

ServiceNow Platform and Development Fundamentals

What is ServiceNow?

ServiceNow is a cloud-based platform designed to streamline IT services for large enterprises, enabling business users to solve problems independently.

Highlights

- **Founding and Evolution:** ServiceNow was founded in 2003 by Fred Luddy, transitioning from GlideSoft to its current name in 2006.
- **Global Presence:** The company has over 17,000 employees and operates worldwide, with data centers across multiple regions.
- **Recognition:** ServiceNow has been acknowledged as one of the best places to work and is frequently listed among the most innovative companies.
- **Cloud-Based Platform:** The NOW Platform offers a wide range of IT applications and workflows, allowing users to create custom solutions.
- **Mission:** ServiceNow aims to enhance IT services, making them more intuitive and accessible for business professionals.

ServiceNow Platform Overview

Introduction

- Series focus: Learning for ServiceNow system administrator certification.
- Episode: Lesson two of ServiceNow Fundamentals.
- Topics: Platform overview, architecture, applications, workflows, user interfaces, and role-based access.
- Ending: Introduction to obtaining a personal ServiceNow instance.

Fred Luddy and ServiceNow Origins

- Founder: Fred Luddy, founded ServiceNow in 2004.
- Motivation: Dissatisfaction with IT staff making business people seem uninformed. Aim to enable business people to solve problems with intuitive technology.
- Interesting Fact: Fred Luddy, a college dropout, now has a net worth of \$1.3 billion.

NOW Platform Overview

- **Application Platform as a Service (aPaaS):** Combines aspects of Infrastructure as a Service (IaaS), Platform as a Service (PaaS), and Software as a Service (SaaS).
 - **Infrastructure:** Provides cloud-based infrastructure and compute resources.
 - **Platform:** Manages operating systems, patches, and software for development.
 - **Applications:** Offers a suite of out-of-the-box applications while allowing custom development.

Platform Architecture

- **Single Common Database:** Entire platform uses a single database and data model, supporting various functions across the organization.
- **Multi-Instance Architecture:** Each customer has a separate instance for better control and less intermingling of data.
- **Availability and Redundancy:** Redundancy built into every layer—devices, power, and network resources.
- **Backups and Security:**
 - **Backups:** Four weekly full backups and six days of differential backups.
 - **Security:** Certified by third-party security organizations.
- **Domain Separation:** Allows separation of applications and administrative tasks into different domains for better security control.

User Interfaces

- **Now Platform UI:** Primary interface, best used on desktop or laptop.
- **Mobile Apps:**

- **ServiceNow Agent App:** For fulfilling requests.
- **Now Mobile App:** Employee-specific functionality.
- **ServiceNow Onboarding App:** For new hires.
- **Service Portal:** Customizable web-based interface for specific user groups using widgets.

Role-Based Access and Authentication

- **Entities:**
 - **User:** Person with access to the instance.
 - **Group:** Set of users with common functions and access needs.
 - **Role:** Collection of permissions; can be assigned to users or groups.
- **Authentication:**
 - **Local Database Authentication:** Default method.
 - **Other Methods:** Supports LDAP, OAuth 2.0, digest tokens, and multi-factor authentication.

ServiceNow User Interface Overview

This chapter walkthrough provides a comprehensive overview of the ServiceNow platform user interface. Here's a breakdown of the key points covered in the video:

Overview of Main Screen Elements

1. Banner Frame:

- **Logo:** Click to return to the home page.
- **User Menu:** Access profile settings, impersonate users, elevate roles, or log out.
- **Tools:**
 - **Global Search:** Search across the entire instance.
 - **Connect Chat:** Internal chat tool for real-time communication.
 - **Help Tool:** Provides contextual help and access to documentation.
- **System Settings Gear:** Customize the UI, including general settings, theme, accessibility, list and form settings, notification settings, and developer tools.

2. Application Navigator:

- **Navigation Filter:** Search for applications and modules quickly.
- **Tabs:**
 - **All Applications:** Shows all available applications and modules.
 - **Favorites:** Access frequently used applications or records.
 - **History:** View the last 30 items visited.
- **Hierarchy:**
 - **Applications:** Top-level categories.
 - **Modules:** Specific functions within applications.
 - **Separators:** Grouping mechanism for modules.

