

# Automating Employee Data

## Problem Statement:

Your organization wants to regularly import a list of new employees with their details, such as Name, Email, Department, and Manager, from an external system. Once imported, when an Incident is assigned to an employee, the Incident form should automatically show the manager's email of the employee's department. However, the Priority field on the Incident should default to a different value from the other child tables of the Task table because incidents often require urgent attention based on impact and urgency.

## Objective:

The objective of this scenario is to automate the import of employee data, display department manager information directly on incidents, and set a custom priority default for incidents to improve data accuracy, provide quick access to relevant information, and streamline the incident resolution process in ServiceNow.

**Skills:** Import sets, Dot Walking, Dictionary Override

## TASK INITIATION

### Milestone 1 : Import data from data source

#### Activity 1: Create records in the Sheet

1. Open google sheet
2. Name the fields as name,email,department manager and manager's email
3. Enter some records
4. Save the sheet as: employee data
5. Download the file as .xlsx , .csv (or) .xml file

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	NAME	EMAIL	DEPARTMENT	MANAGER	MEMAIL									
2	preethi d	priti@gmail.com	servicenow	rakesh	rakesh@gmail.com									
3	udaya priyanka	priya@gmail.com	salesforce	rakesh	rakesh@gmail.com									
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## Activity 2: Import data

1. Open service now.
2. Click on All >> search for import sets
3. Select load data under system import sets
4. select create table
5. Give the the import set table name as: import employee
6. Choose the file which we created in the XL sheet.

The screenshot shows the ServiceNow Load Data interface. On the left, a sidebar menu under 'System Import Sets' includes options like 'Load Data', 'Create Transform Map', 'Run Transform', 'Administration', 'Data Sources', 'Robust Import Set Transformer...', 'ETL Definitions', 'Transform Maps', 'Scheduled Imports', 'Execution Contexts', 'Advanced', 'Import Sets', 'Concurrent Import Sets', 'Concurrent Import Set Jobs', and 'Multi Import Sets'. The main panel is titled 'Load Data' and contains a form for creating an import set. The 'Import set table' section has 'Create table' selected, with 'Label' set to 'import employee' and 'Name' set to 'u\_import\_employee'. The 'Source of the import' section has 'File' selected, with 'File' set to 'Choose File employee data.xlsx', 'Sheet number' set to '1', and 'Header row' set to '1'. A 'Submit' button is at the bottom right.

7.The data is imported,click on personalized list

8.Add fields to the form.

The screenshot shows the ServiceNow interface with a 'Personalize List Columns' dialog open over a list view titled 'import employees'. The dialog lists available columns on the left and selected columns on the right. Available columns include Comment, Created, Created by, Import set run, Row, Set, State, Target table, Target record, Tags, Template Import Log, Transform Map, Type, Updated, Updated by, and Updates. Selected columns include Row, Set, State, Target table, Target record, Error, NAME, EMAIL, DEPARTMENT, MANAGER, and M.EMAIL. At the bottom of the dialog are checkboxes for 'Wrap column text', 'Modern cell coloring', 'Enable list edit', 'Compact rows', 'Active row highlighting', and 'Double click to edit'. Buttons for 'Reset to column defaults', 'Cancel', and 'OK' are also present.

The screenshot shows the ServiceNow web interface. The top navigation bar includes links for WhatsApp, Script Scenarios, Search results, Preethi Optimiz, Copy of Preethi, ServiceNow Dev, Import employee, Reopen Incident, and several others. The main title bar says "import employee data". The left sidebar has sections for Favorites, History, Workspaces, Admin, and All Results, with "import employee data" selected under System Import Sets. The main content area displays a table titled "import employee data" with columns: NAME, EMAIL, DEPARTMENT, MANAGER, State, and Error. Two rows are listed: one for priyanka (email 456@gmail.com, department salesforce, manager rakesh) and one for preethi (email 123@gmail.com, department servicenow, manager rakesh). Both rows show "Inserted" in the State column and "(empty)" in the Error column. Below the table, there are "Related Links" for Import Sets, Transform Maps, Transform History, and Edit Web Service. The bottom status bar shows the date (28-10-2024), time (17:00), battery level (ENG IN), and weather (29°C, Mostly sunny).

