

Lab Guide

Codeless Configuration: Tips and Tricks

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Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

This
Page
Intentionally
Left
Blank

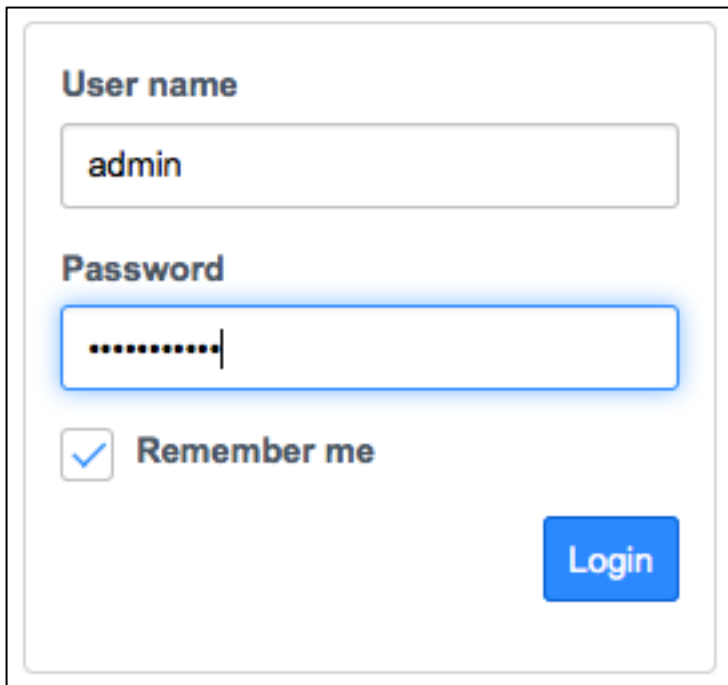
Lab Goal

The **Edge** toolbar lets you create quick links to commonly used resources. This lab explains how to create a global bookmark available to all users who want to access the Report Lab Progress module in the Lab Management application.

Lab 1 Add a Bookmark for all Users

Log on to Your Training Instance

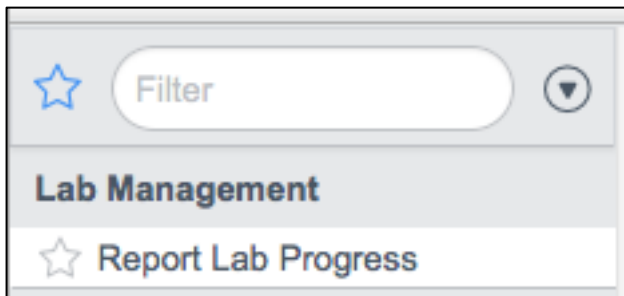
1. Navigate to the unique instance URL provided to you.
2. Log on with provided credentials.



The screenshot shows a login interface within a light gray border. At the top, the text "User name" is in bold. Below it is a text input field containing the word "admin". Underneath that, the text "Password" is in bold, followed by a password input field filled with dots. Below the password field is a checkbox with a blue checkmark icon and the text "Remember me". In the bottom right corner of the form is a blue button with the text "Login" in white.

Add a Shortcut to the Edge

1. In the **Left Navigation Pane**, click **Lab Management** to expand the Lab Management application.
2. Click the **Report Lab Progress** module to display this application in the main pane of the browser.



NOTE: In subsequent labs, these steps are abbreviated to **Application Name > Module Name**.

3. **Observe** how the custom application allows you to communicate with lab instructors.
4. On **Report Lab Progress**, click and hold down the mouse left button.
5. Still holding the mouse button down, drag the mouse to the **Edge** along the left side of the browser window.

NOTE: In subsequent labs these steps will be abbreviated to **drag and drop**.

- When the main screen dims, release the mouse button to place the shortcut on the **Edge**.



Modify the Bookmark

- Navigate to **System Definition > Bookmarks**.
- To the left of the **Lab Management > Report Lab Progress** record, click the **Information** icon



to edit the record.



- Place a checkmark next to **Auto add**.

Pinned	<input checked="" type="checkbox"/>
Auto add	<input checked="" type="checkbox"/>

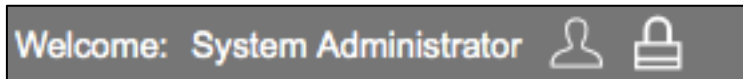
- In the **User** field, remove **System Administrator**.

User	<input type="text"/>	<input type="button" value="Search"/>
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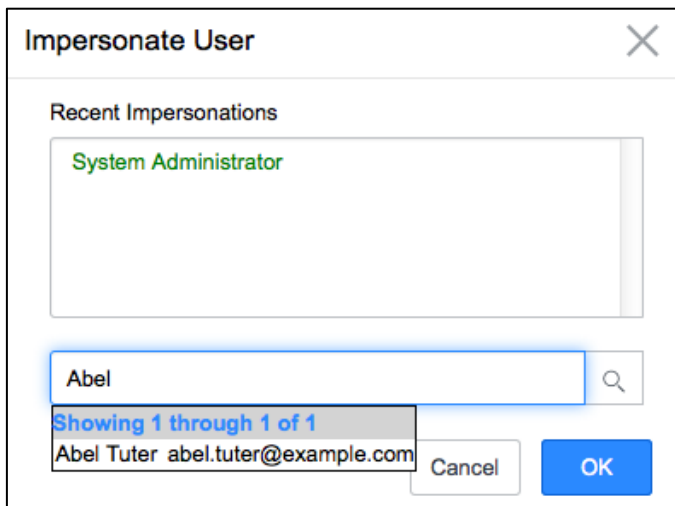
- Click **Update** to save the changes.

Lab Success Verification

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.



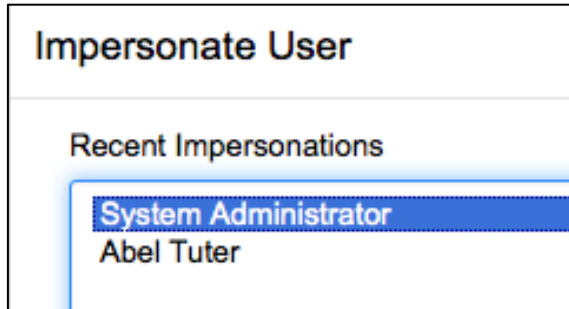
2. Type **Abel** and select the **Abel Tuter** user.



3. Click **OK**.
4. Verify that the **Lab Management > Report Lab Progress** button is on the **Edge**.
5. Click the **Person** icon next to **Impersonating: Abel Tuter** to bring up the Impersonate User window.



6. Double-click **System Administrator** to return to this user.

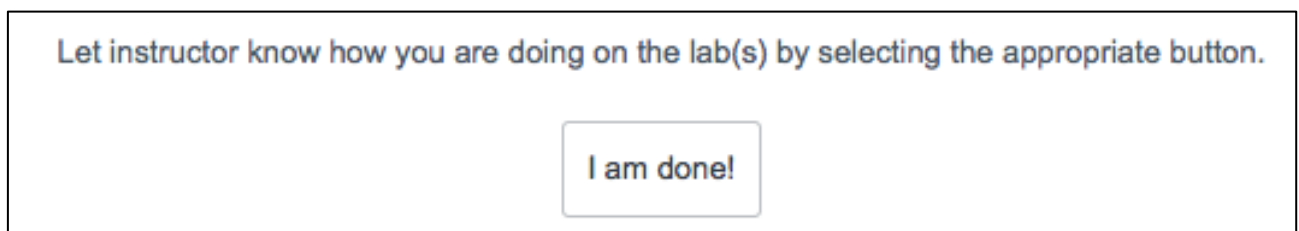


7. Navigate to **Lab Management > Report Lab Progress**.

8. Enter any comments regarding this lab.

A screenshot of a form section titled "Comments and questions:". Below the title is a large, empty rectangular text input box with a thin border and a small diagonal line in the bottom right corner, indicating it is a text area.

9. In the main window, click the **I am done!** button.

A screenshot of a form section. At the top, there is a text prompt: "Let instructor know how you are doing on the lab(s) by selecting the appropriate button." Below this prompt is a single button with the text "I am done!" inside it.

NOTE: In subsequent labs, use Report Lab Progress to inform the instructors when you need assistance or when you have completed a lab. Feedback is encouraged and appreciated!

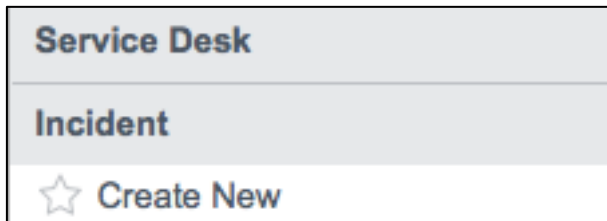
Lab Goal

How can you make lists and forms more usable? One way is to use color consistency. This lab explains how to add color to a form or list field, based on its value.

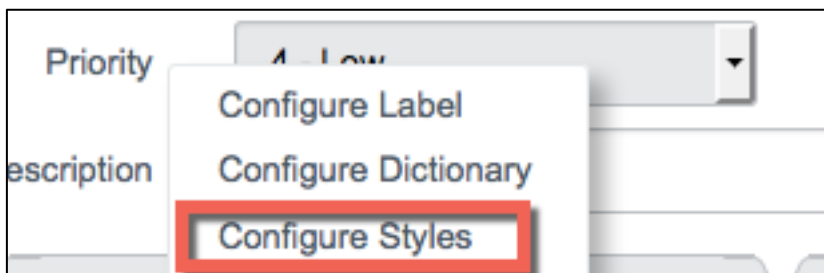
Lab 2 Color Code Fields and Lists

Edit the Priority Field

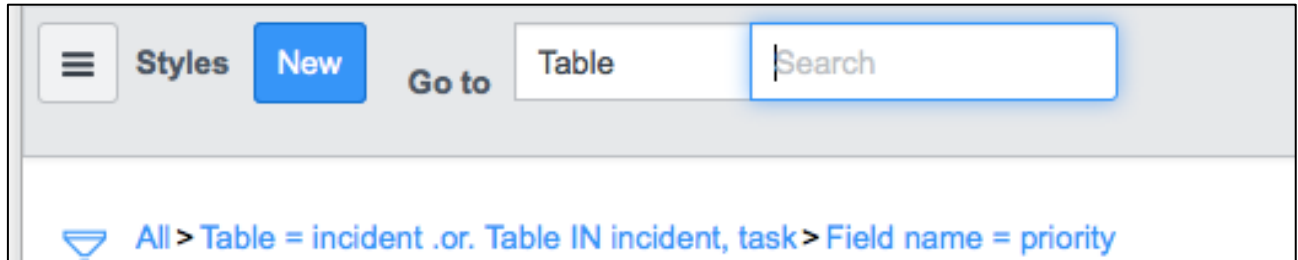
1. Navigate to **Incident > Create New**.



2. Right-click the **Priority** field and select **Configure Styles**.

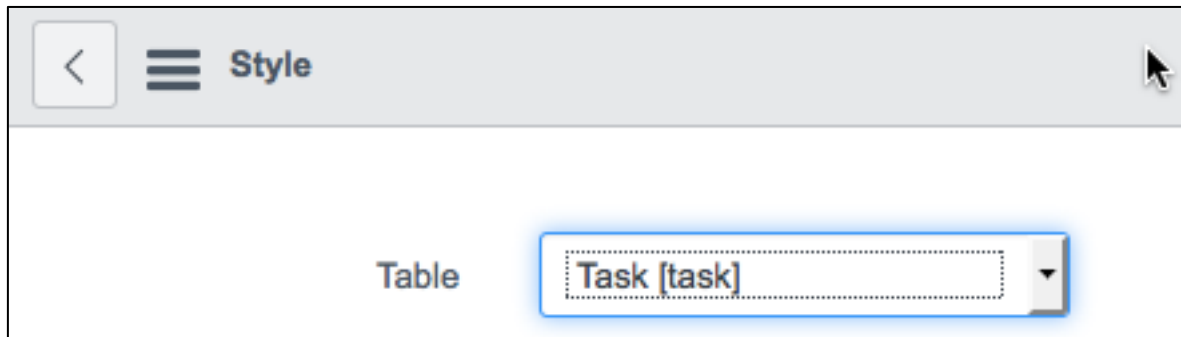


3. Click the **New** button.



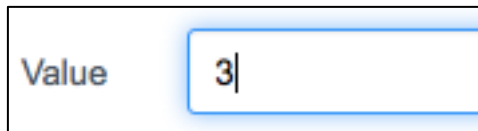
The screenshot shows a navigation bar with a hamburger menu icon, the text 'Styles', a blue 'New' button, the text 'Go to', a 'Table' dropdown menu, and a search box. Below the navigation bar, a breadcrumb trail is visible: 'All > Table = incident .or. Table IN incident, task > Field name = priority'.

4. Set the **Table** drop-down list to **Task [task]**.



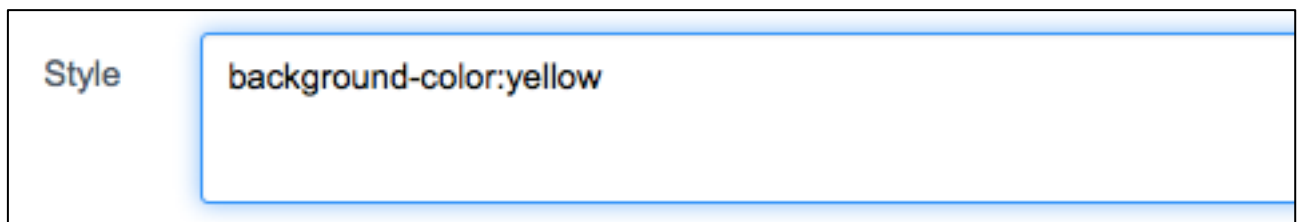
The screenshot shows a 'Style' configuration page. At the top, there is a back arrow, a hamburger menu icon, and the text 'Style'. Below this, the label 'Table' is followed by a dropdown menu that has 'Task [task]' selected. A mouse cursor is pointing at the dropdown arrow.

5. Set the **Value** to **3** to change the Moderate color.



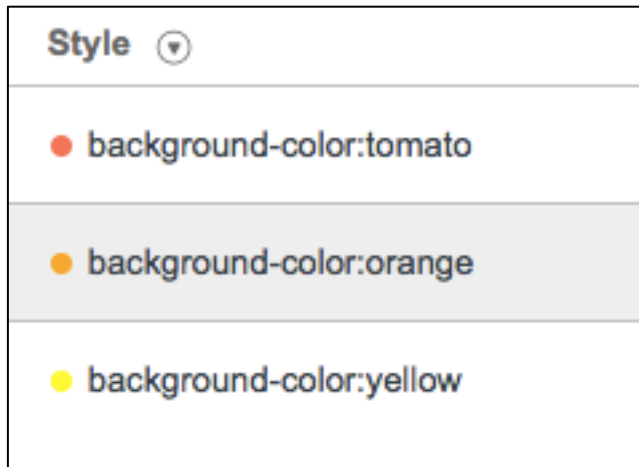
The screenshot shows a 'Value' field with the number '3' entered. The field is highlighted with a blue border.

6. In the Style field, type **background-color:yellow** and click **Submit**.



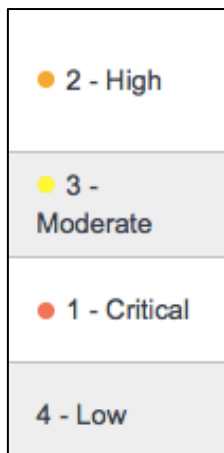
The screenshot shows a 'Style' field with the text 'background-color:yellow' entered. The field is highlighted with a blue border.

7. The color set for the Incident Priority listing appears.



Lab Success Verification

1. Navigate to **Incident > All**. Your screen should look like this:



2. Navigate to **Lab Management > Report Lab Progress**.

3. Enter any comments regarding this lab.

Comments and questions:

4. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

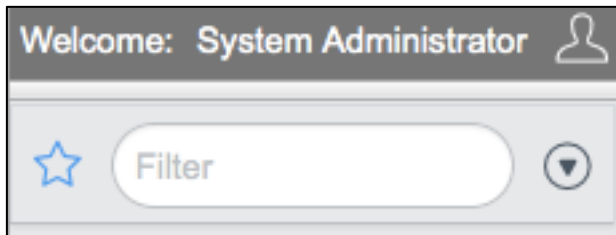
Lab Goal

This lab explains how to add a **Save** button onto your forms, by editing the **System Properties** to change the settings for all users.

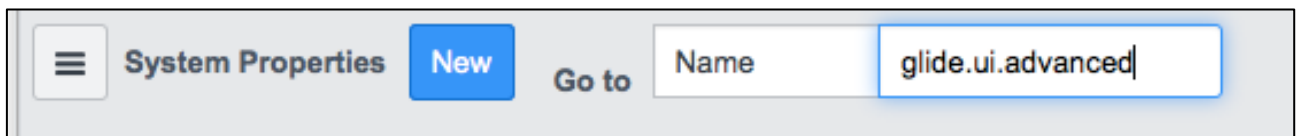
Lab 3 Add Save and other Buttons

Edit the System Properties

1. In the **Type Filter Text** field, type **sys_properties.list**, but do not press the **Enter** key.



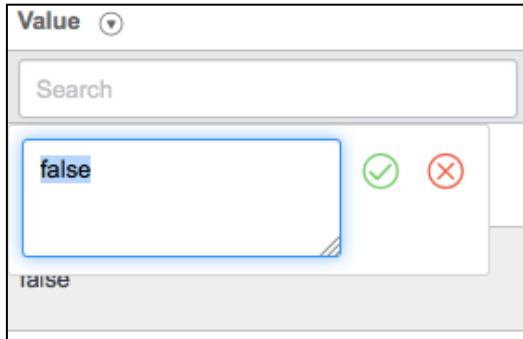
2. In the **Go to** drop-down list, select **Name**.
3. In the **Go to Name** field, type **glide.ui.advanced** and press **Enter**.



4. Hover the mouse over the **glide.ui.advanced** **Description** to see what the property does.

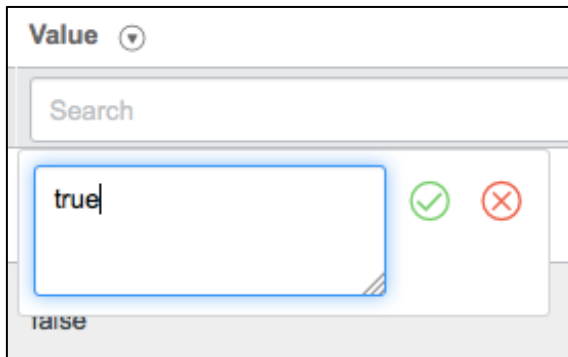


5. In the **Value** column for **glide.ui.advanced**, double-click on **false** to edit the field.



A screenshot of a form titled "Value" with a dropdown arrow. Below the title is a search bar labeled "Search". The main content area shows a text input field containing the word "false". To the right of the input field are two circular icons: a green checkmark and a red X. Below the input field, the word "false" is also visible, suggesting a list of suggestions or a confirmation prompt.

6. In the **Value** field for **glide.ui.advanced**, replace false with **true**.



A screenshot of the same form titled "Value". The text input field now contains the word "true". The green checkmark and red X icons remain to the right. The word "false" is still visible below the input field.

7. Click the **Green** checkmark.

NOTE: You can right-click the bar at the top of a form and click **Save**. Administrators can also edit this property by editing the Save UI Action.

Lab Success Verification

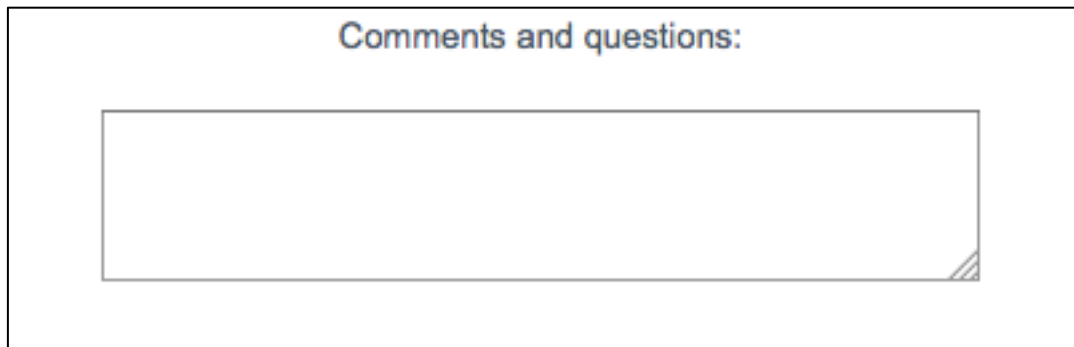
1. Click **glide.ui.advanced** to open the system property record.

Your screen should look like this (with **Save**, **Insert & Insert and Stay** buttons on the form):



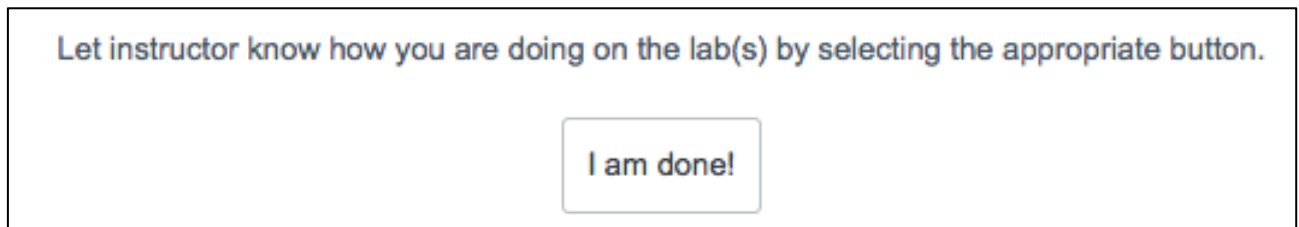
The screenshot shows a web form titled "System Property - glide.ui.advanced". The form has a header bar with navigation icons and buttons: Update, Insert, Insert and Stay, Save, and Delete. Below the header, there is a field for "Name" with the value "glide.ui.advanced" and a field for "Application" with the value "Global".

