Service now week two understanding document

In this week i have learnt these topics

Demonstrate a comprehensive understanding of ServiceNow platform overview and architecture.
• Customize the user interface and branding elements within ServiceNow.
• Manage tasks efficiently using ServiceNow functionalities.
• Configure notifications and implement knowledge management practices.
• Create and manage service catalogs effectively.
• Configure tables and fields, as well as access control lists.
• Import data into ServiceNow and manage the CMDB.
• Integrate ServiceNow with other systems and applications.
• Utilize update sets, events, and platform statistics for effective administration.

Service now was known to be a ticketing tool
now it is a automation platform where you can automate businesses

Architecture
-> It is a single data model which is built on a flexible table schema and delivers a common set of core capabilities and reusable components.
->It has multi- instance architecture (not multi tenant)
Here all data applications and customizations reside in a unique software stack called an instance
each instance is isolated from other instance but can communicate with other
It provides high Availability data centers
Provides Backups

Backup is also used in cloning activity as Lower instances are copied from production instances security
You can further secure your applications and fields using role-based access.

Platform interface
SN provides 3 ways to interact with the platform
1) user interface → mainly used
2) mobile intertare → Agent, Now mobile, Orboarding
3) Service portal → Advanced, UI
All has access to single system of record and common data model of the service now platform

Supported Authentication
→ Local DataBase.
→ Multi- factor
→ Single Sign - on
→ LOAP
→ OAuth 2:0

RoLe Based Access

The next level of access is based on the roles given to users
Roles are given to the users based on there responsibilities

COMPONENTS

user = has access to your service now instance.
Group =Set of users.
Role = collection of permissions assign to a group.

BASE SYSTEM ROLES

Admine role = provide you the access whole platform
Approver_user = provides access to approve the task

itil = provides read and write access to itsm applications like incident change.
catalog_admin= catalog management.

USER Interface (given in week 1)

user login screen.
Banner Frame
Application Navigator
Content

Branding Interface

How to change logo ete.
In AppNav type
type welcome page content
then change

LIST and Filters

list: displays a record from a data table.

List elements

1) main list
2) Tittle bar
3) Filters.
4) Bread crumbs (conditions selected)
5) Column and Field

List context menu

It is used to change the format of the records.

It has

Sort ,show visual task Board, Group by caller.Bar chart, Pie chart, configure, Import, Export,update selected, update all, create Application Files, Import XML, show XMIL

FORMS

In this section we will learn about how forms shows data from the table component of form.Form personalization form customization, form templates

A form displays information from one record in a data table

Form has different elements

1) Content frame
2)Form title
3)Form menu
4) UI Actions

you can create new record by pressing on create new under Incident in Navigation Bar.

→ If we submit the form it will get saved and Form disappears but if we Save the form it will not make the form disappear

→ Two mandatory fields in Forms are. caller, short description.

→ Forms also have a read only, choice fields.

→ Form also has work notes and comments It you update the form then the changes will be shown in activities.

→ Form also has sections

→ Forms also has related list which shows the related data to the current table.

→ You change the view of the form via Form layout and For Design

right click on top → contig →Form layout (or) Form Design

In form design we will simply drag and drop objects and fields

configuration of list

Same way as we do for Form:
Service now gives you a functionality in which you can create a template and apple template while creating new record
→ Create new → to 3 dots on top → template
We can also schedule template.
Itil and admin are two Base line system roles

TASK MANAGEMENT

A task is any record that can be. assigned or completed by a user in Service now.
Users create tasks and are notified as the task moves along a workflow.
Task can be assigned to specific users or user group

Task work flow

The step by step process of resolving a problem.

Task table (It will be under System Definition in NB).

It has incident table, Request table, change table and many more.

Functionalities associated with tasks

1) Approvals. (requests)
2) Assignments
3) Service level agreement

TASK Assignment

It can he assigned to user (or) group, but user should have access to that particular record.
Dynamic content can be sent with the help of email script.

when ever a table is extended from a task table (or) any other table it will basically inherits all the fields of parent table and some specfic fields for that table.

Ways of Task Assignment

→ Manual (can be done directly in the form.)
→ Assignment Rule (System Policy in NB)
→ Predictive Intelligence:
→ Custom Rules.

Service Desk Applications

Application Nav → Service desk. → My work.