Detailed Demonstration

1. User Menu:

- **Profile:** Modify personal settings like email and time zone.
- **Impersonate User:** View the system as another user to diagnose issues.
- **Elevate Roles:** Lock high-impact functions to prevent accidental errors.
- **Log Out:** Exit the ServiceNow instance.

2. Tools:

- **Global Search:** Search results categorized by record type.
- **Connect Chat:** Start and manage internal chats.

- **Help Tool:** Contextual help and documentation access.

3. System Settings:

- **General Settings:** Configure UI compactness, shortcuts, home page, date/time format, and time zone.
- **Theme Settings:** Customize color schemes for different instances.
- **Accessibility Settings:** Adjust for accessibility needs.
- **List and Form Settings:** Customize how lists and forms are displayed and managed.
- **Notification Settings:** Manage notifications and their channels.
- **Developer Settings:** Set preferences for development tools.

4. Application Navigator:

- **Filter Function:** Quickly find applications and modules by keyword.
- **Favorites:** Add frequently used items for quick access.
- **History:** Return to recently accessed items.
- **Hierarchy and Navigation:** Manage and navigate through applications and modules.

Practical Tips

- Use the **System Settings** to tailor the UI to personal preferences and improve efficiency.
- Utilize the **Application Navigator**'s filter to manage long lists of applications and modules.
- Leverage **Favorites** and **History** tabs for faster navigation to commonly used items.

The chapter concludes with a demonstration in a personal ServiceNow instance, highlighting practical use of each UI component and feature discussed. This hands-on approach helps solidify understanding of how to effectively navigate and customize the ServiceNow interface.

ServiceNow Branding Overview

Introduction to Branding in ServiceNow

- **Overview:** This episode focuses on customizing the out-of-the-box ServiceNow user interface to align with your company's branding.
- **Objective:** Learn how to apply corporate branding elements such as logos, colors, and fonts to personalize the ServiceNow interface.

Lesson Recap

- **Branding Purpose:** Make the ServiceNow interface reflect your company's identity to enhance user comfort and speed up adoption.
- **Components:** Includes customization of logos, colors, fonts, and other visual elements.
- **Certification Relevance:** Limited terminology required for certification exams, but useful for practical application.

Guided Setup Overview

- **Guided Setup Wizards:** Step-by-step tools provided by ServiceNow to assist with various setup tasks.
- **Types:**
 - **ITSM Guided Setup:** Includes company branding, connectivity, foundational data, and other ITSM components.
 - **ITOM Guided Setup:** Focuses on IT Operations Management tasks such as configuring MID servers and cloud provisioning.

Branding Steps in Guided Setup

1. **Accessing Guided Setup:**
 - Use the Application Navigator to search for “Guided Setup.”
 - Navigate to the **ITSM Guided Setup** module.
2. **System Configuration:**
 - **Tasks:**
 - Configure default settings like time zones and date formats.
 - Upload your company logo.
 - Customize the banner frame, browser tab text, background colors, and text separator colors.
 - **Demo:** Change page header caption and browser tab title. Update other visual elements and save changes.
3. **Welcome Page Customization:**
 - **Purpose:** Modify the login page with custom messages or alerts.
 - **Process:**

- Add new items or messages to the welcome page.
- Set display order and enter the message content.
- **Demo:** Create a new welcome message and adjust its display order.

Final Notes

- **Branding Goals:** Personalize the ServiceNow interface to reflect your company's branding, enhancing user experience and adoption.
- **Additional Tools:**
 - **Service Portal:** Customizable widget-based interface.
 - **UI Builder:** Allows for advanced screen design and customization.
- **Guided Setup Summary:** Use guided setup wizards to efficiently apply branding and other configurations.

ServiceNow Lists and Filters

Introduction to ServiceNow Lists

- **Overview:** ServiceNow lists and list views display database table contents, essential for managing incidents, problems, tasks, etc.
- **Resource:** Jeff from servicenowsimple.com introduces the lesson, encourages subscription and mentions resource links in the description.

Accessing Lists in ServiceNow

- **Application Navigator:** Use links to access various lists (e.g., Incident).
- **Dot List Command:** Use table_name.list (e.g., incident.list, task.list) to open lists for specific tables.
- **Tables of Tables:** sys_db_object.list opens the list for all tables.