2. Navigate to **Lab Management > Report Lab Progress**.
3. Enter any comments regarding this lab.



The screenshot shows a section titled "Comments and questions:" with a large text area for entering comments.

4. In the main window, click the **I am done!** button.



The screenshot shows a button labeled "I am done!" with the instruction "Let instructor know how you are doing on the lab(s) by selecting the appropriate button." above it.

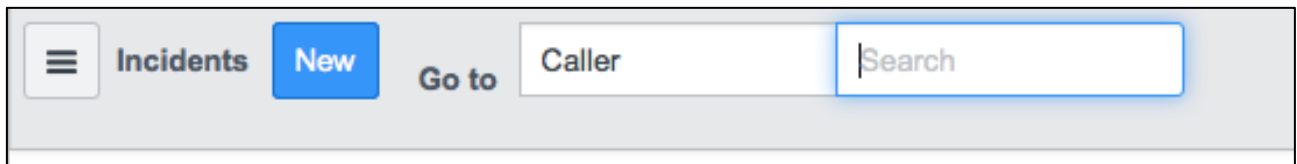
Lab Goal

Using a **Go to** search field without wildcards causes the system to perform the search for values greater than or equal to the value entered. This lab explains how search works and how to modify **Properties** to default to a more specific wildcard search.

Lab 4 Modify Text Search

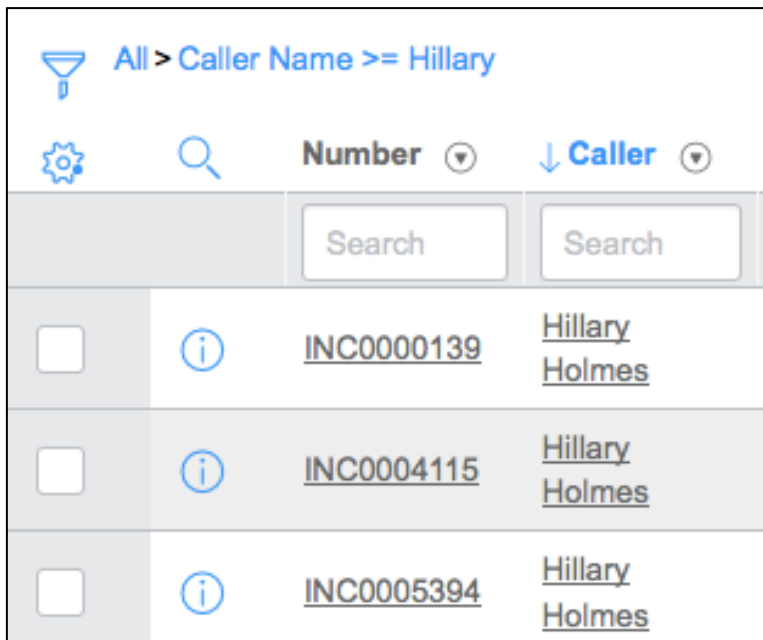
Observe How Go to Searches Work

1. Navigate to **Incident > All**.
2. In the **Go to** drop-down list, select **Caller**.



The screenshot shows the top navigation bar of the ServiceNow interface. It includes a hamburger menu icon, the text 'Incidents', a blue 'New' button, and a 'Go to' dropdown menu currently set to 'Caller'. To the right of the dropdown is a search input field with the placeholder text 'Search'.









3. In the **Caller Name** field, type **Hillary** and press **Enter**.



The screenshot shows the search results for the query 'All > Caller Name >= Hillary'. The results are displayed in a table with three columns: a checkbox, an information icon, and the incident details. The table contains three rows of results, all for incidents with the caller name 'Hillary Holmes'.

		Number	Caller
<input type="checkbox"/>	i	INC0000139	Hillary Holmes
<input type="checkbox"/>	i	INC0004115	Hillary Holmes
<input type="checkbox"/>	i	INC0005394	Hillary Holmes


- Observe how the page now displays records in which the Caller Name is Hillary. Subsequent records appear alphabetically.
- In the **Go to Caller** field, type ***Hillary** and press **Enter**.

 All > Caller Name contains Hllary			
		Number 	↓ Caller 
<input type="checkbox"/>		<u>INC0001513</u>	<u>Hillary Holmes</u>
<input type="checkbox"/>		<u>INC0008229</u>	<u>Hillary Holmes</u>
<input type="checkbox"/>		<u>INC0005394</u>	<u>Hillary Holmes</u>

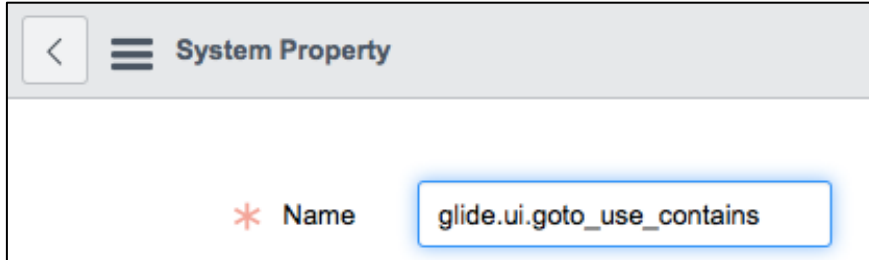
- Observe the new breadcrumbs stating this search is for records that contain the Caller Name Hillary.

Edit System Properties

- In the **Filter** field, type **sys_properties.list**, but **do not** press **Enter**.
- Click the **New** button.

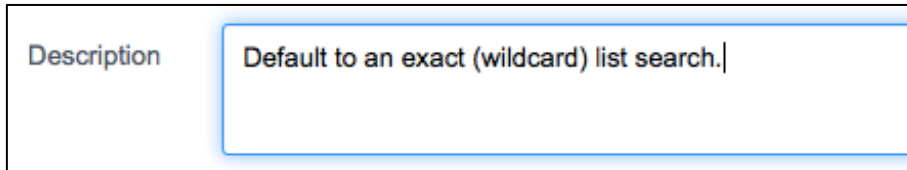

System Properties
 New
Go to

3. In the **Name** field, type `glide.ui.goto_use_contains`.



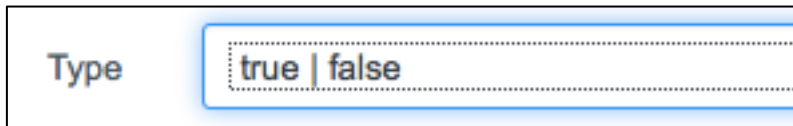
A screenshot of a 'System Property' configuration form. The title bar shows a back arrow, a hamburger menu icon, and the text 'System Property'. Below the title bar, there is a red asterisk icon followed by the label 'Name'. To the right of the label is a text input field containing the text 'glide.ui.goto_use_contains'.

4. In the **Description** field, type **Default to an exact (wildcard) list search.**



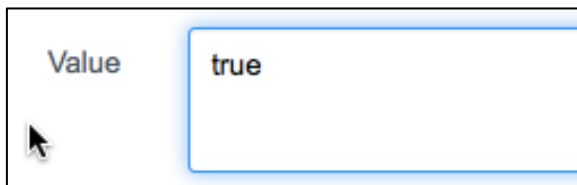
A screenshot of a form field labeled 'Description'. The text 'Default to an exact (wildcard) list search.' is entered into the field.

5. Set the **Type** to **true | false**.



A screenshot of a form field labeled 'Type'. The text 'true | false' is entered into the field.

6. In the **Value** field type **true**.



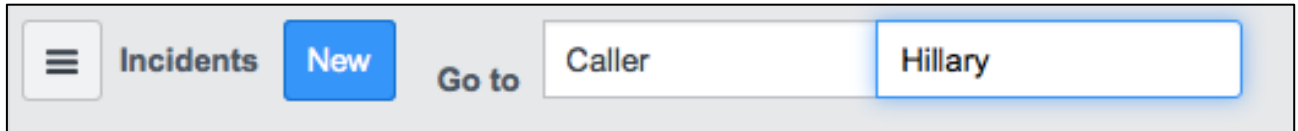
A screenshot of a form field labeled 'Value'. The text 'true' is entered into the field. A mouse cursor is visible at the bottom left of the field.

7. Click **Submit**.

Lab Success Verification

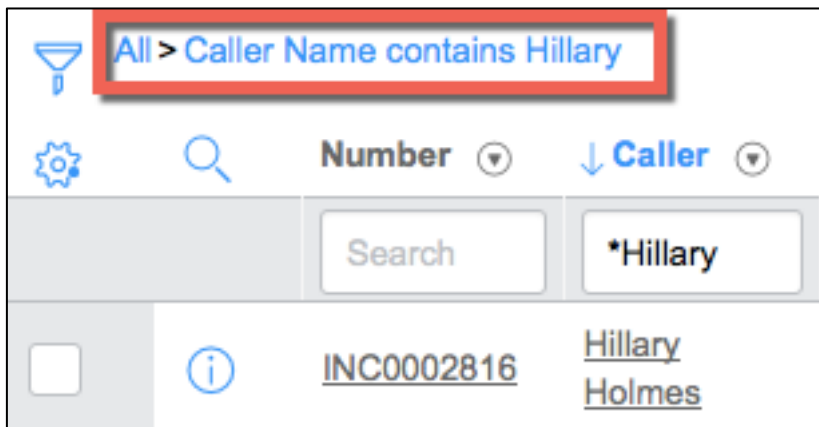
1. Navigate to **Incident > All**.

2. In the **Go to Caller** field, type **Hillary** and press **Enter**.



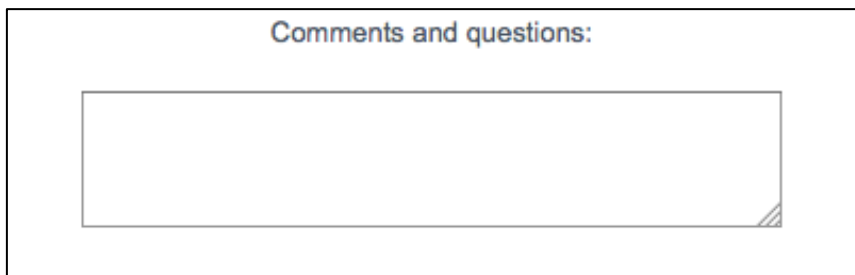
A screenshot of the ServiceNow interface showing the 'Go to Caller' field. The field is labeled 'Go to' and 'Caller'. The text 'Hillary' is entered into the field. There is a 'New' button and an 'Incidents' button to the left of the field.

Your results should look like this:



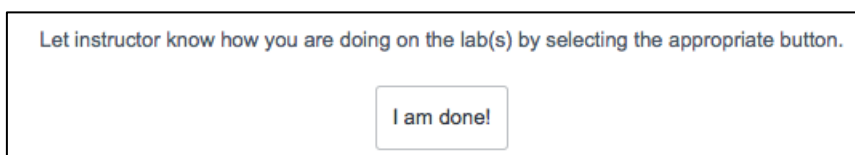
A screenshot of the search results in the ServiceNow interface. The search bar shows 'All > Caller Name contains Hillary'. Below the search bar, there are two search filters: 'Number' and 'Caller'. The 'Number' filter has a search box with 'Search' and a dropdown arrow. The 'Caller' filter has a search box with '*Hillary' and a dropdown arrow. Below the search filters, there is a table with one row. The row contains a checkbox, an information icon, the incident number 'INC0002816', and the caller name 'Hillary Holmes'.

3. Navigate to **Lab Management > Report Lab Progress**.
4. Enter any comments regarding this lab.



A screenshot of the 'Comments and questions' field in the ServiceNow interface. The field is labeled 'Comments and questions:'. Below the label, there is a large text area for entering comments.

5. In the main window, click the **I am done!** button.



A screenshot of the 'I am done!' button in the ServiceNow interface. The button is labeled 'I am done!'. Above the button, there is a text box with the instruction: 'Let instructor know how you are doing on the lab(s) by selecting the appropriate button.'

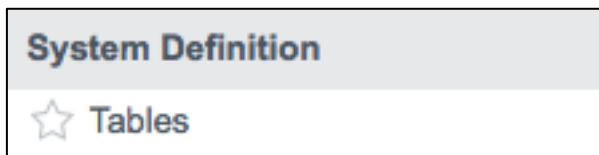
Lab Goal

This lab explains how to assign Incident-resolution tasks to multiple people, allowing them to resolve Incidents more efficiently. The steps explain how to create a new Incident table and how to enter and track these assignments. This lab also explores the new Form Layout Designer.

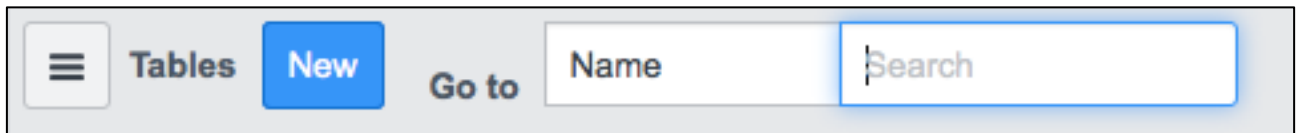
Lab 5 Create and Design a New Table

Create a New Table

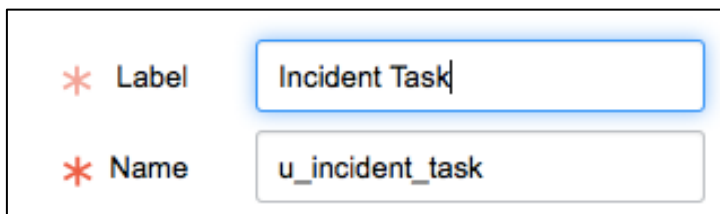
1. Navigate to **System Definition > Tables**.



2. Click the **New** button.

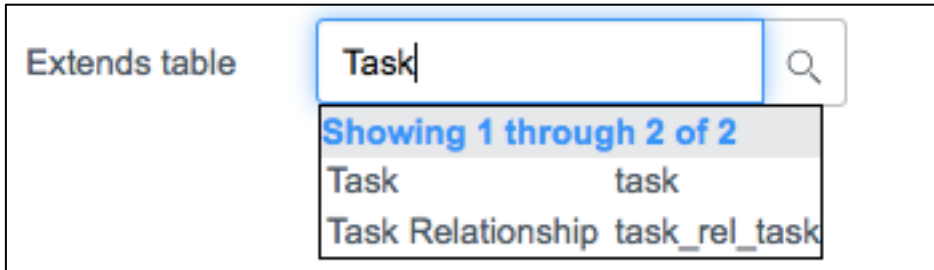


3. In the **Label** field, type **Incident Task**.

A screenshot of the form fields for creating a new table. The 'Label' field is highlighted with a blue border and contains the text 'Incident Task'. The 'Name' field contains the text 'u_incident_task'. Both fields are preceded by a red asterisk icon.

NOTE: The Name field populates automatically with `u_incident_task`. The leading “u” denotes that this is user-defined content. Good practice is to preserve this naming convention.

4. In the **Extends table** field, type **Task**.

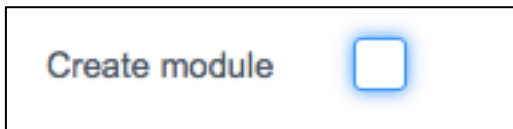


The screenshot shows a form field labeled "Extends table". Inside the field, the text "Task" is entered. To the right of the text is a magnifying glass icon. Below the field, a dropdown menu is open, displaying "Showing 1 through 2 of 2" results. The results are:

Task	task
Task Relationship	task_rel_task

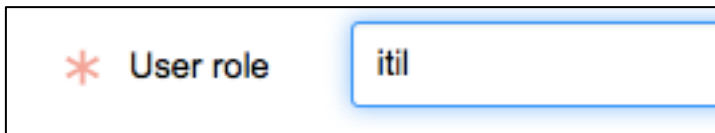
NOTE: This setting allows the new table to inherit the properties of the Task table.

5. Deselect the **Create module** checkbox.



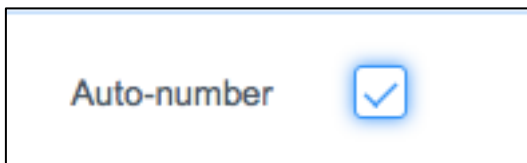
The screenshot shows a form field labeled "Create module" with an unchecked checkbox next to it.

6. In the **Controls** Tab, change the **User role** to **itil**.



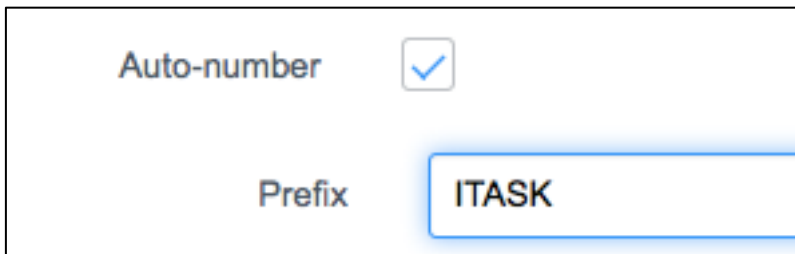
The screenshot shows a form field labeled "User role" with a red asterisk icon to its left. The field contains the text "itil".

7. In the **Controls** Tab, locate the **Auto-number** checkbox and place a checkmark.



The screenshot shows a form field labeled "Auto-number" with a checked checkbox next to it.

8. Change the **Prefix** to **ITASK**.



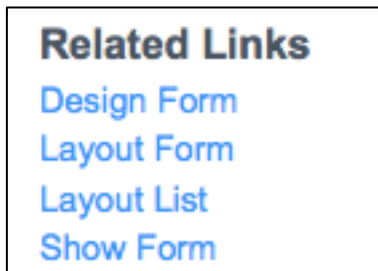
The screenshot shows a form field labeled "Prefix" with the text "ITASK" entered. Above the field, the text "Auto-number" is visible next to a checked checkbox.

9. Click **Save**.

NOTE: This task assumes that you have completed the Create a Save Button lab. If you have not, right-click next to **Table** in the top bar and click **Save**.

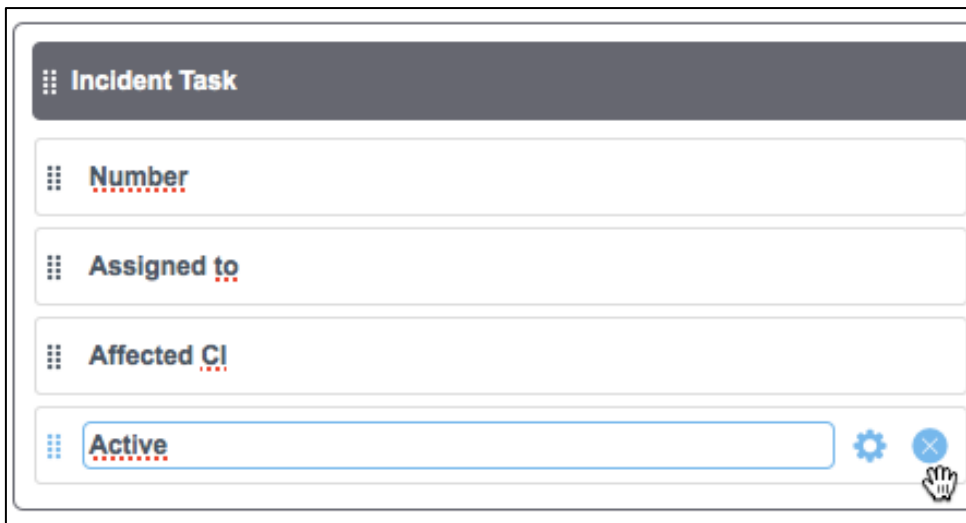
Design the New Form

1. Scroll down to **Related Links** and click **Design Form**.



NOTE: You may need to allow popups from your instance for the Design Form to open in a new tab or window, based upon your browser preferences.