EFFECTIVE TASK MANAGEMENT

Need to use additional Functionalities on the task records
→ like work notes and comments which are basically used to update the progress of action to Complete the task.
→ Activity stream shows all activities performed for a task with respective timeline

NOTIFICATIONS

outbound and inbound
when records are created update or any event is generated.
service now can send notifications to the users configured.
Service now to user= outbound
user to service now = Inbound

Notification applications
In App Nav type system notifications
It has 3 types
1) mail 2)push 3)provider

NOTIFICATION FORM

service now admins can create new notifications we need to provide few fields while doing it
Those fields are
Name.
Table category
when to send
who will receive
what it will contain.
In the video they have shown how notification can be created and a demo.

INBOUND Email Action Form

Name
Target table.
Action type.
when to run(it has few types)
Actions
stop processing
Description.

Knowledge Management

Knowledge article
is a record in knowledge base that provides information to users.
It can be a policies,self-help tips, and resolution steps.

Benefits of knowledge Management
→ one stop shop to find answers.
→ provides centralized location for: creation, categorization viewing of articles
→ stores information in knowledge Base
→ articles in service now are represented as KB articles

Knowledge applications

Users can create and maintain articles in K.B.
→ type Knowledge in App Nay
In Home page we get different K.B's
→ Create an article is used in creating, new Articles.

Articles
→ create new
→ import Article.
→ unpublished.
→ published
→ Retired
→ All
Feedbacks are used to improve the content of the articles
we can rate the article in these methods
Flag the article.
Give Feedback
Provide comment

Feed Back Management

It has the following sections.
Feed back.
My Flagged.
All Flagged
Tasks

we also have administration section it has
Guided setup
K. B
RatingS.
Searklog (Keywords entered by users)
Messages,properties,user criteria.

Knowledge Portal.

It is advance usa of Knowledge Homepage It can be viewed in portal.

Knowledge Form

Fields in knowledge Form.
i number
K. B
Category
Valid to
short description
Article type.
Workflow
Source task
Attachment link.
Display attachment
Article Body

By clicking on View Article you can view the end - user view.

Knowledge Management workflow

Article is created
Sent for Approval.
Article is published
Article is requested to Retire.
Sent for Approval
Article is Retired.

Import Articles

wa can import Articles from word document you can do it in Import Articles section, under knowledge in App Nav.
Doc and Doc x tiles can be imported in Knowledge management

Service catalog

It is a request ordering system.

Benetits
→ one stop shop to request different services provided by organizations
→ helps us in requesting the right service.
→ multiple catalogs can be created
we can see cataloes under set service applications In App nav.

Service catalog categories

Service
Software
Hard wave.
Office
Desktop
Mobiles

To open catalog type service catalog in APPNAV

Service catalog roles

admin = Has access to all
Catalog admin = Manage catalog but can not have access to scripting
catalog manager
cataloy Editor= who can not edit catalog

Service catalog components
order - item we can order 3 different types
1) item
2)order Guide (multiple catalog items)
3) Record producer

Order Form It has 2 components
i) variables = Questions
2) variable sets = collection of variables.

ordering process
1) work tow
2) Flows

Request OUTPUT

when user place an order to request a service or product it creates records related to the request

Request stages
when a request is submitted by the user then user can track the request by knowing the stages of the requested item.

Example.
manager Approval
Department Approval
Configuration
Delivered

TABLES & FIELDS

Service now stores data in the form of database structure and it has components like tables records and fields.

Service now data structure has following fields
1) Tables 2) records 3) List

Service now data related tables
tables = Has all the tables present in service now
tables and columns = can see all the tables and their column details

Dictionary = which contains the definition of each table and field in the database.
Indexing is a way to optimize the performance of a database when a query is processed
Indexing helps you in better searching Indexing is not invented by servica now

Tables

A table is a collection of record in database, where information can be entered
Tables have individual rows and these rows correspond to a record in a table.
Tables also have columns which correspond to a field on record.
Every record of a table in service now is also identified by a 32 char unified id which is called cis_id and that's unique for every record of a table.

Fields

Is a column of table that stoves data.
ex: Field name, Field valve

Table Relationships

One to many (with reference fields)
Many to many
Extend tables

Types of tables

Base tables (Parent table) (example=task, cmdi_ci)
Extended tables (Extended from another table)
Core tables (created by service now)
Custom tables. (Created by developer or admin)
Incident, core, problem tables are core tables.