NAME	EMAIL	DEPARTMENT	MANAGER	State	Error
priyanka	456@gmail.com	salesforce	rakesh	Inserted	(empty)
preethi	123@gmail.com	servicenow	rakesh	Inserted	(empty)

## Activity 3: Create transform map

1. Open service now.
2. Click on All >> search for import set
3. Select create transform map under import sets
4. Click on new
5. Fill the following details to create a new transform map
6. Give name as: Employee data transform
7. Select source table: import employee data
8. Select target table: user[sys\_user]
9. Save the form.

The screenshot shows the ServiceNow interface for creating a Table Transform Map. The left sidebar has a 'Import Sets' section under 'System Import Sets'. The main area displays the 'Table Transform Map - transform employee data' form. The form includes fields for Name (transform employee data), Application (Global), Created (2024-10-28 21:54:35), Source table (import employee [u\_import\_e...]), Target table (User [sys\_user]), Active (checked), Run business rules (checked), Enforce mandatory fields (No), Copy empty fields (unchecked), Create new record on empty (coalesce fields), and Order (100). Below the form is a 'Related Links' section with links to Auto Map Matching Fields, Mapping Assist, Validate Coalesce Fields, and Run Point Scan. At the bottom is a 'Field Maps' tab.

## Activity 4: Match the fields using mapping assist

1. Scrolled down the created transform map form
2. Click on auto matching fields
3. Then in the mapping fields some fields are matched

The screenshot shows the ServiceNow Table Transform Map interface for the 'transform employee data' table. The left sidebar navigation includes 'Import Sets' under 'System'. The main area displays a table of field mappings:

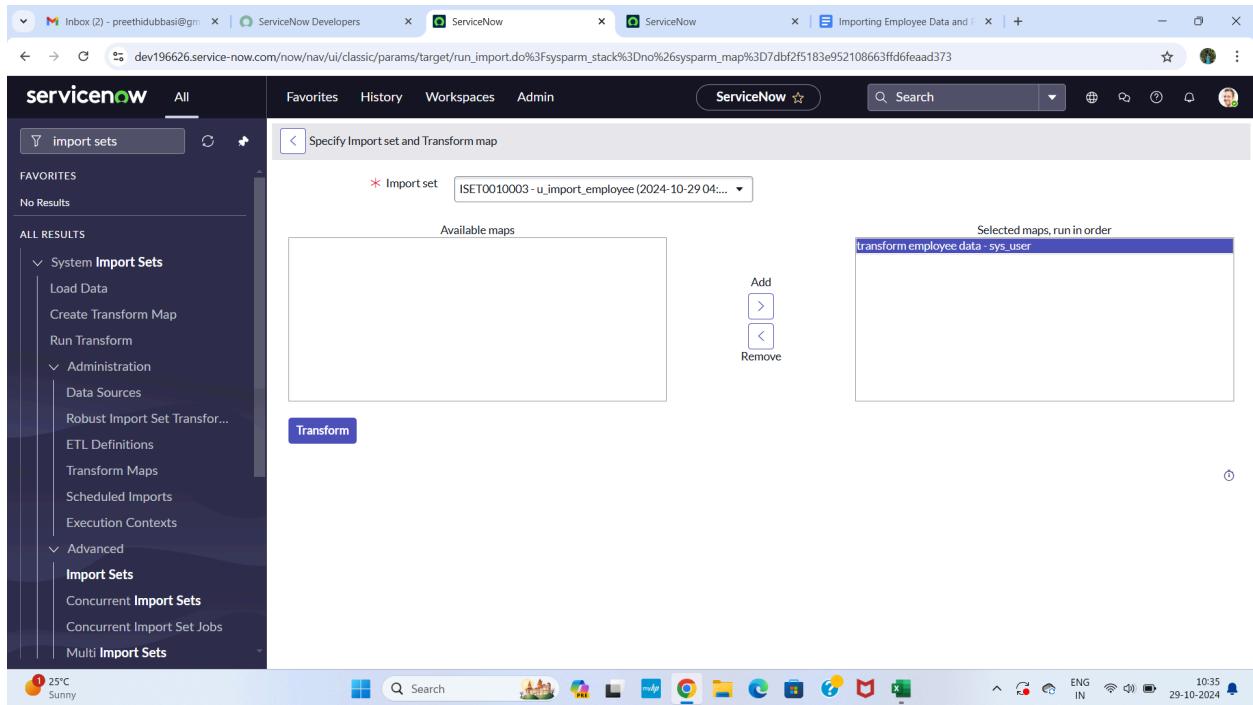
Source field	Target field	Coalesce
<code>u_email</code>	<code>email</code>	false
<code>u_department</code>	<code>department</code>	false
<code>u_name</code>	<code>name</code>	false