2. Click the **Active** field to select it.

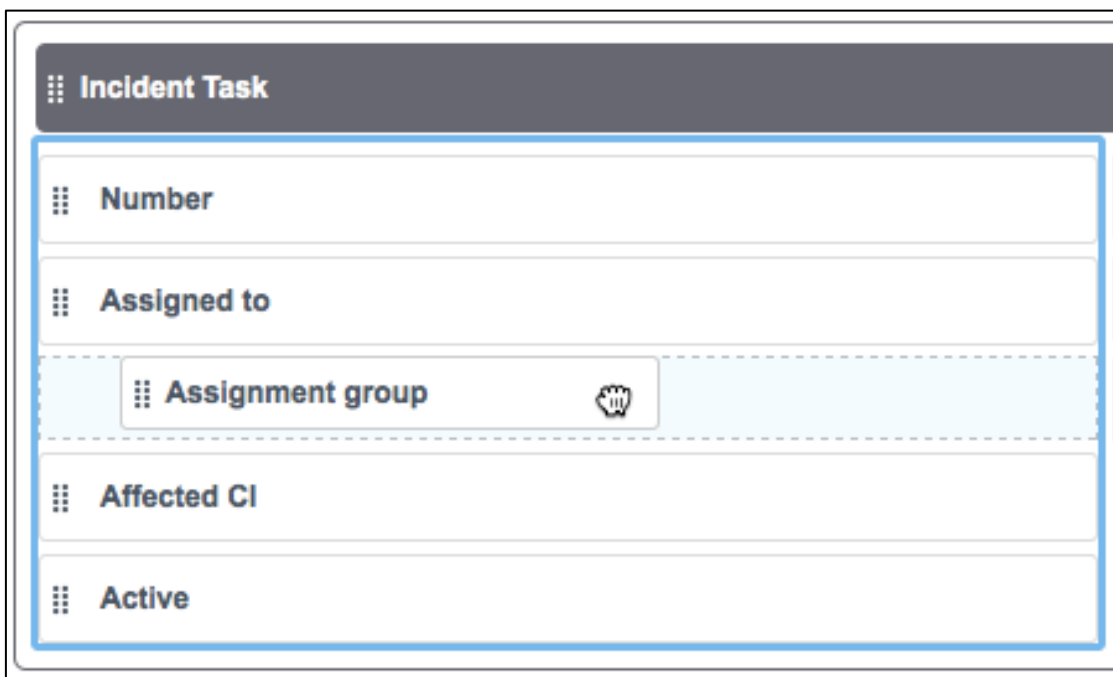


3. Remove the **Active** field by clicking on the **X** on the right of the selected field.

4. In the left pane of your browser, click the **Fields** tab to show existing fields.



5. Drag and drop **Assignment group** from the left pane to just under the **Assigned to** field.



6. Drag and drop **Escalation** from the left pane to just under the **Parent** field.

A screenshot of a form layout. The form is enclosed in a blue border. It contains four fields, each with a three-dot icon to its left. The fields are arranged vertically: **Priority**, **State**, **Parent**, and **Escalation**. The **Escalation** field is positioned directly below the **Parent** field. A dashed horizontal line is visible between the **Parent** and **Escalation** fields. A hand icon is visible next to the **Escalation** field, indicating it is being dragged or dropped.

7. Drag and drop **Created** from the left pane to just above the **Priority** field.

A screenshot of a form layout. The form is enclosed in a blue border. It contains five fields, each with a three-dot icon to its left. The fields are arranged vertically: **Created**, **Priority**, **State**, **Parent**, and **Escalation**. The **Created** field is positioned at the top, directly above the **Priority** field. A dashed horizontal line is visible between the **Created** and **Priority** fields. A hand icon is visible next to the **Created** field, indicating it is being dragged or dropped.

8. In the left pane, click the **Field Types** tab.



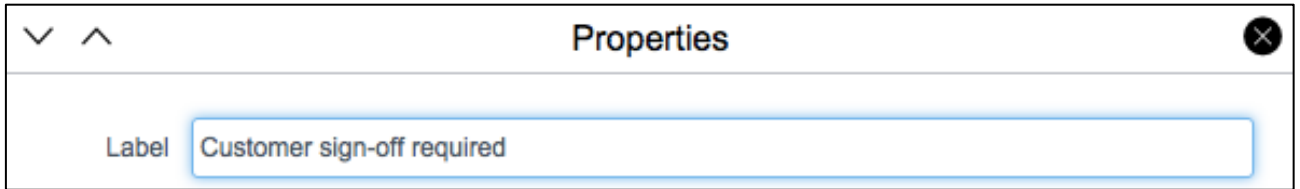
9. Drag and drop a **True/False** field from the left pane to just below the **Affected CI** field.



10. Click the **Field Properties** icon.



11. In the **Label** field, overwrite New True/False with **Customer sign-off required**.

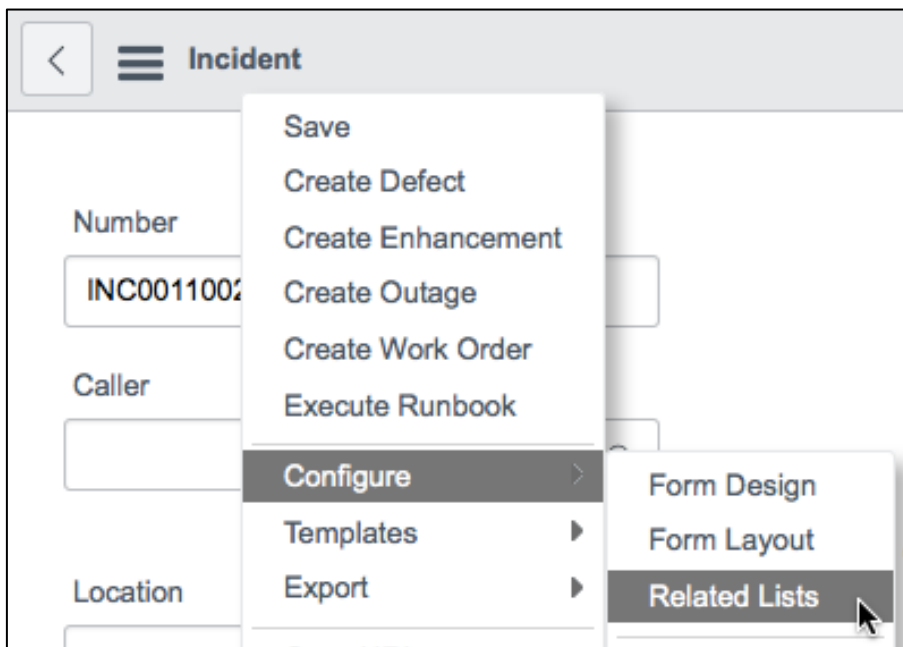


The screenshot shows a 'Properties' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a 'Label' field with a text input box containing the text 'Customer sign-off required'.

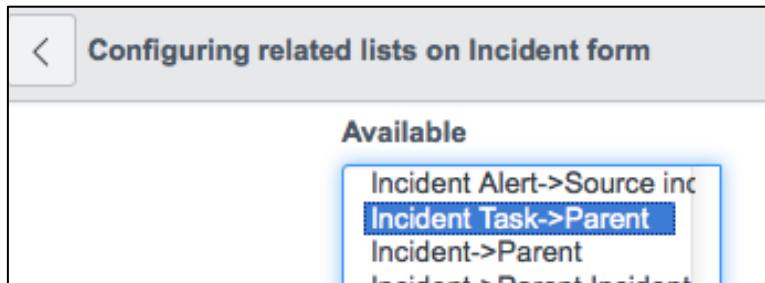
12. Click **Save**.
13. Close the **Form Design** tab or window and return to your previous tab or browser window.

Add the New Form as a Related List

1. Navigate to **Incident > Create New**.
2. Right-click on the top bar and select **Configure > Related Lists**.



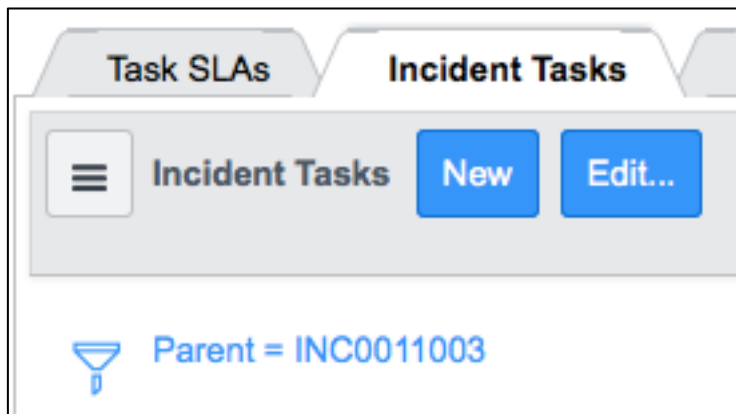
3. In the left column, double-click **Incident Task->Parent** to add it to the right column.



4. Click **Save**.

Lab Success Verification

1. On the **Create New Incident** form, click **Save**.
2. At the bottom of the form, click the **Incident Tasks** tab.



- Next to Incident Tasks, click the **New** button.

Your form should look like this:

The screenshot shows the 'Incident Task' form in ServiceNow. The form is divided into two main sections. The left section contains fields for 'Number' (ITASK0001001), 'Assigned to' (with a search icon), 'Assignment group' (with a search icon), 'Affected CI' (with a search icon), 'Customer sign-off required' (checkbox), 'Active' (checkbox, checked), 'Short description' (text area), 'Description' (text area), and 'Work notes' (text area). The right section contains fields for 'Created' (calendar icon), 'Priority' (4 - Low), 'State' (Open), 'Parent' (INC0011003, with a search icon and info icon), and 'Escalation' (Normal). A 'Submit' button is located at the bottom left of the form.

- In the **Affected CI** field, add **SAP ORA01**.

This close-up shows the 'Affected CI' field. The text 'SAP ORA01' is entered into the input box. To the right of the input box are three icons: a magnifying glass (search), a group of people (assignment group), and an information icon (i).

- Click **Submit**.

NOTE: This Incident Task will be used in a later lab.

- Navigate to **Lab Management > Report Lab Progress**.

7. Enter any comments regarding this lab.

Comments and questions:

8. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

Lab Goal

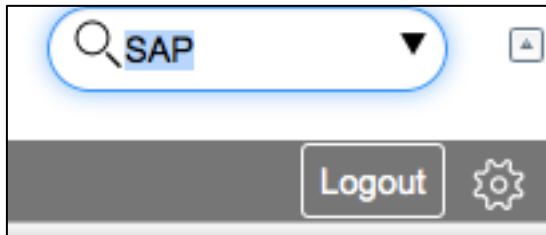
The Zing search engine can search any indexed text field and optionally indexed text fields in supported attachment types. This lab explains how to add a new table to broaden global searches.

Lab 6 Configure Global Search

Observe How Global Search Works

NOTE: This lab assumes you created the Incident Task table in a previous lab.

1. In the **Global Search** field in the top right of the browser, type **SAP** and press **Enter**.



2. Observe which tables are included by default with your instance.

<input checked="" type="checkbox"/> Select All <input checked="" type="checkbox"/> Tasks <input checked="" type="checkbox"/> Live Feed <input checked="" type="checkbox"/> Policy <input checked="" type="checkbox"/> People & Places <input checked="" type="checkbox"/> Knowledge & Catalog									
SAP <input type="text"/> <input type="button" value="Q"/>									Edit Search Groups
Incidents (2500) , Changes (2) Live Feed Messages (1) Catalog Items (1)									
Search tips and preferences									
<input type="checkbox"/> Tasks (2502 matches) <i>No matches for Change Tasks, Problems, Requests, Catalog Tasks, Tickets</i>									
<input type="checkbox"/> Incidents - 2500									
	Number	Priority	State	Caller	Short description	Affected CI	Category	Assignment	
<input type="button" value="i"/>	INC0006411	1 - Critical	New	Joe Employee	User can't access SAP Controlling application	SAP Controlling	Software	Software	

Edit Search Groups

1. Click the **Edit Search Groups** link.

The screenshot shows the ServiceNow Search interface. At the top, there are checkboxes for 'Select All', 'Tasks', 'Live Feed', 'Policy', 'People & Places', and 'Knowledge & Catalog'. Below these is a search bar with 'SAP' entered. To the right of the search bar, the 'Edit Search Groups' link is highlighted with a red rectangle. Below the search bar, there are links for 'Incidents (2500)', 'Changes (2)', 'Live Feed Messages (1)', and 'Catalog Items (1)'. The main section is titled 'Tasks (2502 matches)' and includes a sub-section for 'Incidents - 2500'. A table of search results is displayed with columns: Number, Priority, State, Caller, Short description, Affected CI, Category, and Assignment. The first row shows an incident with number 'INC0006411', priority '1 - Critical', state 'New', caller 'Joe Employee', and a short description 'User can't access SAP Controlling application'.

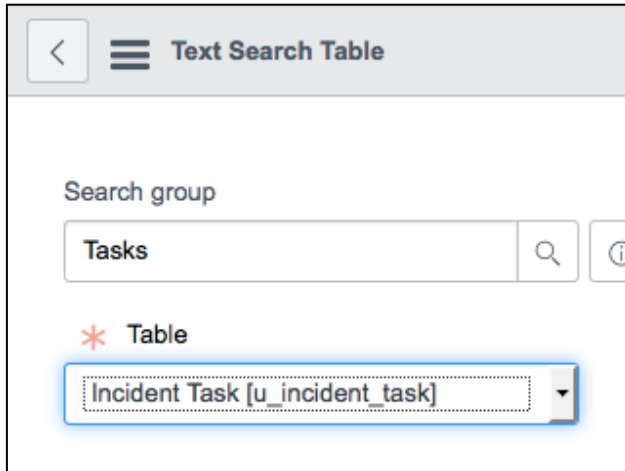
2. Click the **Tasks** link.

The screenshot shows the ServiceNow Search interface with the 'Tasks' link highlighted in a red rectangle. The interface includes a filter icon, a search icon, and a 'Name' dropdown menu. Below these, there is a table with columns: Name, Description, and Tables searched. The 'Tasks' link is highlighted in the 'Name' column, and its description is 'Search task records (Incidents, Change R...'. The 'Tables searched' column shows 'Change Requests, Change Tasks, Incidents...'.

3. Next to **Text Search Tables**, click the **New** button.

The screenshot shows the ServiceNow Search interface with the 'New' button highlighted in a blue rectangle. The interface includes a 'Text Search Tables' section with a 'New' button, a 'Go to' button, and a search bar. The 'New' button is highlighted in blue, and the 'Go to' button is labeled 'Order'.

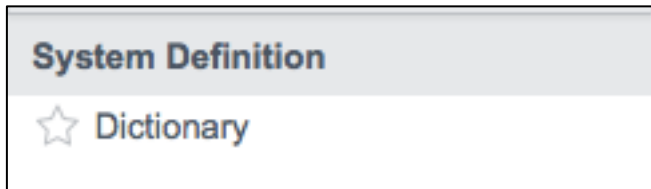
4. From the **Table** drop-down list, select **Incident Task [u_incident_task]** and click **Submit**.



The screenshot shows a web interface titled "Text Search Table". It has a "Search group" dropdown menu with "Tasks" selected. Below it, there is a "Table" dropdown menu with "Incident Task [u_incident_task]" selected. The interface also includes a search icon and an information icon.

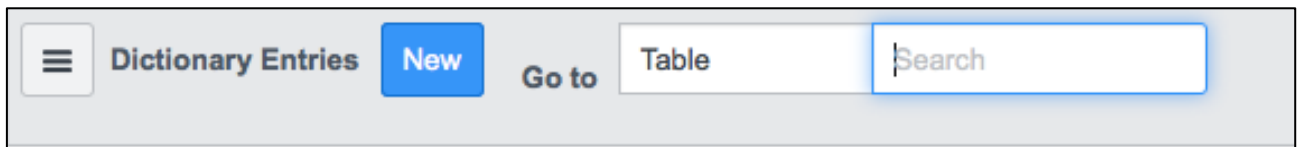
Index the Incident Task Table

1. Navigate to **System Definition > Dictionary**.



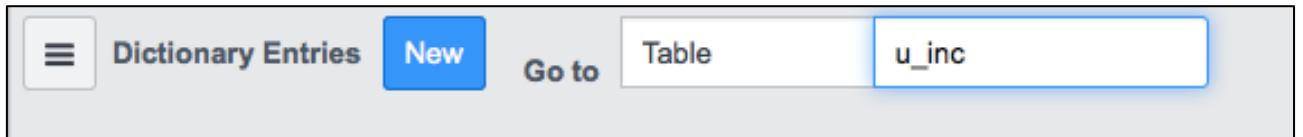
The screenshot shows a web interface titled "System Definition". Below the title, there is a "Dictionary" option with a star icon, indicating it is the selected or active section.

2. In the **Go to** drop-down list, select **Table**.



The screenshot shows a web interface titled "Dictionary Entries". It has a "Go to" dropdown menu with "Table" selected. There is also a "Search" input field.

3. In the **Go to Table** search field, type **u_inc** and press **Enter**.



The screenshot shows the same "Dictionary Entries" interface as before, but now the "Search" input field contains the text "u_inc".

- Click the first entry for **u_incident_task**.

All > Table >= u_inc

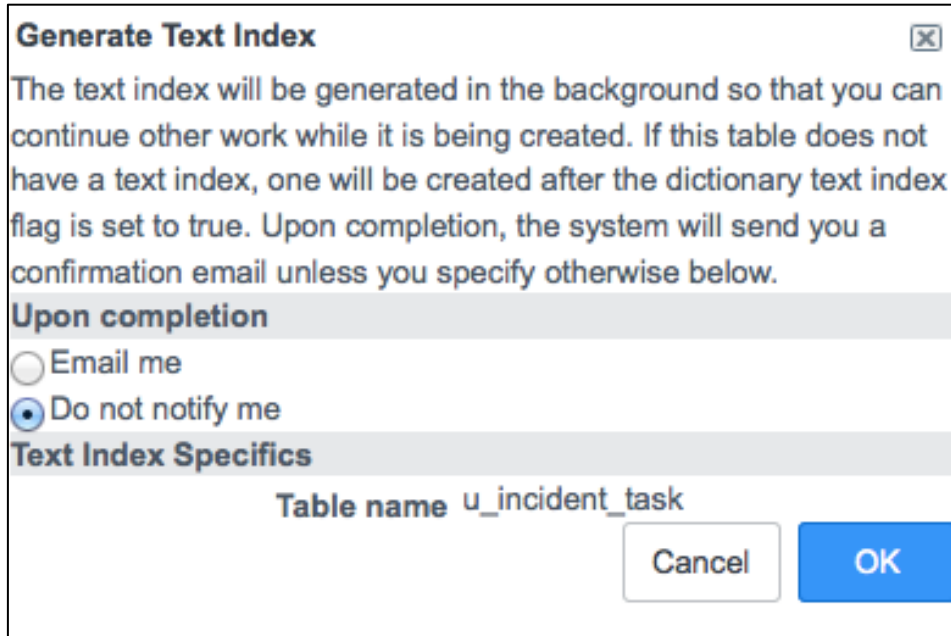
		Table	Column name	Type
		Search	Search	Search
<input type="checkbox"/>		u_incident_task		Collection
<input type="checkbox"/>		u_incident_task	sys_id	Sys ID (GUID)
<input type="checkbox"/>		u_incident_task	u_boolean_1	True/False

- Under **Related Links**, click **Generate Text Index**.

Related Links

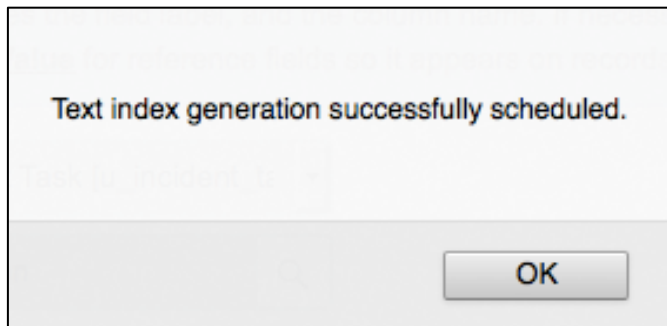
[Generate Text Index](#)
[Show Table](#)
[Advanced view](#)

6. In the **Generate Text Index** pop-up window, click the **Do not notify me** option button.



The screenshot shows a window titled "Generate Text Index" with a close button in the top right corner. The main text explains that the text index will be generated in the background and that a confirmation email will be sent unless specified otherwise. Below this, there is a section titled "Upon completion" with two radio button options: "Email me" and "Do not notify me". The "Do not notify me" option is selected. Below the radio buttons is a section titled "Text Index Specifics" with a label "Table name" followed by the text "u_incident_task". At the bottom right of the window are two buttons: "Cancel" and "OK".

7. Click **OK**.
8. In the confirmation pop-up window, click **OK**.



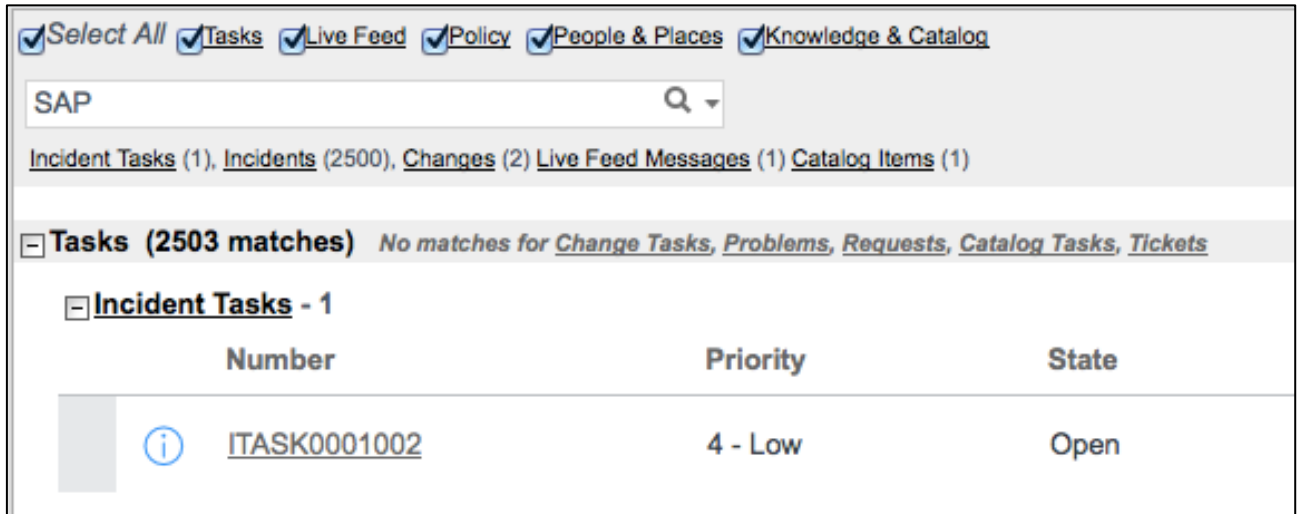
The screenshot shows a confirmation pop-up window with a light gray background. It contains the text "Text index generation successfully scheduled." in a bold font. Below this text, there is a faint, semi-transparent message: "Task [u_incident_task] is scheduled for [11/11/2015 11:11:11 AM]". At the bottom right of the window is an "OK" button.