List Interface Overview

- **Title Bar:** Contains the list control menu with icons and functions for list management.
- **Data Rows/Columns:** Represents records and attributes from the table.

List Control Menu

- **View:** Select and save different views with specific filters and sorting.
- **Filter:** Create and apply saved filters to display specific records.
- **Group By:** Group data by any column to see records categorized.
- **Show:** Adjust the number of records displayed per page.
- **Refresh:** Reloads the list.
- **Favorites:** Add lists to favorites for quick access with specific settings.

List Header Tools

- **Personalized List Tool:** Customize columns (add, remove, reorder) without affecting other users.
- **Filter Icon:** Opens the Condition Builder for advanced filtering.
- **Column Search:** Search within specific columns with wildcard options.
- **Breadcrumbs:** Indicate applied filters and allow navigation or removal of filters.

Column Labels and Context Menus

- **Column Labels:** Derived from database field labels; clicking toggles sorting.
- **Column Context Menu:** Options like visual task boards, charts, export, update records.

Field Context Menu

- **Options:** Includes "Show matching," "Filter out," "Copy URL," "Copy Sys ID," "Assign tag."

Record Selection and Preview

- **Checkboxes:** Select multiple records for bulk actions.

- **Actions on Selected Rows:** Execute actions on selected records.
- **Information Icon:** Provides a quick preview of the record.

Detail View Access

- **Linked Column:** First column usually links to the record's detail form.
- **Reference Data:** Fields may link to details from other tables (e.g., Caller).

Forms in ServiceNow

Lesson Overview

- **Topic:** Forms in Servicenow.
- **Forms Definition:** Interfaces for viewing, changing, or creating single records in Servicenow.

Examples of Forms

- **Incident Record Form:** Example shown for an existing record.
- **User Record Form:** Example shown for an existing user and creating a new user record.

Form Components

- **Header Bar:** Displays record type, data table, and record name.
- **Fields:** Main section with various data types (string, Boolean, choice, reference).
 - **Reference Fields:** Pull values from other tables.
 - **List Fields:** Populate multiple values.
 - **Journal Fields:** Notes visible to different users (e.g., work notes vs. additional comments).

Field Dependencies

- **Dynamic Field Behavior:** Fields may appear or disappear based on other field values (e.g., on hold reason).

Saving Changes

- **Submit vs. Update:** Save changes and close the form.
- **Save Menu:** Save changes but keep the form open.
- **Unsaved Changes Warning:** Notification if navigating away with unsaved changes.

Creating Records from Templates

- **Templates:** Automatically populate fields when creating a new record.
- **Template Bar:** Toggle on/off to access and create templates.
 - **Example:** Hardware incident template.

Form Sections

- **Sections:** Group and organize fields, displayed as tabs or collapsible containers.
- **User Preferences:** Option to organize sections as tabs via user menu.

Related Lists and Formatters

- **Related Lists:** Display lists of related records (e.g., user roles).
- **Formatters:** Special elements that display additional record-related information (e.g., activity history).

Form Views

- **Purpose:** Different views for different users (e.g., admin vs. self-service user).

- **Switching Views:** Use the form context menu to select different views.
- **Form Personalization:** Users can tweak displayed fields for their own view.

Attachments

- **Manage Attachments:** Attach files to records (e.g., screenshots).

Form Templates

- **Purpose:** Auto-populate fields based on templates.
- **Creating Templates:** Via the template bar on the form.

Creating and Editing Form Views

- **Form Design Tool:** Drag and drop interface for creating views.
- **Form Layout Tool:** Older method for adding/removing fields in a traditional manner.

A Hands-on ServiceNow Tool Demo

Introduction

- **Purpose:** Demonstrate what ServiceNow is through a live demonstration, focusing on user interface and functionality.
- **Plan:** Start with an overview of logging in and navigating ServiceNow; later provide instructions on obtaining a personal instance.

Logging into ServiceNow

- **Browser:** Use any major browser (e.g., Google Chrome).
- **URL:** Enter the URL for the ServiceNow instance to reach the login screen.
- **Instance Details:**
 - ServiceNow is a cloud-based platform providing IT services.
 - Companies get URLs for their ServiceNow instances (e.g., Production, Test, Development).
 - Login requires a user account with assigned roles (e.g., admin).