4. Using mapping assist map the manager field.
5. Select the fields which you are mapping in the staging table and target table
6. Select manager in source table and add
7. Select manager field in target table
8. Click on the save button.

The screenshot shows the ServiceNow Mapping Assist interface. On the left, the 'Source: import\_employee' table lists fields: EMAIL, Error, Import set run, M\_EMAIL, MANAGER, NAME, Row, Set, State, and \_ID. On the right, the 'Field Map' section shows a mapping from 'EMAIL' to 'Email', 'DEPARTMENT' to 'Department', 'NAME' to 'Name', and 'MANAGER' to 'Manager'. The 'Target: User' table on the far right lists fields: Location, Locked out, Middle name, Mobile phone, Notification, Password, Password needs reset, Photo, Prefix, and Roles. A 'Data Viewer' at the bottom shows the 'import\_employee' record with fields: Comment (Active), Created (2024-10-28 21:48:19), and Created by (admin). It also shows a 'User' record with fields: Field (Active), Value (true).

## Activity 5: Transform the Data

1. Click on transform in the related links.
2. Click on transform.
3. Data's transform state is completed.



The screenshot shows the ServiceNow web interface with a progress bar indicating the completion of an import set. The progress bar details are:

- Name: Transforming:ISET0010003
- State: Complete
- Completion code: Success
- Message: Transformation complete

Next steps listed are:

- ISET0010003: Go to the import sets for this data load
- Transform history: Show the transform history, related errors and log
- Import log: View the import log

The left sidebar shows the navigation menu under System Import Sets, including Load Data, Create Transform Map, Run Transform, Administration (Data Sources, Robust Import Set Transfor..., ETL Definitions, Transform Maps, Scheduled Imports, Execution Contexts), Advanced (Import Sets, Concurrent Import Sets, Concurrent Import Set Jobs, Multi Import Sets).

4. Click on ISET0010003 under next steps

5. Two rows are inserted.

The screenshot shows the details of the Import Set - ISET0010003. The import set configuration includes:

- Data source: import employee.xlsx (Uploaded)
- Import set table: import employee [u\_import\_employee]
- Short description: Type: File, Format: Excel

Below the configuration, the Import Set Runs table shows:

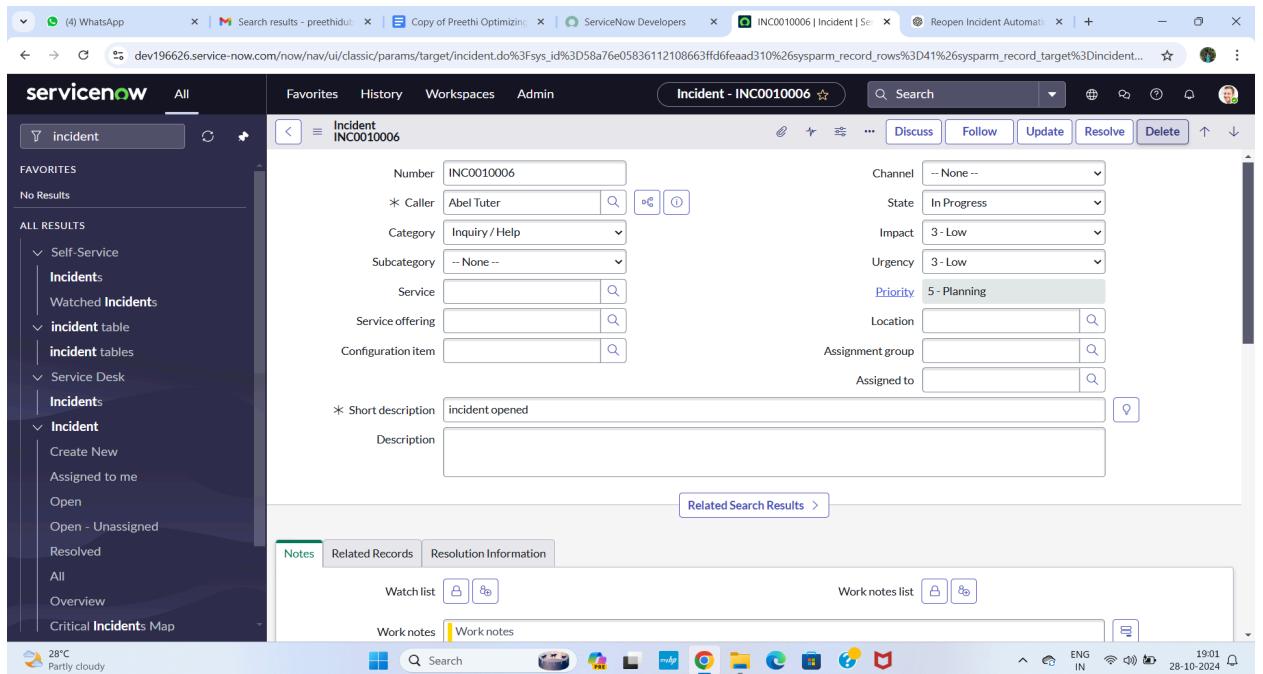
Started	State	Completed	Run time	Total	Inserts	Updates	Processed	Ignored	Skipped	Errors
2024-10-28 22:10:47	Complete	2024-10-28 22:10:47	0 Seconds	2	2	0	0	0	0	0

The left sidebar shows the navigation menu under System Import Sets, including Load Data, Create Transform Map, Run Transform, Administration (Data Sources, Robust Import Set Transfor..., ETL Definitions, Transform Maps, Scheduled Imports, Execution Contexts), Advanced (Import Sets, Concurrent Import Sets, Concurrent Import Set Jobs, Multi Import Sets).

## Milestone 2: Dot walking

### Activity 1: Display department to the assigned to user

1. Open service now.
2. Click on All >> incident
3. Select create new under incidents
4. There is no field like department in the form
5. Email and manager fields are not visible



6. By using dot walking retrieve the data without opening the record
7. Click on context menu go to configure and select form layout
8. Select assigned to.department as mentioned below
9. Click on save.

10. Add another field assignment.email.
11. Also add assignment.manager field
12. Click on save.

The screenshot shows the ServiceNow CMDB interface with the title 'Configuring Incident form'. In the 'Available' section, fields like 'Active', 'Activity due', and 'Assigned to' are listed. The 'Selected' section has 'Assigned to Manager' highlighted. A 'Create new field' section is on the right.

13. Open an incident form
14. Fill the mandatory fields and assigned to just imported user
15. Then department and email field is automatically filled

The screenshot shows the ServiceNow incident creation screen. The 'Assigned to' field is highlighted with a red box, showing 'priyanka b' and 'priya@gmail.com'. Other fields like 'Number', 'Category', and 'Description' are also visible.