NOTE: Normally, tables are indexed automatically once per day, via a scheduled job. The steps above are to force a refresh immediately. Performing this step against a large table on a production instance may affect the user experience.


Lab Success Verification

1. In the **Global Search** field, type **SAP** and press **Enter**.

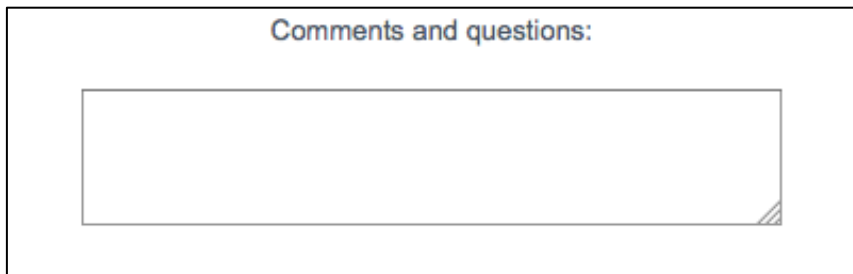
Your search results should now include the new table, **Incident Tasks**.



The screenshot shows the ServiceNow search results for the query "SAP". At the top, there are filter buttons: ☒ Select All, ☒ Tasks, ☒ Live Feed, ☒ Policy, ☒ People & Places, and ☒ Knowledge & Catalog. Below these is a search bar containing "SAP" and a magnifying glass icon. The results summary shows: Incident Tasks (1), Incidents (2500), Changes (2), Live Feed Messages (1), and Catalog Items (1). A section titled **Tasks (2503 matches)** is expanded, showing a sub-section **Incident Tasks - 1**. Below this is a table with the following data:

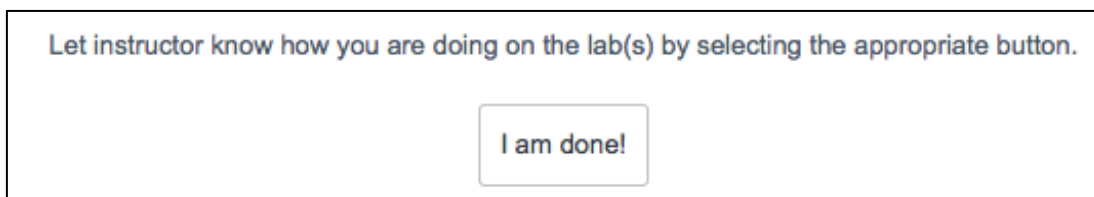
	Number	Priority	State
	<u>ITASK0001002</u>	4 - Low	Open

2. Navigate to **Lab Management > Report Lab Progress**.
3. Enter any comments regarding this lab.



The screenshot shows a text area for entering comments. The label "Comments and questions:" is at the top. Below it is a large, empty rectangular text input field.

4. In the main window, click the **I am done!** button.



The screenshot shows a button labeled "I am done!". Above the button is the text: "Let instructor know how you are doing on the lab(s) by selecting the appropriate button."

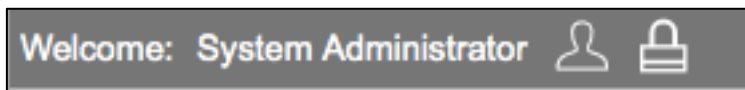
Lab Goal

Users often belong to more than one group. Admins often create reports for multiple users. This lab explains how to use Dynamic Filters in the list view and in a report. These tools make the reporting tasks easy by adjusting the content, based on the context of the current user.

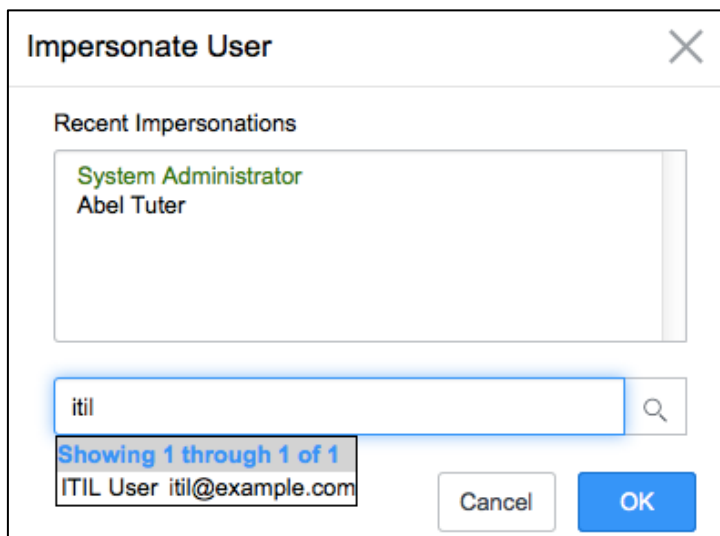
Lab 7 Using Dynamic Filters

Impersonate ITIL User

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.



2. Type **ITIL** and select the **ITIL User**.



3. Click **OK**.

Create a Filtered List

1. Navigate to **Incident > All**.



2. At the top of the List, click to expand the filter menu.

3. In the **-- choose field --** (first) drop-down list, select **Assignment Group**.

4. In the **--oper--** (second) drop-down list, select **is (dynamic)**.

5. Click the **Run** button.

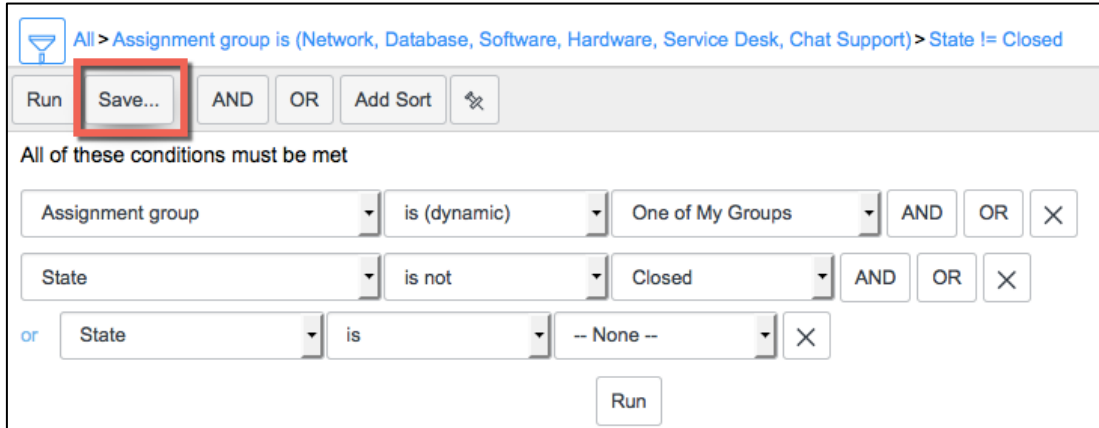
6. In the **State** column, right-click on a **Closed** state and select **Filter Out**.


					Asset	
<input type="checkbox"/>		INC0009610	4 - Low	Closed	docking station won't	ase laptop
<input type="checkbox"/>		INC0009640	3 - Moderate	Closed	allels issues on mac	
<input type="checkbox"/>		INC0009592	3 - Moderate	Closed	rosoft Visual C++	ime Error


Show Matching
Filter Out
 Copy URL to Clipboard
 Assign Tag



7. Next to the **All** breadcrumb, click  to expand the filter menu.



 All > Assignment group is (Network, Database, Software, Hardware, Service Desk, Chat Support) > State != Closed

Run Save... AND OR Add Sort 

All of these conditions must be met

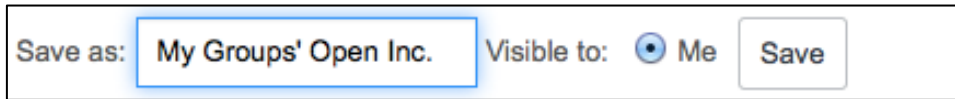
Assignment group is (dynamic) One of My Groups AND OR X


State is not Closed AND OR X

or State is -- None -- X

Run

8. Click **Save**.
9. In the **Save as** field, type **My Groups' Open Inc.**



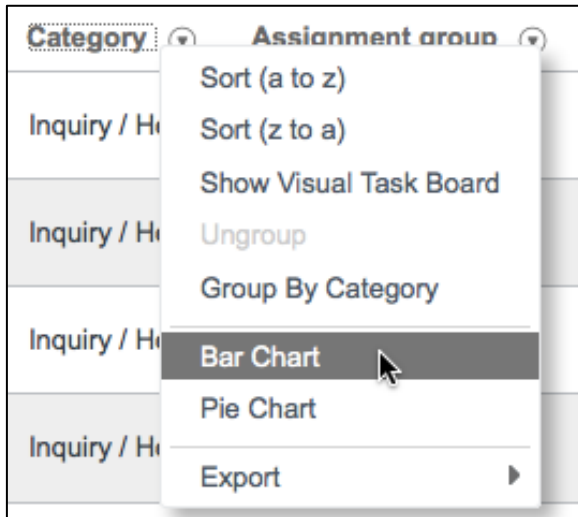
Save as: My Groups' Open Inc. Visible to:  Me Save

10. Next to **Visible to**, click **Save**.

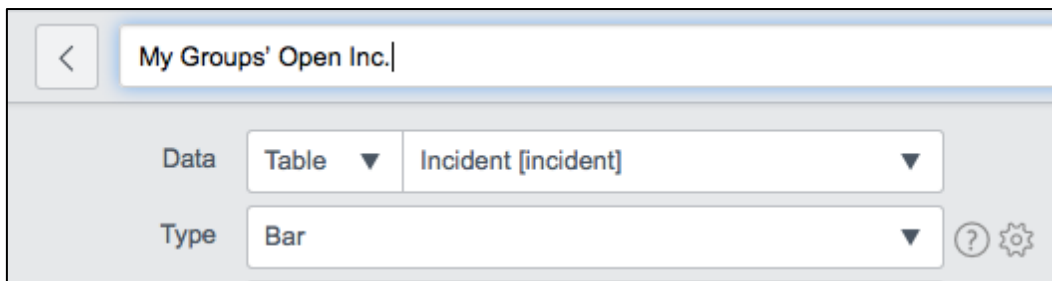
NOTE: To access your saved filter from a list view, click on the list name, for example, **Incidents > Filters > Saved filter name**.

Create a Filtered Report

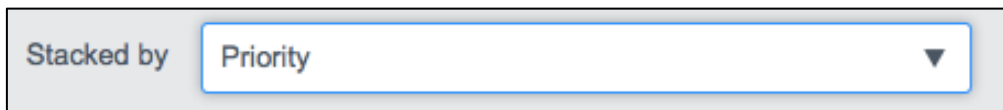
1. Right-click on **Category** and select **Bar Chart**.




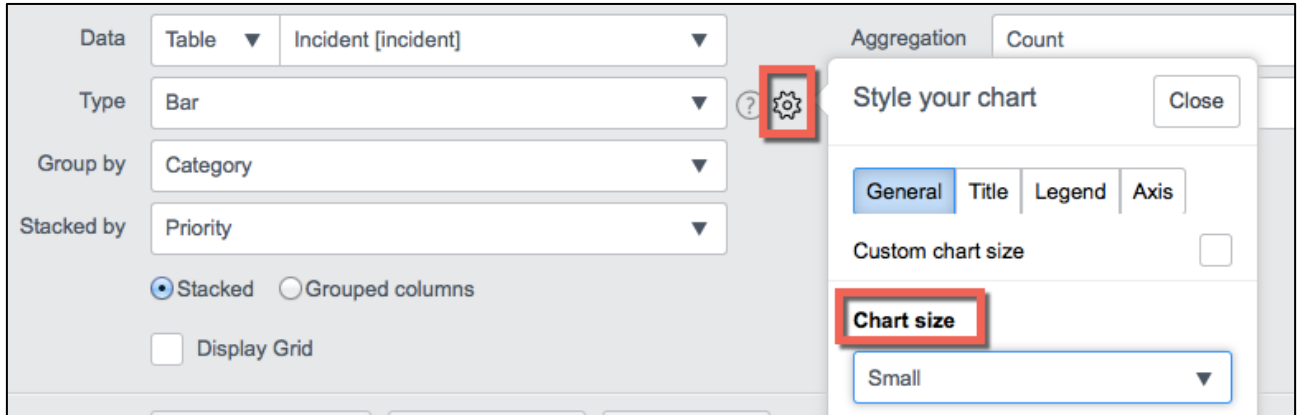
2. In the **Enter the report title here...** field, type **My Groups' Open Inc.**

A screenshot of the report configuration interface. At the top is a text field for the report title, which contains 'My Groups' Open Inc.'. Below this are two rows of configuration options. The first row has 'Data' with a 'Table' dropdown and 'Incident [incident]' dropdown. The second row has 'Type' with a 'Bar' dropdown. To the right of the 'Type' dropdown are a question mark icon and a gear icon.

3. Set the **Stacked Field** drop-down list to **Priority**.

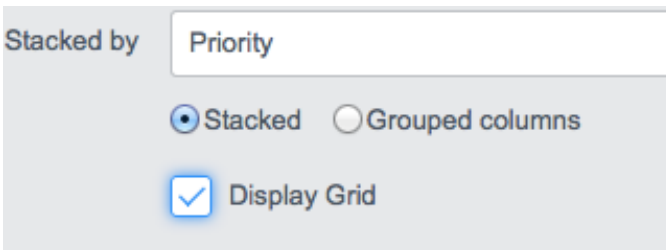
A screenshot of the 'Stacked by' dropdown menu. The dropdown is open, showing 'Priority' as the selected option.

4. Select  at the end of the **Type** field and set the **Chart Size** drop-down list to **Small** then select **Close**.



The screenshot shows a report configuration window. On the left, the 'Type' dropdown is set to 'Bar'. A red box highlights a gear icon next to it. On the right, a 'Style your chart' dialog is open. The 'General' tab is selected. Under 'Custom chart size', the 'Chart size' dropdown is set to 'Small'. A red box highlights the 'Chart size' dropdown.

5. In the **Display grid** checkbox, place a **checkmark**.



The screenshot shows the 'Stacked by' section. The 'Priority' dropdown is selected. Below it, the 'Stacked' radio button is selected. The 'Display Grid' checkbox is checked with a blue checkmark.

6. Click **Save**.

NOTE: To access your saved report, navigate to **Reports > View / Run**.

Lab Success Verification

Your saved report should look similar to this:

Report Saved: My Groups' Open Inc.

< My Groups' Open Inc. Save Run

Data: Table Incident [incident] Aggregation: Count

Type: Bar No. groups: System Default (12)

Group by: Category ☒ Show Other

Stacked by: Priority

☒ Stacked ☐ Grouped columns

☒ Display Grid

Add Filter Condition Add "OR" Clause Add Sort Field Minimize

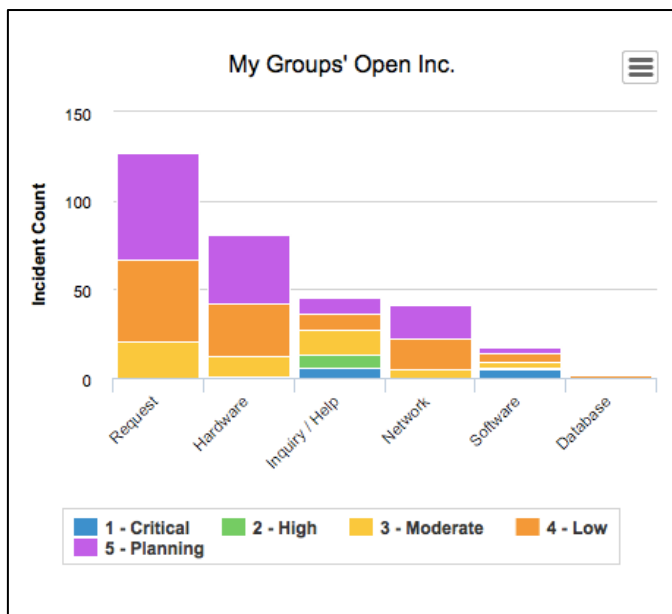
All of these conditions must be met

Assignment group is (dynamic) One of My Groups AND OR X

State is not Closed AND OR X

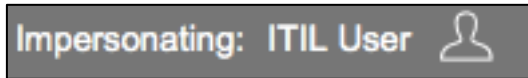
or State is -- None -- X

The Display grid should look like this:

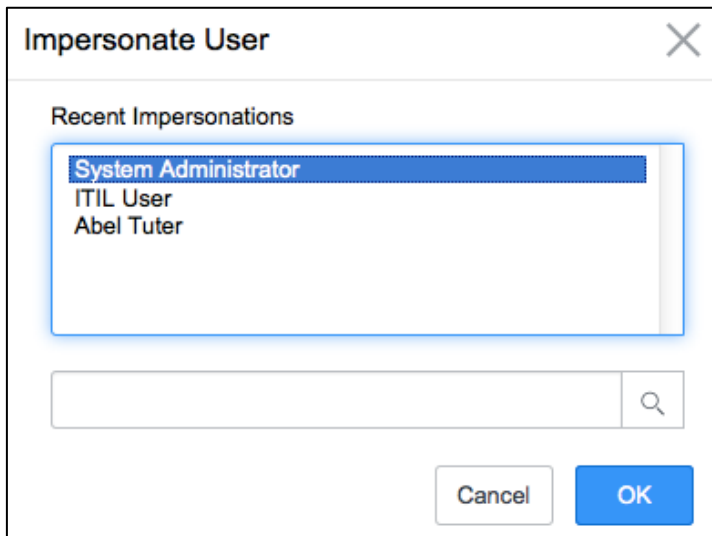


Return to System Administrator

1. Click the **Person** icon next to **Impersonating: ITIL User** to bring up the **Impersonate User** window.



2. Double-click on **System Administrator** to return to this user.



3. Navigate to **Lab Management > Report Lab Progress**.
4. Enter any comments regarding this lab.

Comments and questions:

5. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

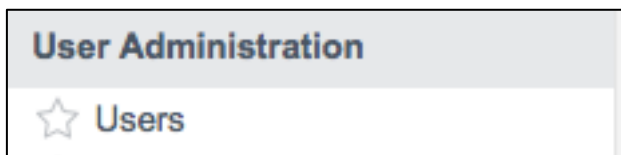
Lab Goal

Email notifications can be used to send alerts for a variety of use cases. This lab explains how to create an email notification to alert you if a user_id ending in @snc has logged into your instance.

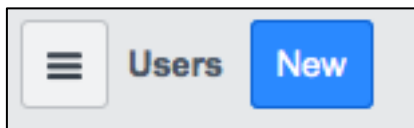
Lab 8 Email Notification

Create New Users

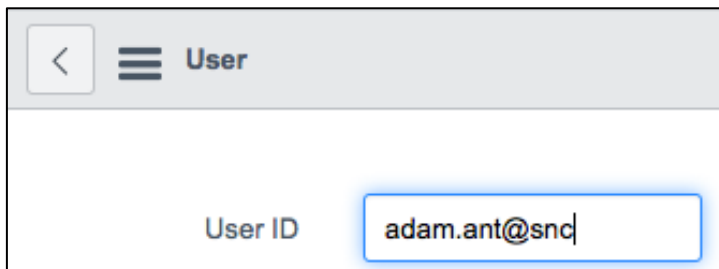
1. Navigate to **User Administration > Users**.



2. Click the **New** button.



3. In the **User ID** field, type **adam.ant@snc**.






4. In the **First Name** field, type **Adam**.

First name	<input type="text" value="Adam"/>
------------	-----------------------------------

5. In the **Last Name** field, type **Ant**.

Last name	<input type="text" value="Ant"/>
-----------	----------------------------------

6. Click **Save**.

 **User - Adam Ant** 

Primary email device created for Adam Ant

User ID	<input type="text" value="adam.ant@snc"/>
First name	<input type="text" value="Adam"/>
Last name	<input type="text" value="Ant"/>

7. In the **User ID** field, change **adam.ant@snc** to **add.me**.

User ID	<input type="text" value="add.me"/>
---------	-------------------------------------


8. In the **First Name** field, change Adam to **Add**.

First name	<input type="text" value="Add"/>
------------	----------------------------------

9. In the **Last Name** field, change Ant to **Me**.

Last name


10. In the **Email** field, enter your email address.

Email 

11. Click the **Insert** button.

≡ Users **New** Search for text

Primary email device created for Add Me

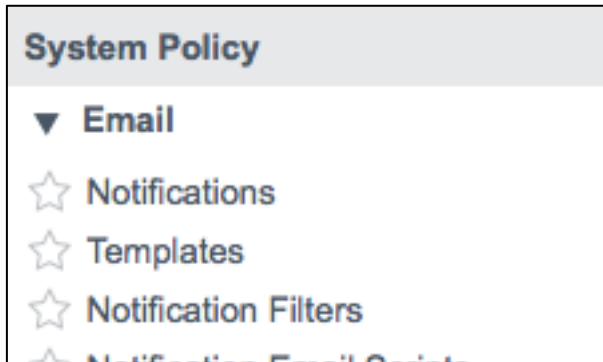
 All

NOTE: Email does not process on lab instances; you will not receive an email during this lab. We will verify the lab separately.

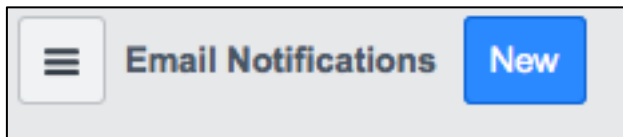
NOTE: The **Insert** button works similar to the **Save as** button in other applications, preserving the original record and creating a new one.