Access control List

Types of permissions
Login
Application & modules (visibility)
Tables and records

access control is a kind of security rule which is defined to restrict the permission of a user to interact with tables and records.

Operations restricted
create
Read
Update
Delete.
execute
Edit _ ci - relation
Save as template
Report on. (cannot create report)
Personalize choices.

Security modules.
system properties. → secunty
High Security setting.
Access control List

Access control List

These rules are created at table record and field level.
ACL FORM and Fields
Type of ACL
operation.
Admin override (Admin can override ACL)
Name
ACL Details.

ACL RULE TYPES

Table, None (can call fields if condition is met)).
Table. * (applied for every field),
Table.Field (rules applied to a specific field)
It condition is met then only the fields mentioned can be. Seen

HOW ACL WORKS

1)user login
2)System finds ACL
3)System find rule
4)match found
    If yes
        Evaluate ACL
            Pass the ACL
                If yes grant access
                If no access not granted
    If no
        Grant access

DATA IMPORT

need

You might get the requirement from different users to bulk upload the data into servicenow in different tables so that you don't need to do manually create those records

Ways of data import

Import XML =used in transfering data from one incident to other
Import
Import set=data from various sources to tables

Import sets components

1)**Data Source:** - from where data should be imported
2)**Import set table**:- It is like a staging table
3) **Transtam map!**
4)**Mapping assist** :- Helps to map fields of source data and target data
5) **Coalesces** is used to trigger a check before importing of data.
If record is there then it will get updated otherwise new record will be created

Target table:- Finally the data will be imported into table known as Target table

Data Policy

rules that need to be followed.

CONFIGURATION MANAGEMENT DATABASE

It is a series of tables and fields which stores information about configuration items managed by organizations
It also stores relation between different configuration items

what is configuration item?
Tangible or intangible devices or applications

AppNav → Config → CMDB

CI FORM

contains info of CI

Fields present
Name.
Asset tag

Manufacturer=Company that develops CI
Asset
Class.
Company
Serial number.
Model ID
Assigned to

Key CMDB TABLES

Base configuration item
It is main parent table
Configuration item
extended from Base configuration table
CI Relationship
Defines relationship between tables

USAGE of CMDB

we can create different records. we can form a relationship.

CI Dependency view

display graphical infrastructure view of a CI and all other CI related to the CL

CL class Manager
displays the entire CI class available in the instance in hierarchical structure like tree showing all CI class definition in one place

INTEGRATION

ServiceNow can share data with 3rd party applications or external systems with integration
* SSO
* LDAP
* Monitoring
* Notifications
* Events

What is integrated?
* CMDB
* Incident Management
* Problem Management
* Change Management
* User Management
* Login via SSO

Ways of integration?
WEB SERVICES
LADP
EXCEL
EMAIL

INTEGRATION HUB

IntegrationHub provides a single solution to quickly integrate with third party application to share the data with ServiceNow or other system.

UPDATE SET

An update set is a group of configuration changes that can be moved from one instance to another. This feature allows administrators to group a series of changes into a named set and then move them as a unit to other systems for testing or deployment.

UPDATE SETS APPLICATION

System Update Sets
Update Sources
Retrieved Update Sets
Update log
Local Update Sets
Merge Update Sets
Merge Completed Sets
Update Sets to Commit

WHEN TO USE UPDATE SETS?
Changes you want to keep in every instance
All the changes which can change the baseline and can give impact
Changes needs to be tested in Lower instance before moving to Production

UPDATE SETS PLANNING PROCESS

1)Same version Instance
2)Correct Update Set is Selected
3)Instance is cloned
4)Identify Path for update Set movement
5)Plan when to commit Update Sets in Prod
6)Clear Naming Convention
7)Preview and Commit
8)Review before moving

WHAT IS AN EVENT?

Events are special log records the system generates when something notable has happened or certain conditions occur.

How to generate Event?

* Business Rules
* Event Queue Scripting API
* Flow
* Workflow

Event Actions

* Sending Notifications
* Action configured in Business Rule
* Action configured in flow
* Run a script action

Platform Stats

Stats module provides statistics for system activities that affect performance such as the execution of queries, scripts, and transactions.

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