LISTS AND USER ADMINISTRATION

IN SERVICE NOW

OVERVIEW

- Lists
- Forms
- User Management

LISTS

- Everything in Service Now is stored as a record in a data table

- The list of records in any given table is called the 'list view'

  o Often just referred to as a list

- A personalized list shows a custom list for a particular user with only the columns that they choose

- Individual records can be accessed from the record list

- Multiple fields can be edited at once from the list view

- Users can apply filters to the list to see a subset of data or locate a specific record

- Lists can be sorted in ascending or descending order by selecting the column the user wants to sort by

- Filters require 3 parts: field, operator, value

LISTS DEMO

- Let's navigate a list
- Applying filters
- Identify wildcards
- List, column, and field context menu
- Create a personalized list
- Creating views

LISTS ACTIVITY

- Practice each item we have just gone over. In your instance, complete the following tasks in any list you choose:
  - Create a personalized list view
  - Create a new view that is available for all users
  - Create a new filter and save it
  - Export 5 records as an XML file, delete those records, and restore those records by importing the XML file again
  - Search the list to return only records where a field (of your choice) must begin with the letter 'M'

FORMS

- Forms display fields from a single record

- Users can only view and edit fields in records they have access to

- Forms contain fields, sections, and related lists

- Related lists display records from tables that have a relationship with the current record
  - For example, a school record may have a related list of students

- Fields in a form can be one of the following data types:
  - Reference – a query that displays records from another table
  - Date/Time - day and time of day
  - String – 254 characters or less
  - Choice – a dropdown list of choices
  - True/False - boolean

FORMS DEMO

- Let's fill out a form

- Tour the form designer

USER MANAGEMENT

- The user table stores user records, including details like their name, address, email, and even their login password

  o Sys_user

- Users work on tasks in the SNOW platform

- A task is any record that can be assigned or completed by a user

- Task assignment is done through:

  o Individual user – this is a specific user; users can belong to more than one group

  o User Groups – identifies a subset of users based on roles and are given a unique name; groups can be nested

  o Roles – control access and permissions to features and capabilities within applications and modules

- The User Presence feature facilitates synchronous collaboration on a single record

  o This allows multiple users to make edits to the same record at the same time

USER MANAGEMENT DEMO

- Let's access 'My Work' and 'My Groups Work' under the Service Desk

- Create a new user

- Assign the new user a role

CHALLENGE

- Create an admin user for yourself (if you haven't already done so)
  - Logout and Login as your new admin profile (use these login credentials every day from now on!)
- Create 18 users
  - 3 - ITIL users ('itil' role should be given directly)
  - 2 - ITIL users (role should be given via group)
  - 2 - Incident manager (role should be given via group)
  - 2 - Problem manager (role should be given via group)
  - 2 - Change manager (role should be given via group)
  - 2 - Knowledge manager (role should be given via group)
  - 5 - Normal end users (no roles given)
- Create 4 locations
  - North, South, East, West

- Create 6 departments
  - Reception
  - Veterinary Care
  - Nursing
  - Diagnostics & Laboratory
  - Surgery
  - Administration & Finance
- Create 5 groups (ITIL, IM, PM, CM, KM) having 2 users minimum in each group
  - ITIL group will have 'itil' role
  - IM group will have 'incident_manager' role
  - PM group will have 'problem_manager' role
  - CM group will have 'change_manager' role
  - KM group will have 'knowledge_manager' role
- Create 5 Cost Centers: Medical equipment & Supplies, Facility Operations, Staff Training, Marketing, Research

TERMINOLOGY

- List – refers to the record list view that displays records belonging to a table in a list format

- Personalized List – a customized list view for a single user

- Form – used to display fields for a single record

- Task – any record that can be assigned and completed by a user

- User Presence Feature – allows multiple users to take action on a single record synchronously