Create a New Email Notification

1. Navigate to **System Policy > Email > Notifications**.



2. Click the **New** button.



3. In the **Name** field, type **Hello, @snc logged into your instance**.

Name	<input type="text" value="Hello, @snc logged into your instance"/>
------	--

4. In the **Table** drop-down list, select **Transaction Log Entry [syslog_transaction]**.

Name	<input type="text" value="Hello, @snc logged into your instance"/>
------	--

5. In the **Updated** checkbox, place a checkmark, then click **Save**.

Updated	<input checked="" type="checkbox"/>
---------	-------------------------------------

6. In the **When to send** tab-- **choose field** -- (first) drop-down list, select **Created by**.

When to send | Who will receive | What it will contain

Notifications can be sent when a record is **Inserted** or **Updated** (or both) into the **Table** specified above, only if the specified **Conditions** are met.

Inserted ☐ Updated ☒

Conditions

Created by starts with

7. In the **second** drop-down list, select **contains**.

Created by **contains**

8. In the field next to **contains**, type **@snc**.

Created by **contains** **@snc**

9. Click the **Who will receive** tab.

When to send | **Who will receive** | What it will contain

Notifications can be sent to specific **Users** and **Groups** or to **User/Groups** in fields on the record that generated this notification.

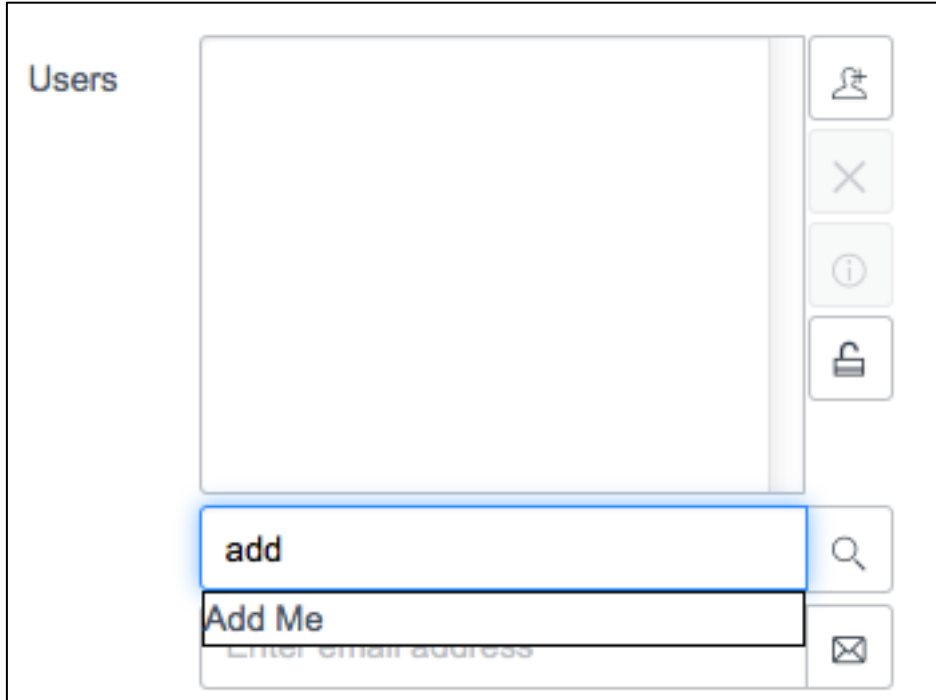
Users ☒ **Groups** ☐

Created by starts with

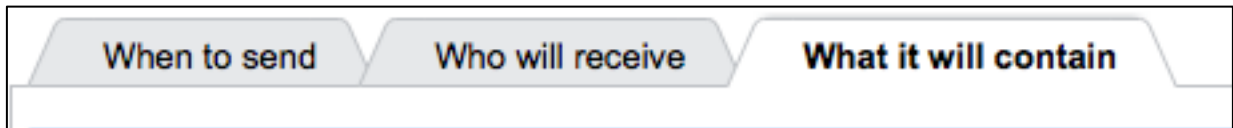
10. Next to **Users**, click the **Lock** icon to open the **Users** interface.

Users ☒

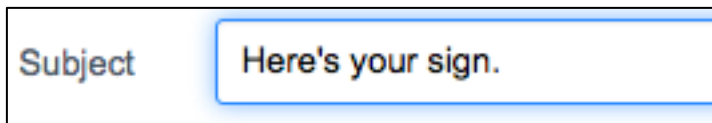
11. In the field beneath **Users** (with the magnifying glass icon), type **add** and press **Enter**.



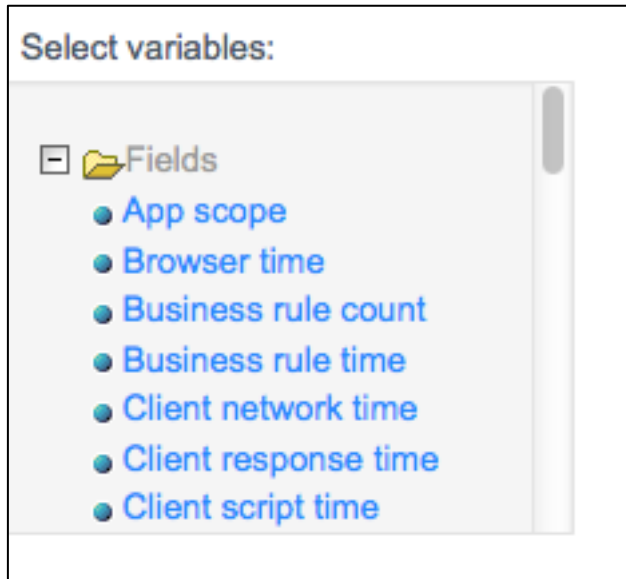
12. Click the **What it will contain** tab.



13. In the **Subject** field, type **Here's your sign.**



14. Beneath **Select Variables** on the right side of the screen, click the + sign next to **Fields** to expand the list of fields to include in the Message HTML.



15. Select the following Fields from the list (above) by clicking on them:

Created

Created by

IP Address

Table

URL

The result appears in the **Message HTML**.

Message HTML

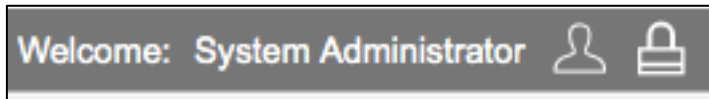
B	<i>I</i>	<u>U</u>	↶	↷	Fonts	▼	Size	▼
≡	≡	≡	:≡	▼	≡	▼	↔	

URL: \${url}
Table: \${table}
IP Address: \${remote_ip}
Created by: \${sys_created_by}
Created: \${sys_created_on}

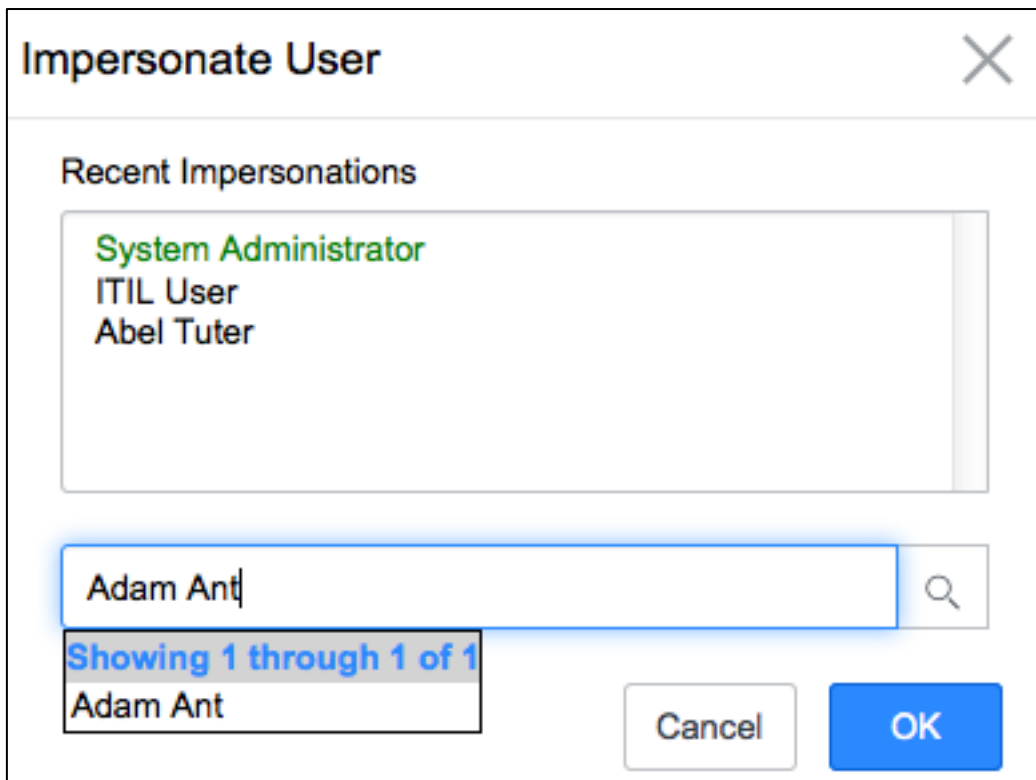
16. Click **Submit**.

Lab Success Verification

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.

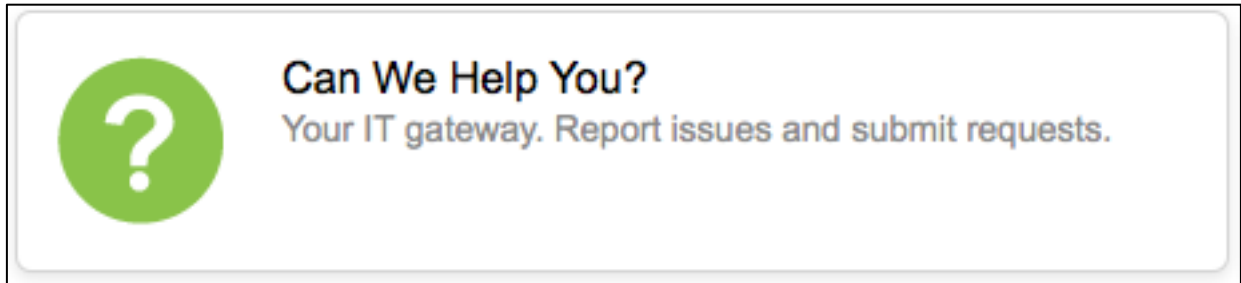


2. Type **Adam Ant** and select the user.

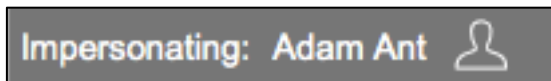


3. Click **OK**.
4. Navigate to **Self-Service > Service Catalog**.

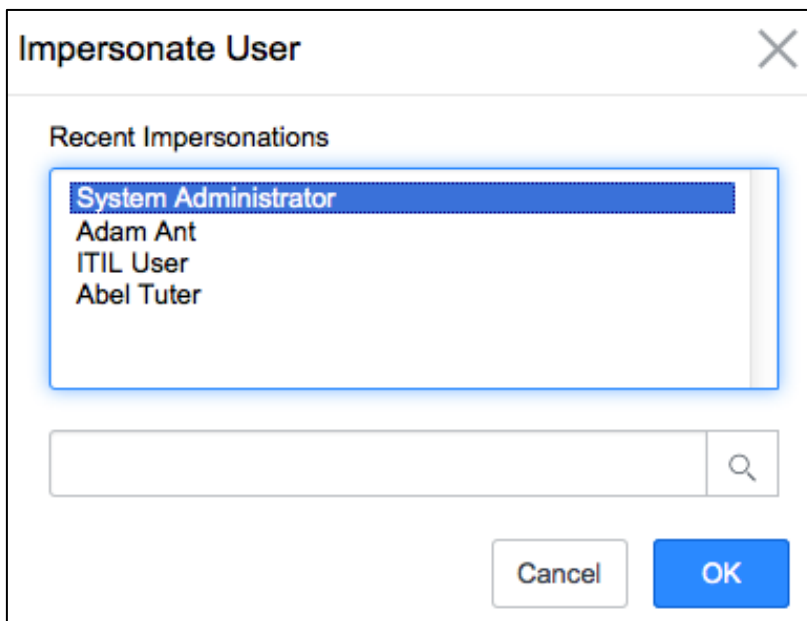
5. In the Service Catalog, click on **Can We Help You?**



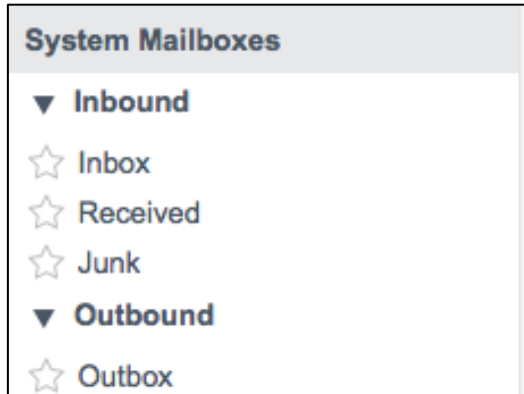
6. Click the **Person** icon next to **Impersonating: Adam Ant** to bring up the Impersonate User window.



7. Double-click **System Administrator** to return to this user.



8. Navigate to **System Mailboxes > Outbound > Outbox**.

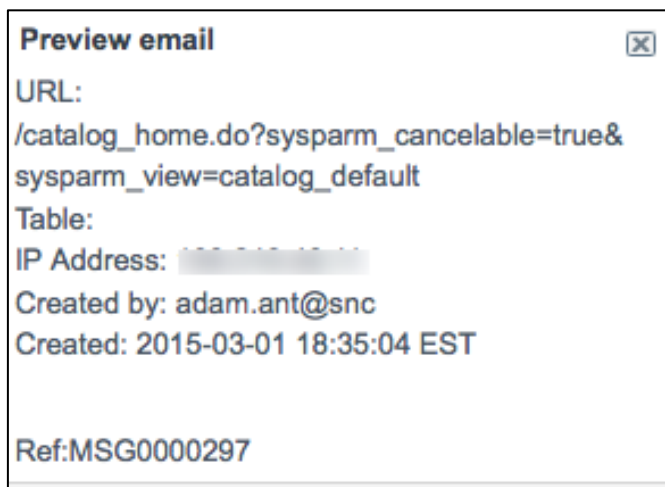


9. Click the **Information**  icon to view the email notification.

10. Under Related Links, click **Preview HTML body**.



The results should look something like this:



NOTE: For more information, visit the following wiki articles:

http://wiki.servicenow.com/index.php?title=Email_Notifications

https://wiki.servicenow.com/index.php?title=Configuring_Email

11. Navigate to **Lab Management > Report Lab Progress**.

12. Enter any **comments** regarding this lab.

Comments and questions:

13. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

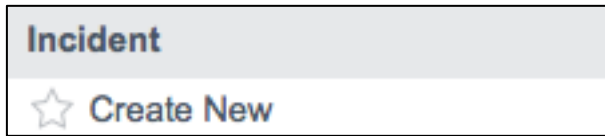
Lab Goal

This lab explains how to create a template to automate fields when creating an incident. The steps show how to use the template as part of a Service Catalog item that allows users to report a printer issue swiftly, without having to fill in extra information.

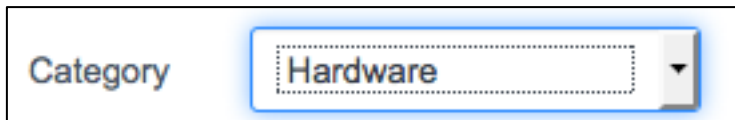
Lab 9 Create a Record Producer

Create a New Subcategory

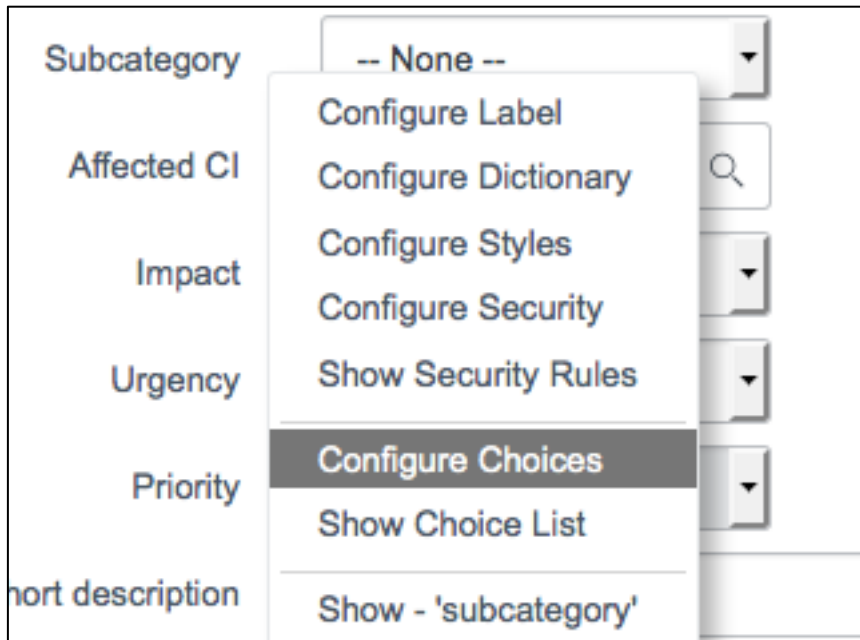
1. Navigate to **Incident > Create New**.



2. In the **Category** drop-down list, select **Hardware**.



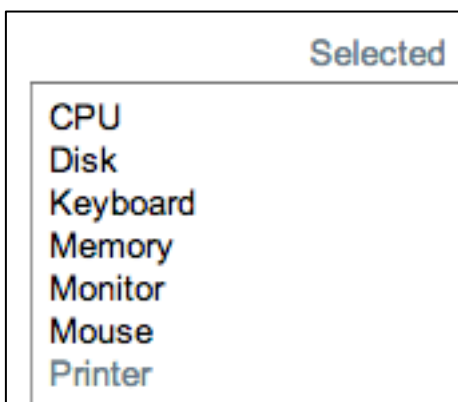
3. Right-click Subcategory and select **Configure Choices**.



4. In the **Enter new item** field, type **Printer** and click **Add**.

A screenshot of a form element. It consists of a text input field with the label 'Enter new item:' and the text 'Printer' entered inside. To the right of the input field is a button labeled 'Add'.

5. View the new item in the **Selected** list.



6. Click **Save**.

Create a New Template

1. In the **Category** drop-down list, select **Hardware**.
2. In the **Subcategory** drop-down list, select **Printer**.



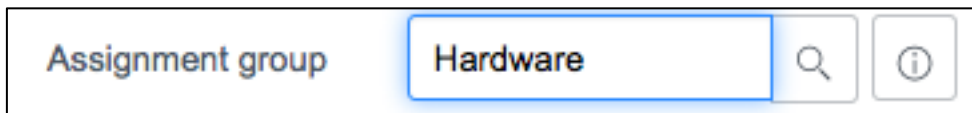
A screenshot of two drop-down menus. The first menu is labeled 'Category' and has 'Hardware' selected. The second menu is labeled 'Subcategory' and has 'Printer' selected. Both menus are highlighted with a blue border.

3. In the **Contact type** drop-down list, select **Self-service**.



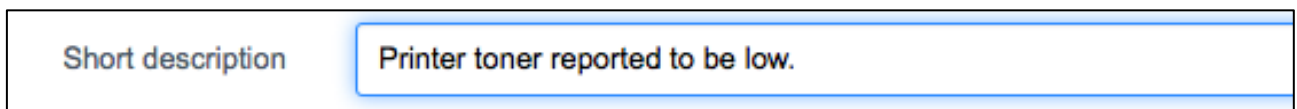
A screenshot of a drop-down menu labeled 'Contact type' with 'Self-service' selected. The menu is highlighted with a blue border.

4. In the **Assignment** group field, type **Hardware**.



A screenshot of a text input field labeled 'Assignment group' containing the text 'Hardware'. To the right of the field are two icons: a magnifying glass and an information icon. The field is highlighted with a blue border.

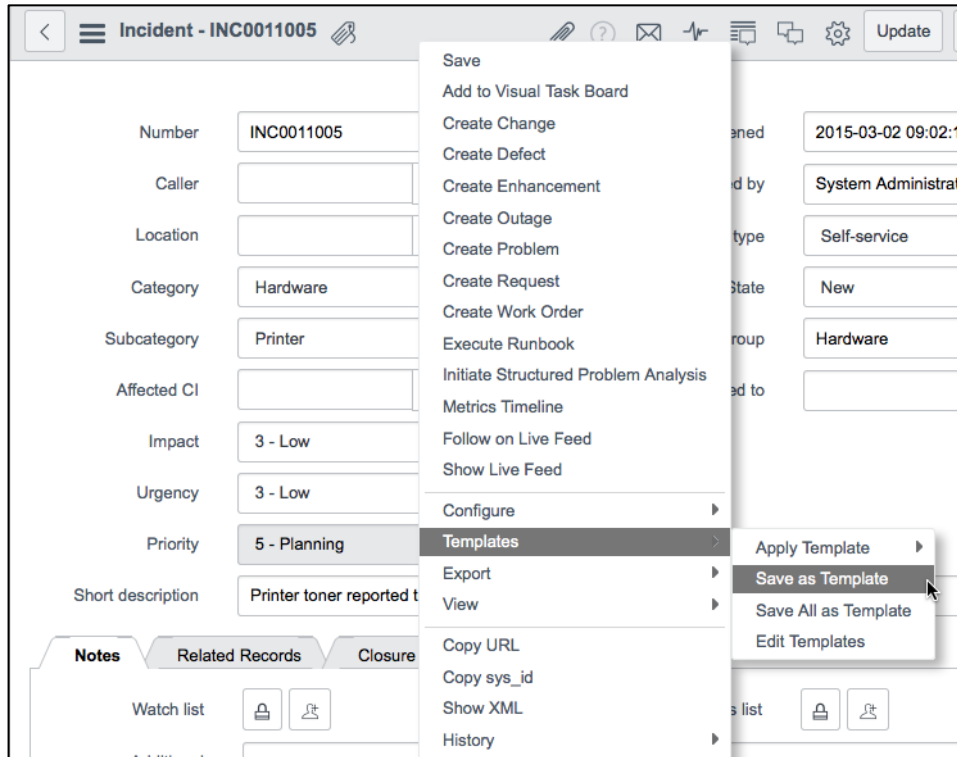
5. Ensure that the **Assigned to** field is blank.
6. In the **Short Description** field, type **Printer toner reported to be low**.