## Milestone 3 : Dictionary override

### Activity 1: Make the state to 3-moderate in incident

1. Take existing extended table or
2. Create one table as: incident table which is extended from task
3. So task table fields are automatically assign to extended table
4. Open the duplicate tab
5. Click on All> incident table
6. Open the incident table and priority have 4

The screenshot shows the ServiceNow web interface for creating a new incident record. The URL in the address bar is `dev196626.service-now.com/nav/ui/classic/params/target/u_incident_table.do?%3Fsys_id%3D-1%26sys_is_list%3Dtrue%26sys_target%3Du_incident_table%26sysparm_checked_items%3D%26...`. The page title is "incident table - Create TASK0020278".

The left sidebar navigation shows the following hierarchy under "Incident": Self-Service > Incidents > Watched Incidents; Incident table; Incident tables; Service Desk > Incidents; Incident. Under Incident, there are links for Create New, Assigned to me, Open, Open - Unassigned, Resolved, All, Overview, and Critical Incidents Map. The status bar at the bottom indicates it's 28°C Partly cloudy.

The main form fields are:

- Number: TASK0020278
- Assigned to: (empty)
- Configuration item: (empty)
- Priority: 4 - Low
- State: Open
- Parent: (empty)
- Active: checked
- Short description: (empty)
- Description: (empty)
- Work notes: (highlighted in yellow)

A "Submit" button is located at the bottom left of the form area.

7. Open incident table tab
8. In columns select priority default value is 4 and task table have same default value.

The screenshot shows the ServiceNow interface for managing tables. The left sidebar has a tree view with 'Tables' expanded, showing 'Archive Tables', 'System Clone', 'Exclude Tables', 'System Definition', and 'Tables & Columns'. Under 'Tables & Columns', 'Decision Tables' is expanded, showing 'Remote Tables' with 'Tables' and 'Definitions', and 'Session Debug' with 'Debug SQL (Large Tables)'. The main content area is titled 'Table - incident table'. It shows the table's label as 'incident table' and name as 'u\_incident\_table'. A note says it's a collection of records in the database. Below this is a table of columns:

Column label	Type	Reference	Max length	Default value	Display
Variables	Variables	(empty)	40		false
Effective number	String	(empty)	40		false
Task type	System Class Name	(empty)	80	javascript:current.getTableName();	false
Assignment group	Reference	Group	32		false
Duration	Duration	(empty)	40		false
Correlation display	String	(empty)	100		false
Transfer reason	Integer	(empty)	40		false
Parent	Reference	Task	32		false
Close notes	String	(empty)	4,000		false

9. Use dictionary override method
10. Change the default value of priority field in one incident table
11. Scrolled down select dictionary override
12. Click on new
13. Select table as: incident table[u\_incident\_table]
14. Column name is priority
15. Click on override default value
16. Enter default value 3
17. Click on submit

The screenshot shows the ServiceNow dictionary entry override configuration for the 'priority' field. The 'Task display column: number' section is selected. The 'Base table' is set to 'Task [task]' and the 'Column name' is 'priority'. The 'Override default value' checkbox is checked, and the 'Default value' is set to '3'. Other options like 'Override calculation' and 'Override mandatory' are unchecked.

18. Open incident table and check the priority field

19. Priority is changes to 3-moderate

The screenshot shows the ServiceNow incident table creation screen. A new record is being created with the number 'TASK0020279'. The priority is set to '3 - Moderate'. Other fields like 'Assigned to', 'State', 'Configuration item', 'Active', 'Short description', 'Description', and 'Work notes' are also visible. The 'Submit' button is at the bottom left.

## **Conclusion :**

In this scenario, we streamlined incident management in ServiceNow by automating the import of employee data, displaying department manager information directly on incidents, and setting a custom priority default specifically for incidents. This setup saves time, ensures data accuracy, and gives incident handlers quick access to relevant information, making incident resolution faster and more efficient.