator?

A role or user responsible for monitoring and managing the execution of flows designed in the Flow Designer. Flow Operators ensure that workflows run smoothly, handle any issues or errors, and make adjustments as needed to optimize performance and efficiency.

What is Action Designer?

A component within the Flow Designer used to create and configure reusable actions that can be included in various flows. Action Designer allows users to define the specific steps or operations that should be performed within a flow, such as sending notifications, updating records, or making API calls.

Components of a Flow Designer?

1. Trigger
2. Condition
3. Action
4. Data

Types of Triggers?

1. **Record Based –** It triggers when a record is created or updated.

2. **Date Based -** It triggers a flow at a specific date and time.

3. **Application Based-** It triggers a flow when an application specific condition is met.

What are conditions in Flow Designer?

They are configurations which specifies when the flow designer will be active.

What are Actions?

Actions are operation that the system would perform like create task, update task, update field and ask for approval.

What are CMDB?

CMDB stands for Configuration Management Database. It is a series of table which gives information about the different configuration items and their attributes and the relationship between them.

The three tables of CMDB are:

- *cmdb*
- *cmdb_ci*
- *cmdb_rel_ci*

What are Configuration Items (CI)?

Any item that needs to be managed to provide services. A CI can be a laptop, router or other devices. A CI record will contain all relevant data such as,

- Name
- Owned By
- Vendor
- Model ID
- Used For

What is CI Relationship (*cmdb_rel_ci*)?

1. It stores the different kinds of relationship between different CI.
2. It helps to understand the root problem of a particular issue.
3. It also helps to understand which services will be affected because of an issue with a particular CI.
4. It helps to understand the infrastructure of a particular IT company.

What is Service Portal?

Powerful tool that helps the developes to create user interfaces that are responsive, mobile friendly and pixel-perfect which have full access to the now platform.

What is Knowledge Portal?

It allows user to create, edit and view knowledege articles to share information across organisations.
Each article contains information which help the end users to troubleshoot a particular issue.
Knowledge articles are a part of different categories and knowledge bases.

Knowledge, Knowledge_manager, Knowledge_admin.

Knowledge Management Features:

- Knowledge Base
- Knowledge Categories
- Draft Knowledge Articles
- Publish Articles
- Article Feedback
- Retire Article

Knowledge Base -> Knowledge Category -> Knowledge Article

Different ways to interact with ServiceNow?

- Workspace
- List
- Form
- Dashboard
- Knowledge Base
- Service Catalog

What is workspace?

Workspace is an interface which provides agents and professional targetted and purpose built tools and information on a single page.

Helps to solve issue faster as everything happens on a single place.

What are Reports?

Reports helps to vizualize the state of data in different format like bar-chart, pie-chart etc.

What is Baseline Implementation?

It is a set of installed application on ServiceNow instance before any configuration or customization has be done.

What is Instance?

Instance is a copy of ServiceNow environment that is specific to a customer. There can be three types of instances,
1. Production Instance- Where people do work and support their customer.
2. Non Production Instance- Used for development, testing and experimentation.
3. Development Instance- Developers can get their own persoanl instance to do experimentation and learning outside the company's environment.

What are Notifications in ServiceNow?

Notification is a service which helps to notify the users about occurance of various events inside ServiceNow.

What are the different types of Notifications in ServiceNow?

- Email
- SMS
- Meeting Invitation

What are the steps to setup Email Notifications?

- Create Email Layout
- Add Layout to Email Template
- Apply Template to Notification

Difference between configuration and customization?

Configuration	Customization
Refers to the process of adjusting and setting up the system's built-in features and functionalities to meet specific business needs without modifying the underlying code. This includes setting up forms, fields, workflows, and user roles using the available options in the platform.	Customization involves modifying or extending the platform's functionality beyond its standard features, often through scripting or development. This includes creating new tables, writing custom scripts, or building unique integrations that require changes to the underlying codebase.