A screenshot of a text input field labeled 'Short description' containing the text 'Printer toner reported to be low.'. The field is highlighted with a blue border.

7. Click **Save**.

8. Right-click the bar at the top of the form and select **Templates > Save as template**.



9. In the **Name** field, overwrite the default with **Low Printer Toner**.

Name

10. In the **Global** checkbox, place a **checkmark**.

Global ☒

11. In the **Short description** field, type **Printer toner reported to be low**.

Short description

12. To the right of **Opened**, click the **X** to remove this field from the template.

13. To the right of **Opened by**, click the **X** to remove this field.

14. Click the **Update** button.

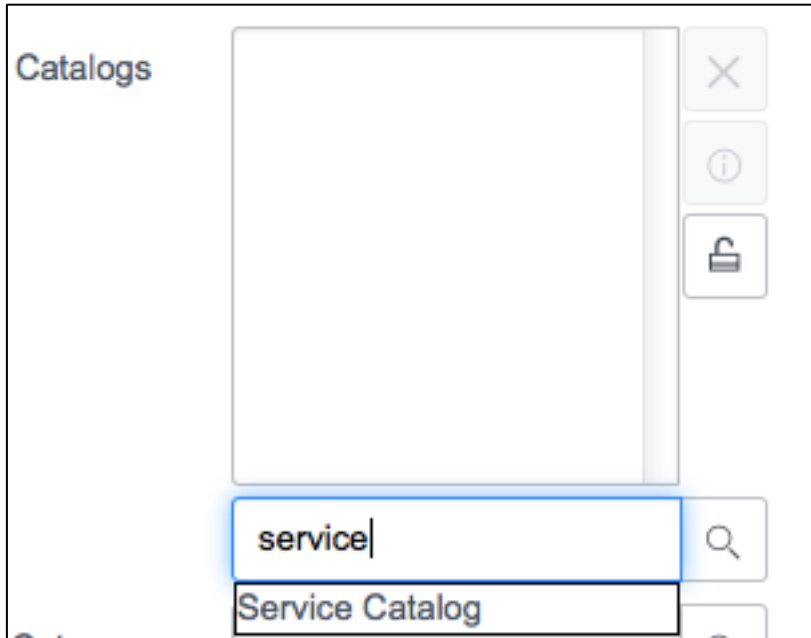
Create a New Record Producer

1. Navigate to **Service Catalog > Record Producers**.
2. Click **New**.
3. In the **Name** field, type **Report a Printer with Low Toner**.

4. In the **Table** name drop-down list, select **Incident [incident]**.

5. Next to **Catalogs**, click the **lock** icon to expand the interface.

6. Beneath **Catalogs** in the field with a magnifying glass, type **service** and select **Service Catalog**.

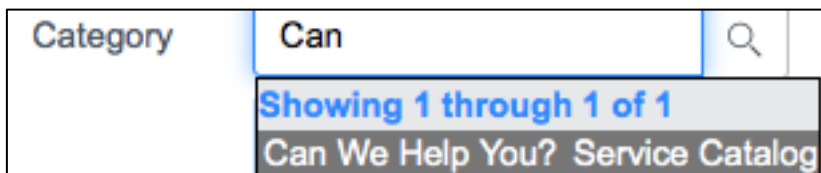


Catalogs

service

Service Catalog

7. In the **Category** field, type **Can** and select **Can We Help You?**



Category

Can

Showing 1 through 1 of 1

Can We Help You? Service Catalog

8. Click the **What it will contain** tab.

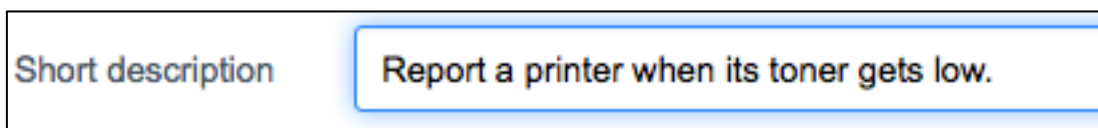


Accessibility

What it will contain

Generated Record Data

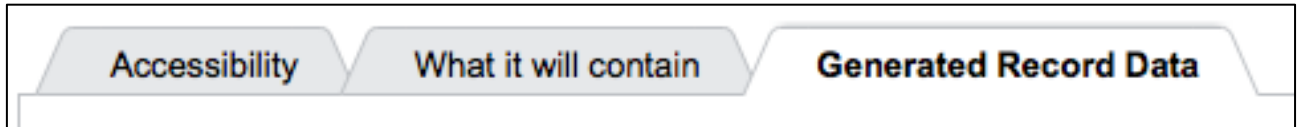
9. In the **Short Description** field, type **Report a printer when its toner gets low.**



Short description

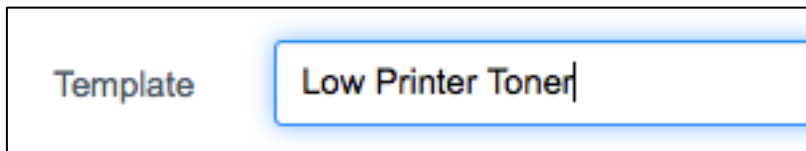
Report a printer when its toner gets low.

10. Click the **Generated Record Data** tab.



The screenshot shows a horizontal tabbed interface with three tabs: 'Accessibility', 'What it will contain', and 'Generated Record Data'. The 'Generated Record Data' tab is selected and highlighted in a darker shade.

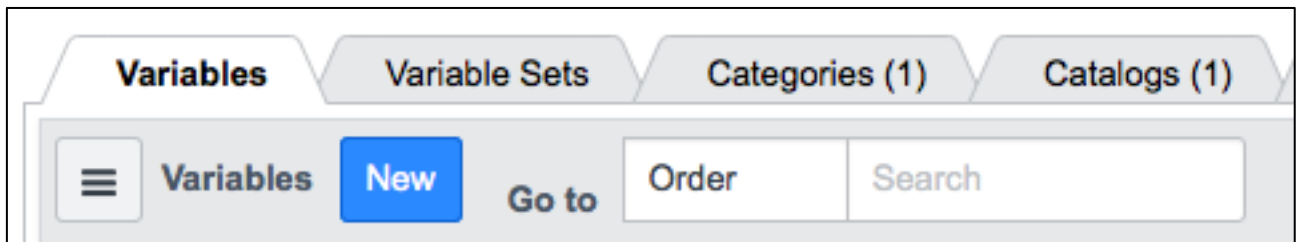
11. In the **Template** field, type **Low Printer Toner**, then click **Save**.



The screenshot shows a form with a label 'Template' and a text input field. The input field contains the text 'Low Printer Toner' and is highlighted with a blue border.

Create New Variables

1. At the bottom of the form, next to **Variables**, click **New**.



The screenshot shows a horizontal tabbed interface with four tabs: 'Variables', 'Variable Sets', 'Categories (1)', and 'Catalogs (1)'. The 'Variables' tab is selected. Below the tabs, there is a section with a hamburger menu icon, the label 'Variables', a blue 'New' button, a 'Go to' label, and a search bar with the text 'Order' and 'Search'.

2. In the **Map to field** checkbox, place a **checkmark**.



The screenshot shows a form with a label 'Map to field' and a checkbox. The checkbox is checked and highlighted with a blue border.

3. In the **Field** drop-down list, select **Affected CI**.



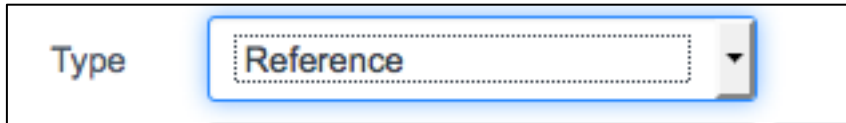
The screenshot shows a form with a label 'Field' and a drop-down list. The drop-down list is open, showing the text 'Affected CI' and a downward arrow.

4. In the **Mandatory** checkbox, place a **checkmark**.



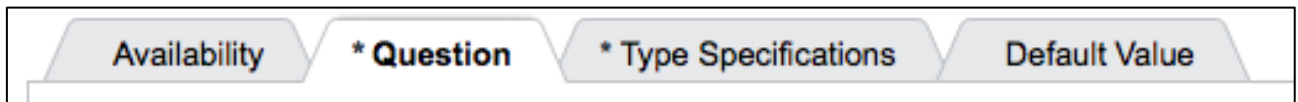
The screenshot shows a form with a label 'Mandatory' and a checkbox. The checkbox is checked and highlighted with a blue border.

5. In the **Type** drop-down list, select **Reference**.



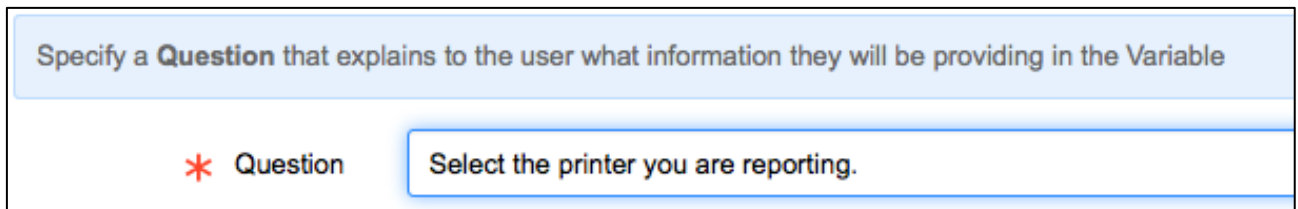
A screenshot of a form field labeled "Type". To its right is a drop-down menu with a dashed border. The word "Reference" is displayed inside the menu, and a small downward-pointing arrow is visible on the right side of the menu box.

6. Click the **Question** tab.



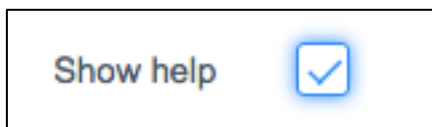
A screenshot of a tabbed interface with four tabs: "Availability", "* Question", "* Type Specifications", and "Default Value". The "Question" tab is highlighted with a darker background and a blue border, indicating it is the active tab.

7. In the **Question** field, type **Select the printer you are reporting**.



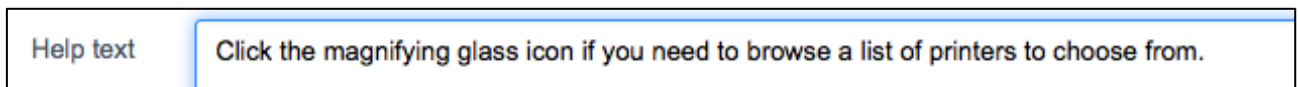
A screenshot of the "Question" field. At the top, a light blue banner contains the text "Specify a **Question** that explains to the user what information they will be providing in the Variable". Below this, the label "* Question" is followed by a text input field containing the text "Select the printer you are reporting".

8. In the **Show help** checkbox, place a **checkmark**.



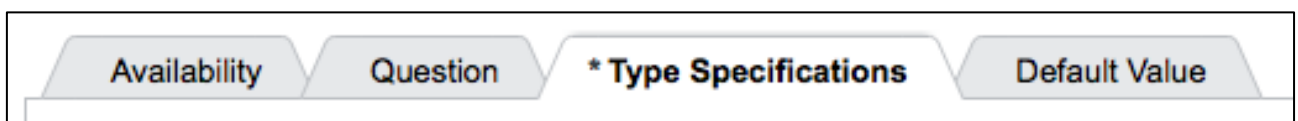
A screenshot of a form element labeled "Show help" followed by a checkbox. The checkbox is checked, with a blue checkmark visible inside the box.

9. In the **Help text** field, type **Click the magnifying glass icon if you need to browse a list of printers to choose from**.



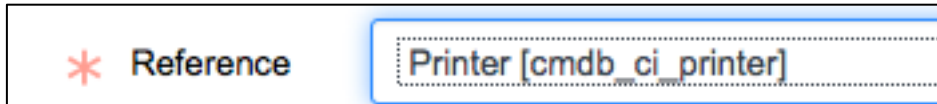
A screenshot of the "Help text" field. The label "Help text" is on the left, and the text input field contains the text "Click the magnifying glass icon if you need to browse a list of printers to choose from."

10. Click the **Type Specifications** tab.



A screenshot of a tabbed interface with four tabs: "Availability", "Question", "* Type Specifications", and "Default Value". The "Type Specifications" tab is highlighted with a darker background and a blue border, indicating it is the active tab.

11. In the **Reference** drop-down list, select **Printer [cmdb_ci_printer]**.



A screenshot of a software interface showing a 'Reference' drop-down list. The word 'Reference' is preceded by a red asterisk. The selected item in the list is 'Printer [cmdb_ci_printer]'.

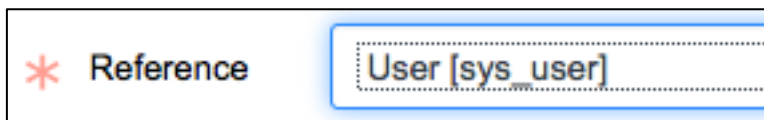
12. Click **Save**.

13. In the **Field** drop-down list, select **Caller**.



A screenshot of a software interface showing a 'Field' drop-down list. The word 'Field' is preceded by a red asterisk. The selected item in the list is 'Caller'.

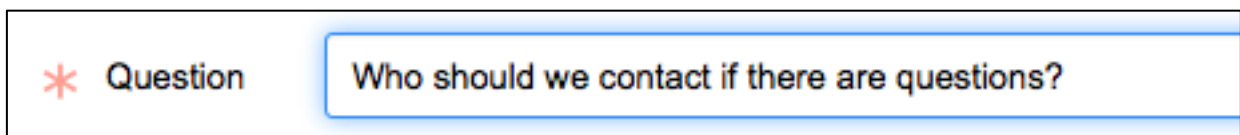
14. In the **Type Specifications** Tab > **Reference** field drop-down list, select **User [sys_user]**.



A screenshot of a software interface showing a 'Reference' field drop-down list. The word 'Reference' is preceded by a red asterisk. The selected item in the list is 'User [sys_user]'.

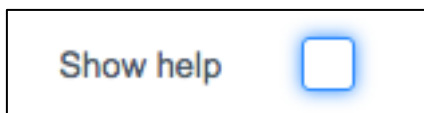
15. Click the **Question** tab.

16. In the **Question** field, delete the existing data and type **Who should we contact if there are questions?**



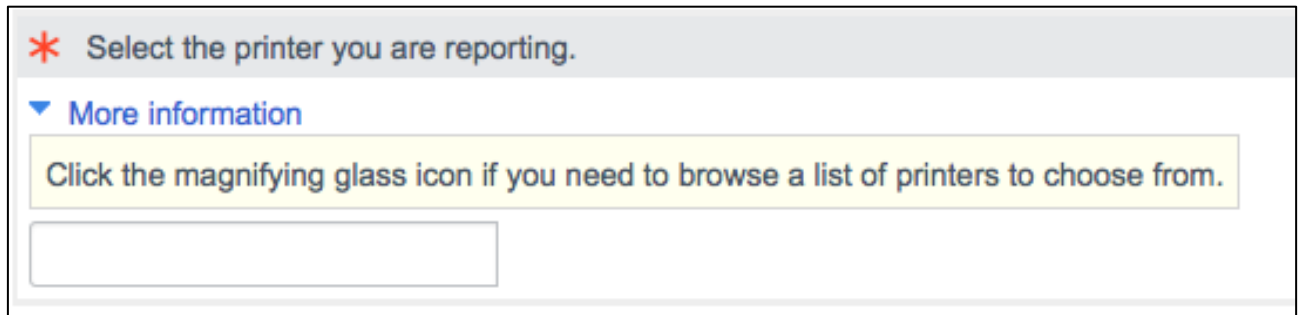
A screenshot of a software interface showing a 'Question' field. The word 'Question' is preceded by a red asterisk. The text 'Who should we contact if there are questions?' is entered in the field.

17. In the **Show help** checkbox, remove the **checkmark**.



A screenshot of a software interface showing a 'Show help' checkbox. The checkbox is currently unchecked.

- Under **Select the printer you are reporting**, click **More information** to expand your help text.

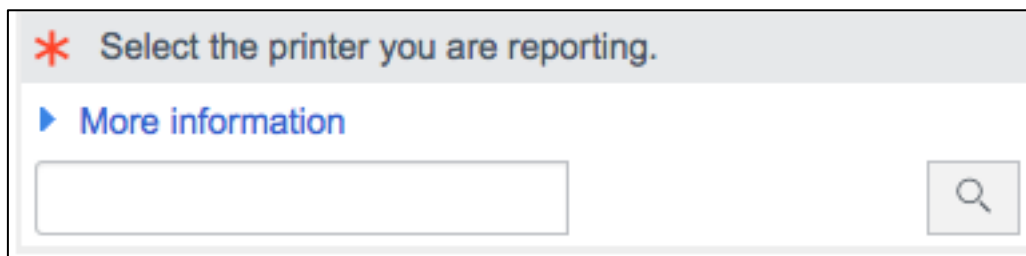


* Select the printer you are reporting.

▼ More information


Click the magnifying glass icon if you need to browse a list of printers to choose from.

- Under **Select the printer you are reporting**, click the **magnifying glass**.

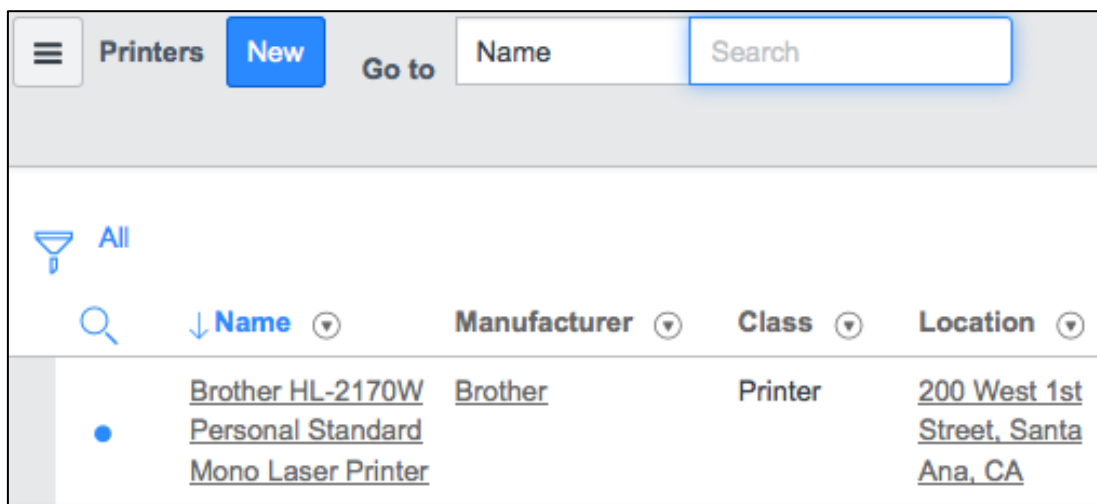


* Select the printer you are reporting.

► More information

- Select the first printer in the list.



☰	Printers	New	Go to	Name	Search
🔍	All				
🔍	↓ Name ▼	Manufacturer ▼	Class ▼	Location ▼	
●	<u>Brother HL-2170W</u> <u>Personal Standard</u> <u>Mono Laser Printer</u>	<u>Brother</u>	Printer	<u>200 West 1st</u> <u>Street, Santa</u> <u>Ana, CA</u>	

- Under **Who should we contact if there are questions**, type **Joe** and select **Joe Employee**.

* Who should we contact if there are questions?

Joe

Showing 1 through 4 of 4

Joe Employee employee@example.com

- Click **Submit**.

Your incident should look like this:

< Incident - INC0011006

Update Resolve Incident Delete

Number INC0011006

Caller Joe Employee

Location

Category Hardware

Subcategory Printer

Affected CI Brother HL-2170W Persc

Impact 3 - Low

Urgency 3 - Low

Priority 5 - Planning

Short description Printer toner reported to be low.

Opened 2015-03-02 10:49:30

Opened by System Administrator

Contact type Self-service

State New

Assignment group Hardware

Assigned to

- Navigate to **Lab Management > Report Lab Progress**.

8. Enter any comments regarding this lab.

Comments and questions:

9. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

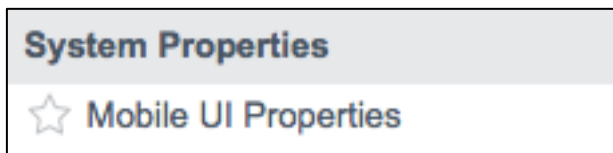
Lab Goal

Mobile access makes it easier for users to submit requests, update records, and check the status of work in progress. This lab explains how to publish an item to the mobile version of the Service Catalog and add access to an application via the Smartphone interface.