Navigating the User Interface

- **Next Experience UI:** Main interface for interacting with ServiceNow.
- **Other UIs:** Mobile apps (Android/iOS), Service Portal, Employee Center.
- **Navigation Bar Overview:**
 - **User Menu:** User settings and preferences.
 - **Show Notifications:** View notifications related to platform events.
 - **Contextual Help:** Access knowledge-base articles and help tools.
 - **Application Scope Picker:** Admin tool for managing application access.
 - **Global Search:** Search across the entire platform.
 - **Contextual App Pill:** Shows current location within the platform.
 - **Favourites:** Save frequently accessed screens or applications.
 - **Admin Menu:** Admin-specific tools.
 - **Workspaces:** Single screens with multiple widgets for specific tasks.
 - **History:** Track recent screens or actions.
 - **Favourites:** Mark important screens or applications for easy access.
 - **All Menu:** Access all applications, including custom ones.

ServiceNow Application Offerings

- **Workflows:**
 - **IT Workflows:** 79 applications for internal IT functions.
 - **Employee Workflows:** 43 applications for employee needs.

- **Customer Workflows:** 93 applications for customer-related functions.
- **Creator Workflows:** 23 applications for creating and customizing applications.
- **Applications:** Extensive list available, including Self-Service, App Engine, Employee Center, Integration Hub, Predictive Intelligence, Process Automation, and more.

Working with Lists and Forms

- **Lists:** Display multiple records from a database table.
 - **Views:** Create multiple views tailored to different needs.
 - **Filters:** Apply and save filters to customize list views.
 - **Condition Builder:** Build sophisticated filters using AND/OR conditions.
 - **Personalized List:** Customize the display of list fields for individual users.
 - **Actions on Selected Rows:** Perform bulk actions (e.g., delete, archive).
 - **New Button:** Create new records directly from the list view.
- **Forms:** Display and edit individual records from a database table.

Certification and Training

- **Certifications:** Available for various roles and applications.
- **Training:** Offered to enhance career skills or company training needs.
- **Certification Types:** Includes Implementer certifications for specific application areas.

Column Heading Features:

- **Magnifying Glass:** Search and filter records by specific columns (e.g., State, Category).
- **Sort Button:** Click to sort the column ascending or descending.
- **Column Context Menu:**
 - **Sort:** Sort records by the selected column.
 - **Show Visual Task Board:** Visual representation of tasks.
 - **Group By:** Group records by column values (e.g., State).
 - **Ungroup:** Return to a full list view.
 - **Show Pie Chart:** Visualize data in a pie chart.
 - **Import/Export Data:** Import/export records in XML format or to Excel.

Field or Row Context Menu:

- **Show Matching:** Filter to show records matching a specific field value.
- **Filter Out:** Exclude records with a specific field value.
- **Assign Tags:** Add tags to records.
- **Copy SysID:** Copy the unique identifier for the record.

Pagination Tools: Traverse through multiple pages of records.

Forms Overview:

- **Single Record View:** Displays detailed information about one record.
- **Sections and Related Lists:** Show related information such as roles and groups.
- **Form Context Menu:**
 - **Save Record:** Save changes to the record.
 - **Insert New Record:** Create a new record.
 - **Insert and Stay:** Create a new record based on an existing one.
 - **Export Record:** Export record data.
 - **Custom Views:** Create and switch between different views for specific needs.
 - **Personalize Form:** Adjust fields and layout for personal preferences.
 - **Attachments:** Add files to the record.
 - **Update Record:** Apply changes to the record.

Field-Specific Tools:

- **True/False Fields:** Display as checkboxes.
- **Reference Fields:** Use magnifying glass to look up related records.

Knowledge Application:

- **Knowledge Bases:** Libraries of articles categorized by topic.
- **Categories and Articles:** Organize articles into categories (e.g., Devices).
- **Search Function:** Find articles by keywords.
- **Article Features:**
 - **Flag:** Report inappropriate or incorrect content.
 - **Create Incident:** Create a task related to the article.
 - **Edit:** Modify article content (if permissions allow).
 - **Rate:** Provide feedback on article usefulness.
 - **Comment:** Start discussions or provide feedback on the article.