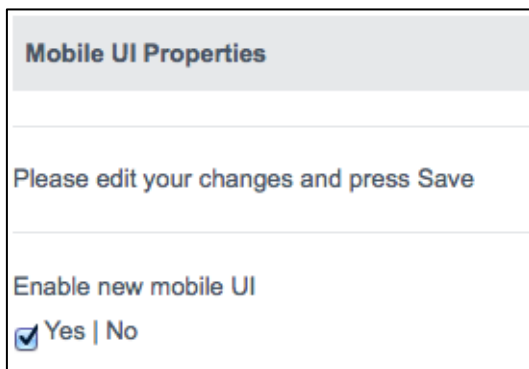
Lab 10 Configure the Mobile UI

Ensure the Mobile UI is Enabled

1. Navigate to **System Properties > Mobile UI Properties**.



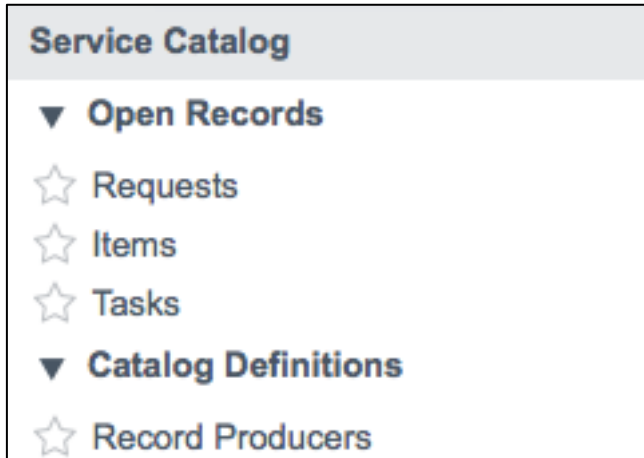
2. Ensure there is a **checkmark** beneath **Enable new mobile UI**.



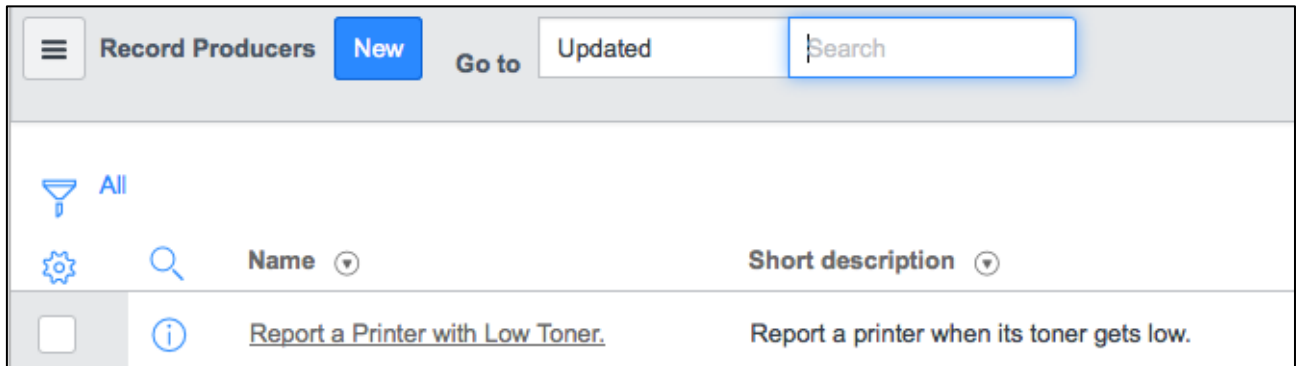
3. Click **Save**.

Publish a Service Catalog Item to the Mobile Interface

1. Navigate to **Service Catalog > Record Producers**.

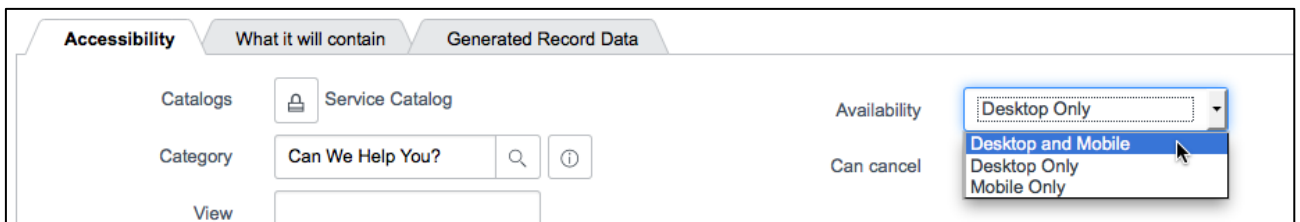


2. Under the **Name** column, click on **Report a Printer with Low Toner**.



NOTE: This step assumes you have completed the Create a Record Producer lab.

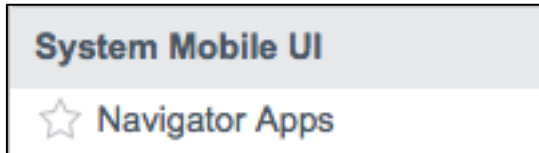
3. In the **Accessibility** tab > **Availability** drop-down list, select **Desktop and Mobile**.



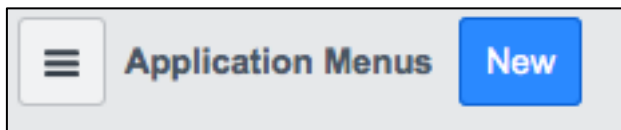
4. Click **Update**.

Publish an Application to the Mobile Interface

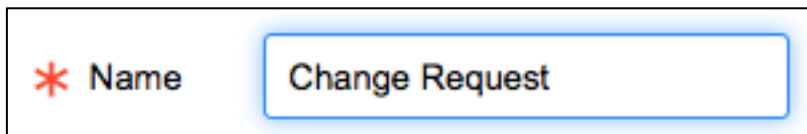
1. Navigate to **System Mobile UI > Navigator Apps**.



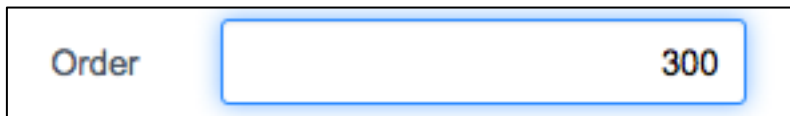
2. Click the **New** button.



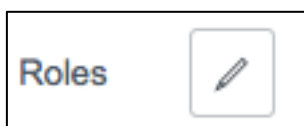
3. In the **Name** field, type **Change Request**.



4. In the **Order** field, type **300**.



5. Next to **Roles**, click the **Pencil** icon to expand the interface.

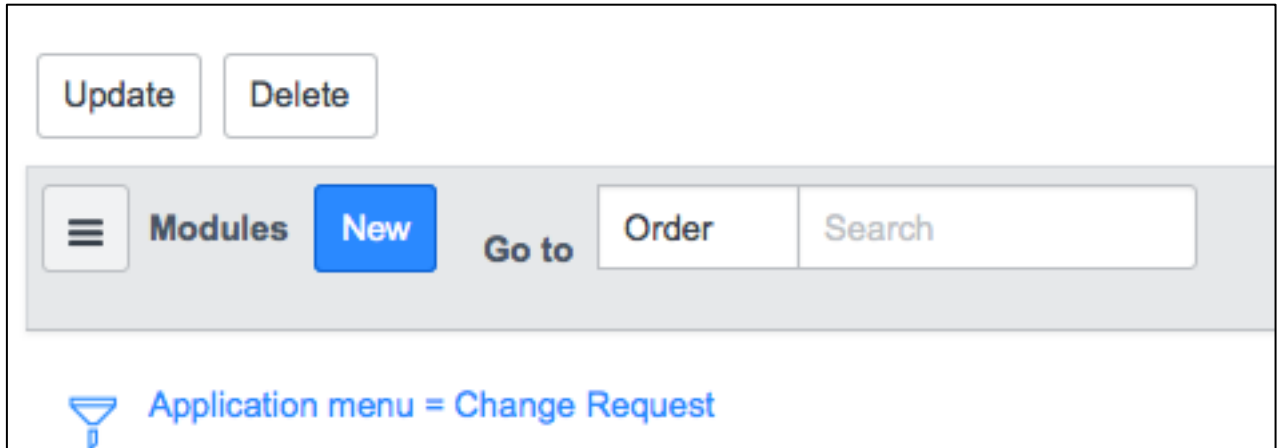


6. In the **Available** column, double-click **itil** to add it to the **Selected** column.

The screenshot shows a 'Roles' configuration window. It is divided into two main sections: 'Available' and 'Selected'. The 'Available' section contains a list of roles: inventory_user, itil, itil_admin, itsa_fulfiller, knowledge, knowledge_admin, knowledge_manager, kt_user, list_updater, live_feed_admin, and metric_admin. The 'itil' role is highlighted with a blue background. To the right of the list are two arrow buttons, one pointing right and one pointing left. The 'Selected' section is currently empty. At the bottom right of the 'Selected' section is a blue button labeled 'Done'.

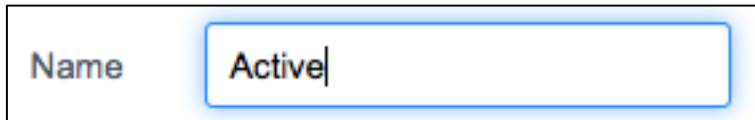
7. Click **Done**.

8. Next to **Modules**, click the **New** button.



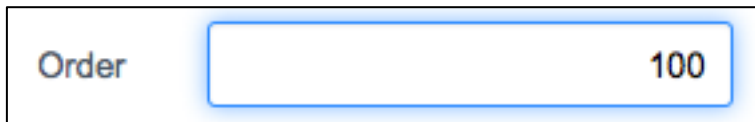
The screenshot shows a navigation bar with a hamburger menu icon, the text 'Modules', a blue 'New' button, and a 'Go to' section containing an 'Order' button and a search input field. Below the navigation bar, a blue funnel icon is followed by the text 'Application menu = Change Request'.

9. In the **Name** field, type **Active**.



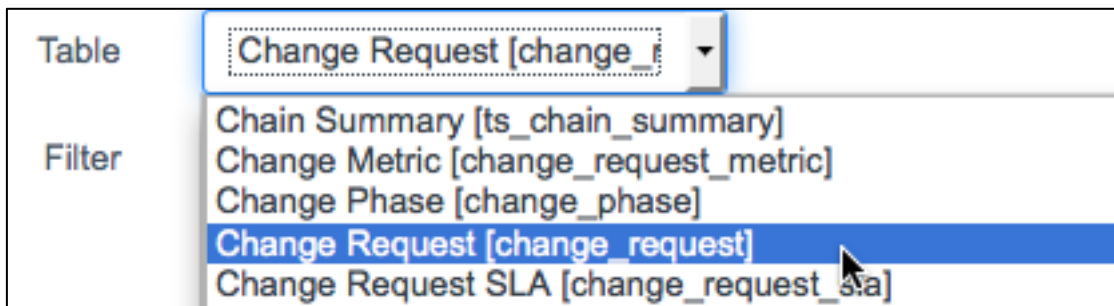
The screenshot shows a form field labeled 'Name' with the text 'Active' entered inside it.

10. In the **Order** field, type **100**.



The screenshot shows a form field labeled 'Order' with the text '100' entered inside it.

11. In the **Table** drop-down list, select **Change Request [change_request]**.



The screenshot shows a form field labeled 'Table' with a drop-down menu open. The menu lists several options: 'Chain Summary [ts_chain_summary]', 'Change Metric [change_request_metric]', 'Change Phase [change_phase]', 'Change Request [change_request]', and 'Change Request SLA [change_request_sla]'. The 'Change Request [change_request]' option is highlighted in blue, and a mouse cursor is pointing at it.

12. In the -- **choose field** -- drop-down list, select **Active**.



The screenshot shows a filter configuration interface. On the left, there is a 'Filter' label. To its right are two buttons: 'Add Filter Condition' and 'Add "OR" Clause'. Below these buttons is a dropdown menu with 'Active' selected. To the right of the dropdown menu is a field containing 'is'. Further right is a field containing 'true'. To the right of the 'true' field are three buttons: 'AND', 'OR', and 'X'.

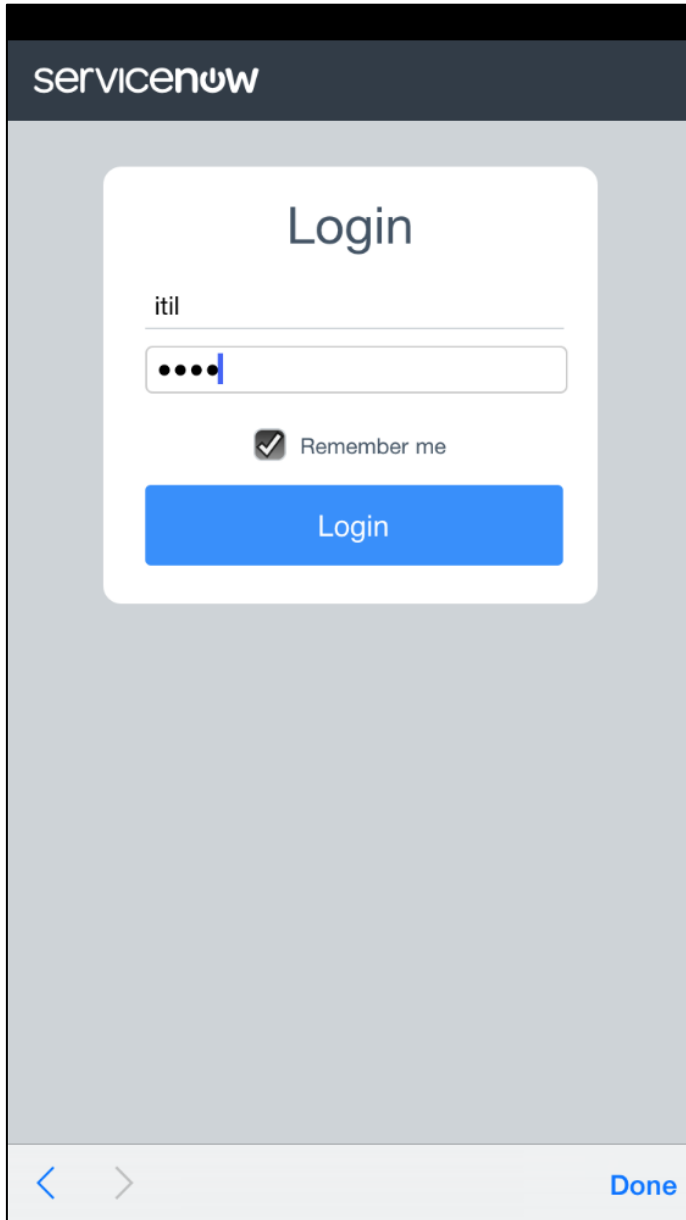
13. Click **Save**.

Lab Success Verification

NOTE: Testing the lab success requires either a smartphone with a supported browser and a working Internet connection, or a second browser. If you do not have access to a smartphone, use a separate session or another browser and log into the smartphone interface. To do this, either open a different browser to the lab instance, or right-click on the browser's shortcut and start a private session. On Chrome, this is called "New incognito window." On Firefox, it is called "New private window." On Internet Explorer, it is called "Start InPrivate Browsing." In the new browser window, change the end of the URL of the instance from **\navpage.do** to **\$m.do**. For a list of supported smartphones, please visit the wiki: https://wiki.servicenow.com/index.php?title=Smartphone_Interface#Supported_Devices

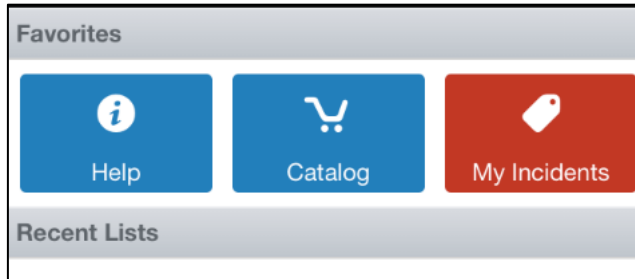
1. Open a browser on your smartphone mobile device or a new browser (see note above).
2. Navigate to your lab instance URL.

3. Log in using the **itil** credentials provided on the cover:

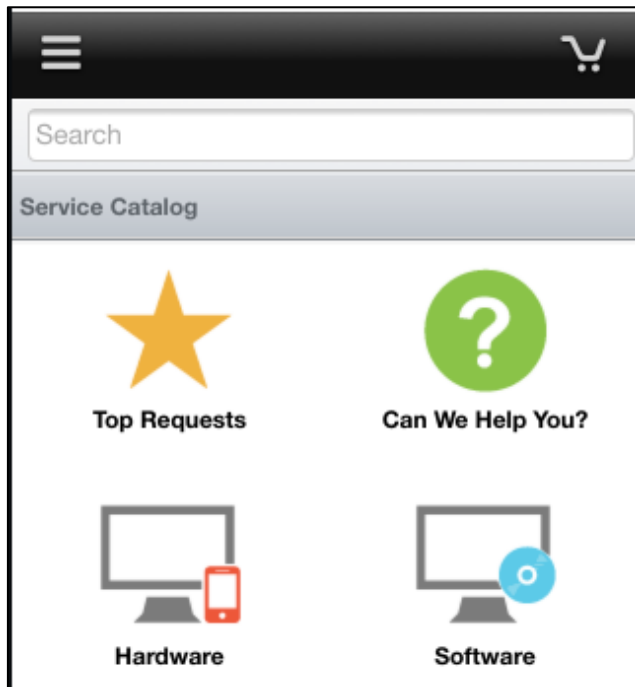
A screenshot of the ServiceNow mobile application login screen. The screen has a dark grey header with the 'servicenow' logo in white. Below the header is a light grey background. In the center is a white rounded rectangle containing the 'Login' title. Under the title, the username 'itil' is entered into a text field. Below the text field is a password field with four black dots and a blue cursor. Under the password field is a checkbox labeled 'Remember me' which is checked. Below the checkbox is a blue button with the text 'Login'. At the bottom of the screen is a light grey bar with a blue back arrow, a grey forward arrow, and the word 'Done' in blue.

4. Click **Login** or **Done**.

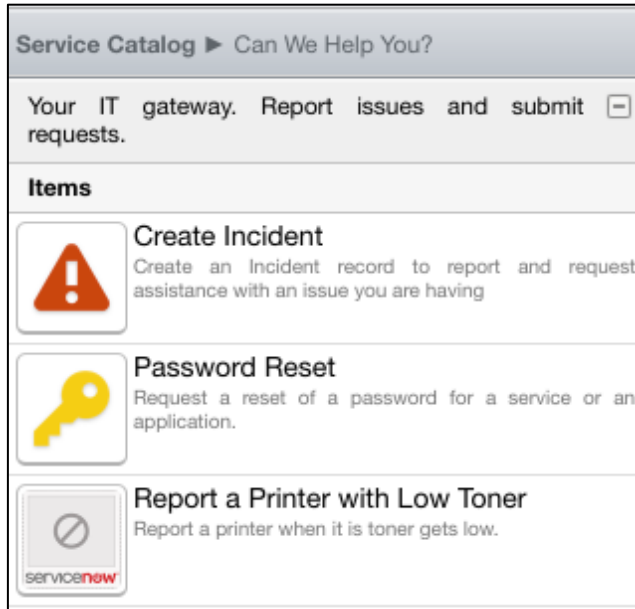
5. Click the **Catalog** icon.



6. Click **Can We Help You?**




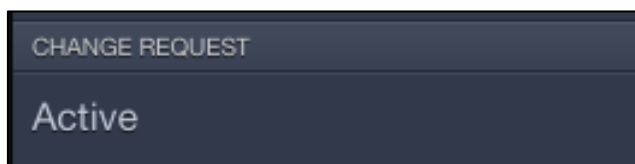
7. Verify the **Report a Printer with Low Toner** is available.



8. Click the **Home** icon.

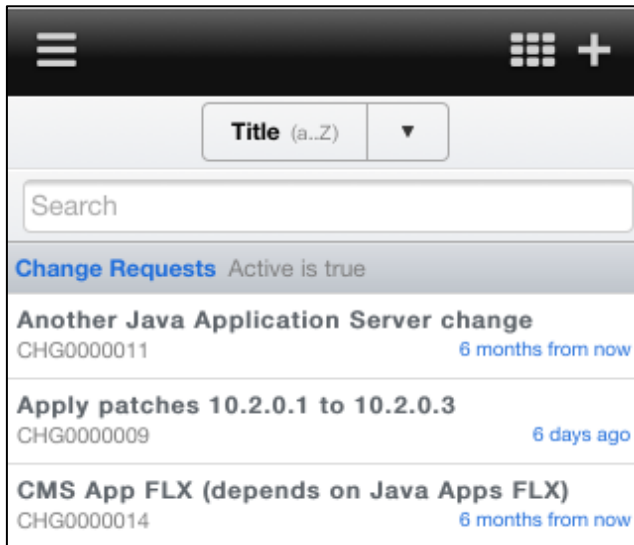


9. Open the application navigator, by tapping the  icon on the top-left side of the interface.
10. Scroll down to find the **Change Request** application.



11. Under **Change Requests**, click **Active** to view the active Change Requests.

Your screen should look similar to this:



12. Navigate to **Lab Management > Report Lab Progress**.

13. Enter any comments regarding this lab.

Comments and questions:

14. In the main window, click the **I am done!** button.

Let instructor know how you are doing on the lab(s) by selecting the appropriate button.

I am done!

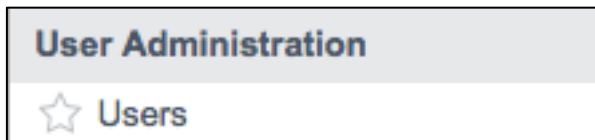
Lab Goal

Access Control Rules determine how users can interact with ServiceNow. This lab explains how to create new rules to limit access to a newly created field.