ServiceNow Database:

- **Tables Overview:** View all tables in ServiceNow, with the ability to modify or create tables.
- **CMDB:** Core database for managing infrastructure and services.

Personal Developer Instance:

- **Access:** Apply for a Personal Developer Instance to explore ServiceNow.
- **Separate Video:** Link to a video for applying for a Personal Developer Instance.

Introduction to Importing Data in ServiceNow

Introduction to Import Series:

- **Purpose:** Overview of setting up and executing a standard data import in ServiceNow.
- **Topics Covered:** Data sources, import sets, transform maps, field maps, and data import scheduling.

Terminology:

- **Source Data Entity:** The original data that needs to be imported.
- **Target Entity:** The destination in ServiceNow where the data should be loaded.

Intermediate Data Entity:

- **Staging Table:** Also known as an import set table in ServiceNow.
 - **Function:** An intermediary table created by ServiceNow to temporarily hold data during the import process.
 - **Creation:** Automatically generated by ServiceNow during the import; no manual creation required.

Import Process Overview:

- **Three Data Entities:**
 - **Source Data:** The original data to be imported.
 - **Staging Table:** Temporary table created by ServiceNow.
 - **Target Data Store:** The final destination within ServiceNow for the imported data.

Creating a Data Source in ServiceNow

Introduction :

- **Topic:** Creating a Data Source in ServiceNow.
- **Review of Note 1:** Discussed the concept of source, staging table, and target entity in the import process.

Creating a Data Source:

- **Purpose:** Define and configure the data source, specifying the source type, connection details, and how the staging table should be named.
- **Data Source:** A record in ServiceNow that stores parameters for the import process.

Steps to Create a Data Source:

- **Navigate to Data Source Table:**
 - **Table Name:** 'sys_data_source'
 - **Access:** Use Application Navigator or filter navigator ('sys_data_source.list').
- **Create a New Data Source:**
 - **Action:** Click "New" to open the form for creating a data source.
 - **Name:** Provide a name for the data source (e.g., "test import").
 - **Label:** Set the label for the staging table.
 - **Table Name:** Automatically generated based on the label (e.g., u_test_import).

Data Source Type:

- **File:** For importing data from files such as CSV or Excel.
 - **File Type:** Choose file format (e.g., Excel, CSV).
 - **File Retrieval Method:** Use attachment for simplicity.
- **JDBC:** For connecting to databases (e.g., Oracle, SQL Server).
 - **Parameters:** Enter database details such as server name, port, username, and password.

Data Source Configuration:

- **File Details:**
 - **Format:** Choose the format (e.g., Excel).
 - **Sheet Number:** Specify if applicable.
 - **Header Row:** Ensure the header row is included for field mapping.
- **Attachment:** Attach the file to the data source.

Submit and Save:

- **Action:** Click "Submit" to save the data source record.
- **Verification:** Confirm the data source appears in the list with the correct type and parameters.

Excel Spreadsheet Example:

- **Content:** Includes columns such as Name, Address, City, State, ZIP.
- **Header Row:** Used to create fields in the staging table.

Understanding Import Sets in ServiceNow

Introduction :

- **Focus:** Staging Table (Import Set Table) in ServiceNow.
- **Context:** Building on Note 2, which covered creating a data source.

Review of Previous Note:

- **Data Source Creation:** Configured a data source record in the 'sys_data_source' table.
- **Staging Table:** Parameters for creating the staging table were set (name and label).

Testing the Data Source:

- **Navigate to Data Source:**
 - **Access:** Use 'sys_data_source.list' in the Application Navigator.
 - **Review:** Confirm data source record details (label, table name).
- **Table Verification:**
 - **Check Table:** The staging table ('u_test_import') does not exist yet because no import has been run.

Running an Import:

- **Action:** Test the data source by running an import.
 - **Import Options:** Choose to load all records (5 in this case).
 - **Process:** ServiceNow creates the staging table if it doesn't exist, pulls data, and loads it into the staging table.
 - **Result:** Success message showing 5 records processed and inserted.

Viewing the Staging Table:

- **Access:** Use 'u_test_import.list' to view the staging table.
- **Structure:** The staging table now has 5 rows (corresponding to the 5 records from the spreadsheet).
- **Column Configuration:** Check columns to ensure they match the header row in the source file.

Re-import and Management:

- **Re-run Import:** Import data again to demonstrate record management.
 - **Result:** Two imports resulted in 10 records in the staging table (5 from each run).
- **Import Set Table:**
 - **Table Name:** 'sys_import_set'
 - **Purpose:** Manages import sets or groups.
 - **Records:** Each record in this table represents an import run. Example: iset10036 and iset10037.

Import Set Table Details:

- **Purpose:** Each import run creates a record in the 'sys_import_set' table.
- **Reference:** Records in the staging table link back to the import set record to track which import they belong to.
- **Review:** Confirm that records in the staging table have references to the correct import set

ServiceNow Transform Maps & Field Maps

Introduction to Transform Maps and Field Maps

- **Series Context:**
 - Previous notes covered creating and testing data sources and staging tables.
 - This note focuses on mapping data from staging to target tables using transform maps and field maps.

Definitions:

- **Field Maps:**
 - Define how data moves from the staging table to the target table on a field-by-field basis.
 - Each field mapping is stored as a record in the CIS_transform_entry table (labelled as "Field Map").
- **Transform Maps:**
 - Group field maps together to represent the entire import process.
 - Stored in the CIS_transform_map table (labelled as "Transform Map").

Setup Process:

- **Custom Table for Target:**
 - Custom table created for demonstration:
 - Label: My Table
 - Actual name: u_my_table
 - Fields: username, address, city, state, zip_code.
- **Creating Transform Map:**
 - Go to CIS_transform_map.list and create a new record.
 - Provide a name (e.g., test_transform_map).
 - Set the source table (e.g., test_import - the staging table).
 - Set the target table (e.g., u_my_table - the custom table).
- **Adding Field Maps:**
 - Use the "Mapping Assistant" tool to automatically or manually map fields from the staging table to the target table.
 - Field maps created:
 - name -> username
 - address -> address
 - city -> city
 - state -> state

- zip -> zip_code

- **Coalesce Field:**

- Coalesce field used to prevent duplicate records.
- Definition: Coalesce means to come together or match.
- Set coalesce field on the field map record to avoid duplicates. (e.g., using name as the coalesce field)

Review:

- **Field Maps Table:**

- Table: CIS_transform_entry
- Shows 5 field maps created.

- **Transform Maps Table:**

- Table: CIS_transform_map
- Shows 1 record with related field maps.

ServiceNow Incident Management Tutorial and Task Administration

Introduction

- **ServiceNow Vision:** Designed to make work as efficient as possible with task management as a primary function.
- **Lesson Focus:** Task management in ServiceNow, including the task table and core components.

Instructor and Series Overview

- **Instructor:** Jeff Teist, with 30+ years in software development and technical architecture.
- **Series Purpose:** Repackaging and simplifying notes from the ServiceNow fundamentals learning path for CSA certification exam preparation.
- **Content:** 27 videos covering CSA certification and improving ServiceNow skills.

Task Definition and Table

- **Task in ServiceNow:** A record in the database representing an item of work, stored in the "task" table.
- **Common Fields:** Description, status, due date, and responsible user.
- **Viewing Tasks:** Use task.list in the app navigator to see records in the task table.

Hierarchical Database Design

- **Extension of Task Table:** Tables like Change Request, Incident, and Problem extend the task table, inheriting common attributes and adding specific ones.
- **Creation of Records:** You create records in these extended tables, which automatically generate task records.

Business Value of Task Management

- **Process Efficiency:** Allows building repeatable processes for common tasks.
- **Features:**
 - **Assignment Rules:** Automatically assign tasks to users/groups.
 - **Approvals:** Manage approval processes manually or automatically.
 - **Service Level Agreements (SLAs):** Track completion timeframes.
 - **Inactivity Monitors:** Notify when tasks are untouched.
 - **Workflows:** Apply workflows to tasks based on conditions.

Task Assignment

- **Assignment Fields:** assigned_to and assignment_group fields.
- **User and Group Tables:** Manage users and groups, allowing tasks to be assigned accordingly.
- **Assignment Rules:**
 - **Definition:** Rules to automatically assign tasks based on conditions.
 - **Table:** Stored in sys_rule_assignment.

- **Execution Order:** Determines the order in which rules are applied.
- **Example:** Creating an assignment rule to assign hardware incidents to a specific group and user.

Assignment Lookup Rules

- **Limitations:** Only applicable to incidents and with a limited set of fields for conditions.
- **Comparison:** Less powerful than assignment rules.

Working on Tasks

- **Service Desk Application:** Use to access tasks assigned to yourself or your group.
- **Collaboration Tools:**
 - **User Presence:** View and update records simultaneously with others.
 - **Real-Time Editing:** See updates as they happen.

Visual Task Boards

- **Purpose:** Provide a graphical, drag-and-drop interface to manage tasks.
- **Components:**
 - **Cards:** Represent tasks.
 - **Lanes:** Group tasks by attributes (e.g., category).
 - **Quick Panel:** For filtering and user assignment.
- **Types of Boards:**
 - **Guided Boards:** Created from lists with predefined attributes.
 - **Flexible Boards:** Created from lists with non-predefined attributes.
 - **Freeform Boards:** Personalized boards not tied to existing records.

Creating and Using Boards

- **Guided Board:** Based on attributes with predefined values.
- **Flexible Board:** Lanes are customizable; does not impact task values.
- **Freeform Board:** Personalized and not tied to records.

ServiceNow Reporting Tutorial

Overview

- **Series Theme:** Teaching ServiceNow through a data-driven approach.
- **Focus:** Reporting capabilities in ServiceNow.

Key Points

- **Core Concept:** Everything in ServiceNow is a record in a database.
- **Reporting Capabilities:** Covers creating, managing, publishing, and sharing reports.

Underlying Data Model

- **Main Tables:**
 - **sys_report:** Stores records for each report.
 - **sys_report_source:** Stores reusable queries for reports.
 - **sys_auto_report:** Manages scheduling and emailing of reports.
 - **sys_report_users_groups:** Manages sharing of reports with users or groups.
 - **pa_dashboard:** End table for dashboards that display reports.

Report Table (sys_report)

- **Fields:**
 - **sys_id:** Unique ID of the report.
 - **title:** Title of the report.
 - **source_type:** Indicates the data source (table or data source).
 - **source:** Specifies the data source record if source_type is data source.
 - **table:** Primary table for report data.
 - **field_name:** Field used for grouping data.
 - **filter:** Conditions to filter data for the report.
 - **type:** Type of report (e.g., list, bar chart, pie chart).

Report Types

- **Examples:** Lists, Box, Bar, Pivot, Trends, Line, Control, Spline, Area, Histogram, Heat Map, Map, Calendars, Bubble, Funnel, Pyramid, Donuts, Pie, Speedometer, Dial, Single Score.

Creating a Report

- **Methods:**

- **Reports Application:** Use the "Create New" module.
- **ServiceNow Studio:** Use the Studio application to create a new report.
- **From List View:** Create a report directly from an existing list view.

Report Creation Process

- **Steps:**
 - Set **title**.
 - Choose **source_type** (table or data source).
 - Select **table** and set **type** (visualization).
 - Configure **group by** field and additional styling.
 - **Save** the report.

Scheduling Reports

- **Table:** sys_auto_report
- **Fields:**
 - **sys_id:** Unique ID.
 - **report:** Reference to the report being scheduled.
 - **users:** List of user references.
 - **groups:** List of group references.
 - **email_addresses:** Manually entered email addresses.
 - **run:** Recurrence (daily, weekly, monthly, on-demand).
 - **time:** Time of execution
 - **subject:** Email subject.
 - **introductory_message:** Email body.
 - **condition:** Script for conditional execution.
 - **type:** Attachment type (PDF, Excel, etc.).

Sharing Reports

- **Table:** sys_report_users_groups
- **Options:**
 - Share globally, by role, or with specific users/groups.

Adding Reports to Dashboards

- **Process:**

- Add reports to dashboards through the dashboard interface or directly from the report's sharing options.

Conclusion

- **Action Items:**
 - Create, manage, schedule, and share reports effectively.
 - Add reports to dashboards for better data visualization.
- **Call to Action:** Like, subscribe, and provide feedback.