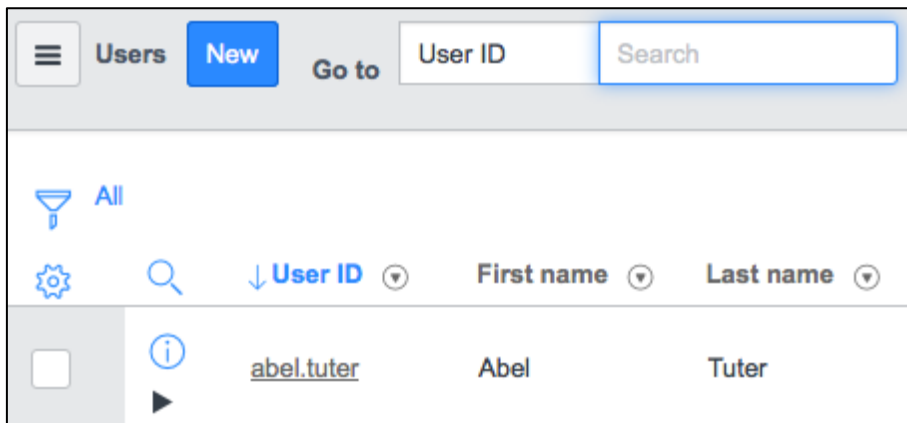
Lab 11 Create Access Control Rules

Assign Roles to a User

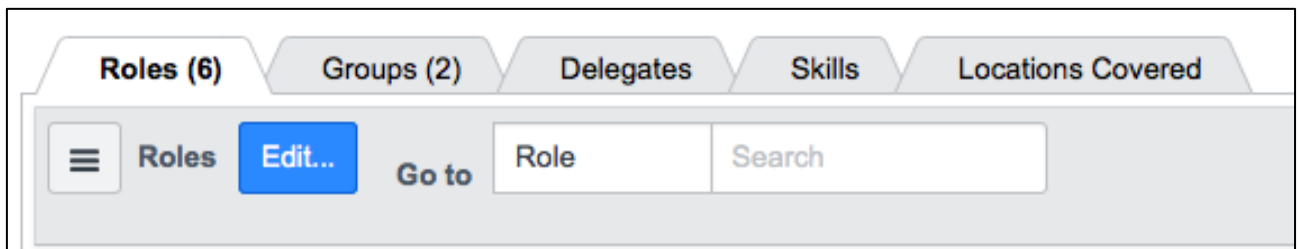
1. Navigate to **User Administration > Users**.



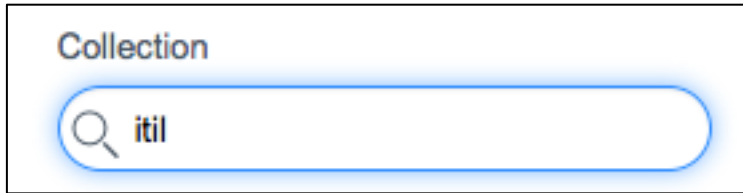
2. Click on **abel.tuter** to edit the record.



3. Next to **Roles**, click the **Edit** button.

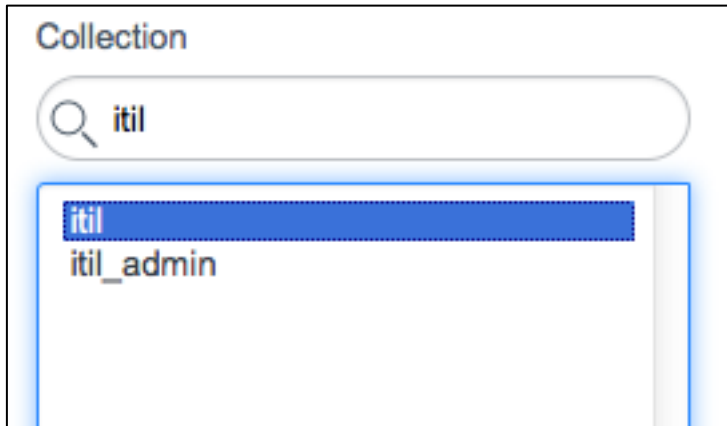


4. In the **Collection Search** field, type **itil**.



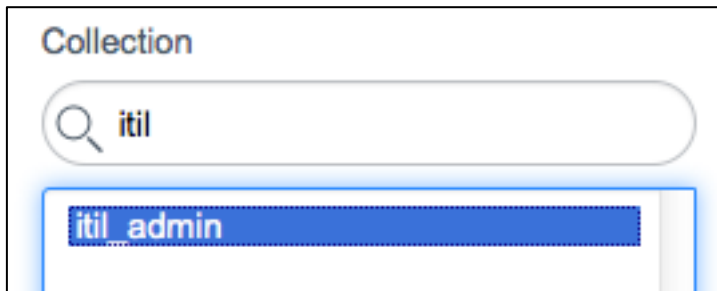
A screenshot of a web interface showing a search bar labeled "Collection". Inside the search bar, the text "itil" is entered next to a magnifying glass icon. The search bar has a blue glow effect around it.

5. In the **Collection** column, double-click **itil** to add it to the **Roles List** column.



A screenshot of the same web interface. The search bar now shows a dropdown menu. The dropdown menu is open, showing two options: "itil" and "itil_admin". The "itil" option is highlighted with a blue background. The search bar still has the "itil" text and the magnifying glass icon.

6. In the **Collection** column, double-click **itil_admin** to add it to the **Roles List** column.



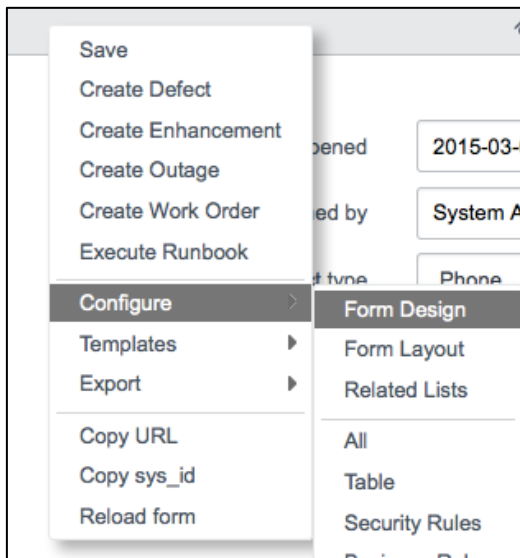
A screenshot of the same web interface. The dropdown menu is still open, but now the "itil_admin" option is highlighted with a blue background. The search bar still shows "itil" and the magnifying glass icon.

7. Click **Save**.

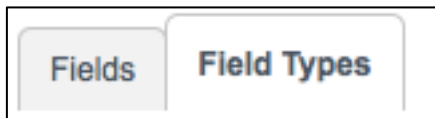
NOTE: The **itil_admin** role does not inherit the **itil** role and must be modified, or the **itil** role must be added explicitly to grant **itil** functionality.

Create a New Field

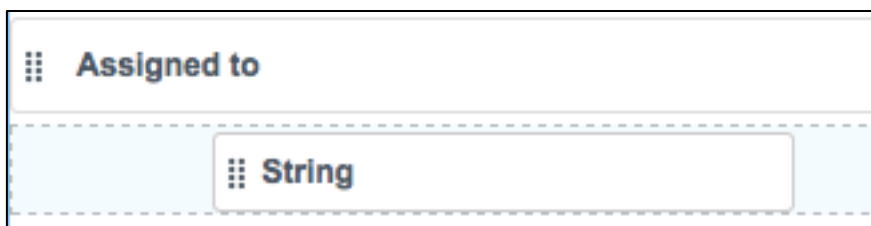
1. Navigate to **Incident > Create New**.
2. Right-click the bar at the top of the form and select **Configure > Form Design**.




3. Click the **Field Types** tab.

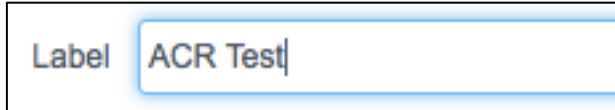


4. From the left pane, drag and drop **String** to the main pane right column under **Assigned to**.

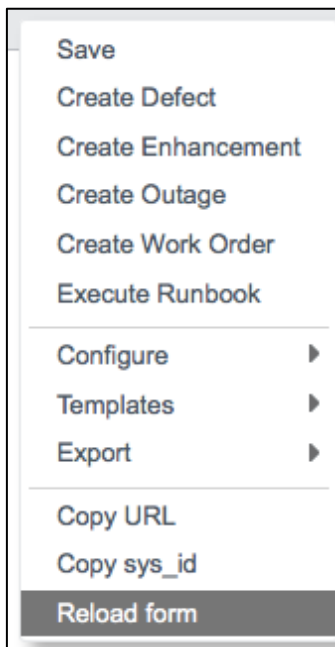


5. Click the **Configure icon**  to configure the **Field Properties**.

6. In the **Label** field, type **ACR Test**.

A screenshot of a form field. On the left, the word 'Label' is displayed. To its right is a text input box containing the text 'ACR Test'.

7. Press **Enter** or click the **X** to exit the **Field Properties** and click **Save**.
8. Close the **Form Design** tab or window and return to the previous tab or window.
9. Right-click on the top bar and select **Reload form** to see the new **ACR Test** field.

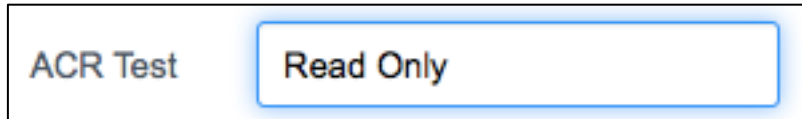


NOTE: This extends the schema of the database automatically. Make changes in an update set on a non-production instance and test prior to promoting to your production instance.

Observe the Field Using the Itil Role

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.
2. Type **Abel** and select **Abel Tuter**.
3. Click **OK**.
4. Navigate to **Incident > Create New**.

5. In the **ACR Test** field, type **Read Only**.

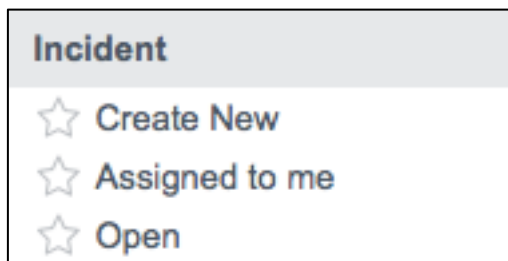


A screenshot of a form field labeled "ACR Test". The field contains the text "Read Only". The text "Read Only" is highlighted with a blue border and a light blue glow effect.

6. Click **Submit**.

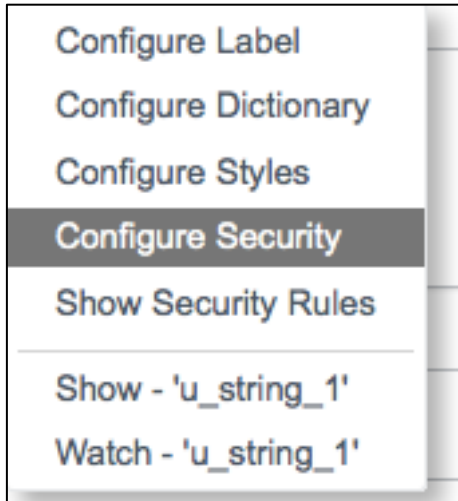
Create a Write Access Control Rule

1. Click the **Person** icon next to **Impersonating: Abel Tuter** to bring up the **Impersonate User** window.
2. Double-click on **System Administrator** to return to this user.
3. Navigate to **Incident > Open**.

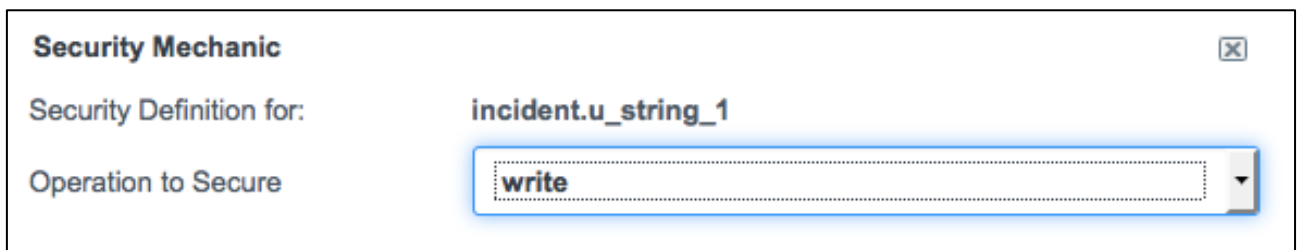


4. Click on the **Incident** you most recently submitted.

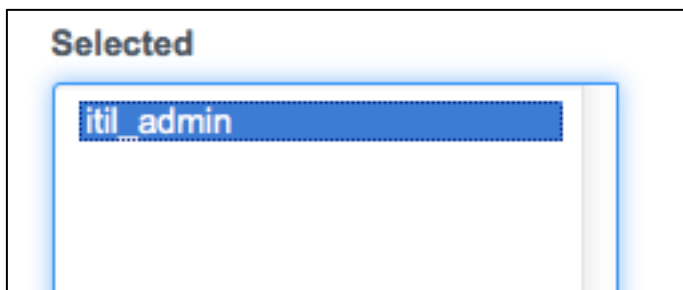
5. Right-click on the **ACR Test** field and select **Configure Security**.



6. In the **Operation to Secure** drop-down list, select **write**.



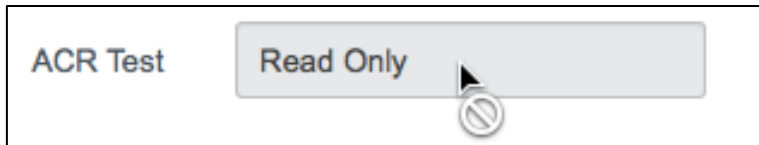
7. In the **Available** column, double-click on **itil_admin** to add the role to the **Selected** column.



8. Click **OK**.
9. In the top right of the **Security Mechanic** window, click the **X** to close it.

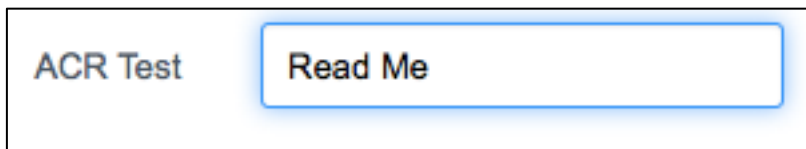
Test the Write Access Control Rule

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.
2. Double-click **ITIL User**.
3. Navigate to **Incident > Open**.
4. Click on the **Incident** you most recently edited.
5. Verify the **ACR Test** field may not be edited by this user.



NOTE: Read only fields are visually represented by the shaded gray field.

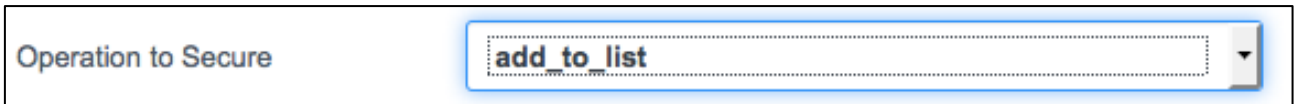
6. Click the **Person** icon next to **Impersonating: ITIL User** to bring up the **Impersonate User** window.
7. Double-click on **Abel Tuter**.
8. Navigate to **Incident > Open**.
9. Click on the **Incident** you most recently edited.
10. In the **ACR Test** field, overwrite the data with **Read Me**.



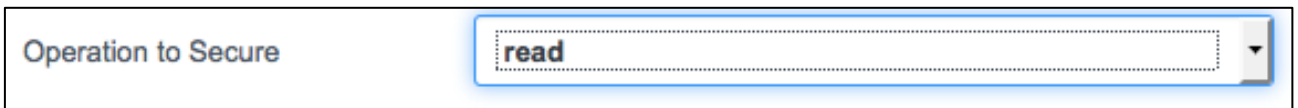
11. Click the **Update** button.

Create Additional Access Control Rules

1. Click the **Person** icon next to **Impersonating: Abel Tuter** to bring up the Impersonate User window.
2. Double-click on **System Administrator**.
3. Navigate to **Incident > Create New**.
4. Right-click on **ACR Test** and select **Configure Security**.
5. In the **Operation to Secure** drop-down list, select **add_to_list**.

A screenshot of a software interface showing a dropdown menu. The label 'Operation to Secure' is on the left. The dropdown list is open, showing 'add_to_list' as the selected option. The entire dropdown area is highlighted with a blue border.

6. In the **Available** column, double-click **itil_admin** to add the role to the **Selected** column.
7. Click **OK**.
8. In the **Operation to Secure** drop-down list, select **read**.

A screenshot of a software interface showing a dropdown menu. The label 'Operation to Secure' is on the left. The dropdown list is open, showing 'read' as the selected option. The entire dropdown area is highlighted with a blue border.

9. In the **Available** column, double-click **itil_admin** to add the role to the **Selected** column.
10. Click **OK**.
11. In the **Operation to Secure** drop-down list, select **report_on**.

A screenshot of a software interface showing a dropdown menu. The label 'Operation to Secure' is on the left. The dropdown list is open, showing 'report_on' as the selected option. The entire dropdown area is highlighted with a blue border.

12. In the **Available** column, double-click **itil_admin** to add the role to the **Selected** column.
13. Click **OK**.
14. In the top right of the **Security Mechanic** window, click the **X** to close it.

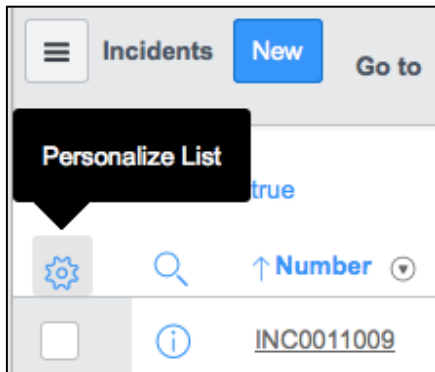
Lab Success Verification

1. Click the **Person** icon next **Welcome: System Administrator** to impersonate another user.
2. Double-click **ITIL User**.
3. Navigate to **Incident > Open**.
4. Click on the **Incident** you most recently edited.
5. Verify the **ACR Test** field is not visible to this user.



A screenshot of the 'Incident Open' form. It shows two search fields: 'Assignment group' and 'Assigned to'. Each field has a search icon (magnifying glass) to its right.

6. Click **Update**.
7. Click the **Personalize List** icon at the far left of the top bar of the Incident **List**.

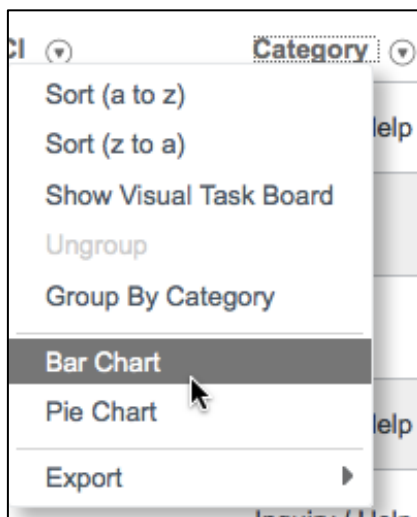


8. In the **Available** column, verify the **ACR Test** field is not available for selection.

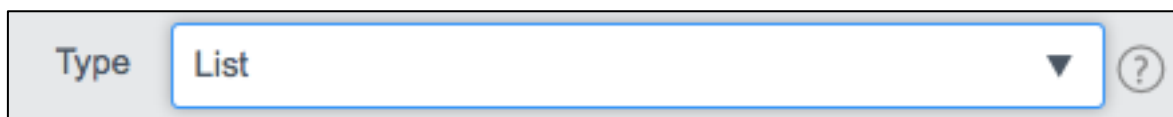


9. Click **Cancel**.

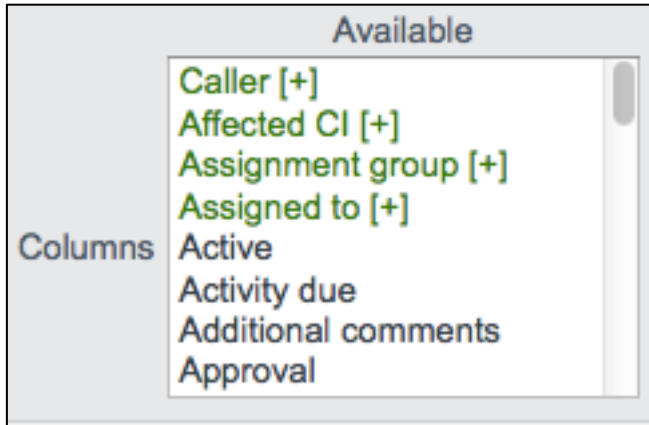
10. Right-click **Category** on the bar and select **Bar Chart**.



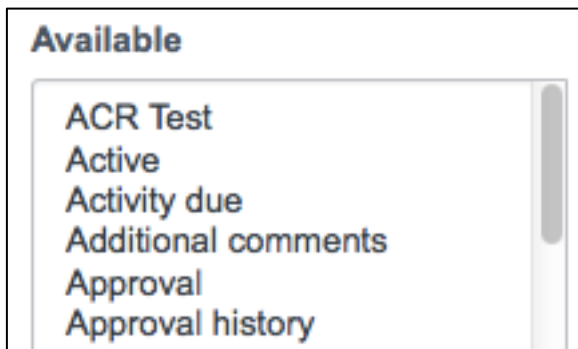
11. In the **Type** drop-down list, select **List**.



12. In the **Available** column, verify the **ACR Test** field is not visible.

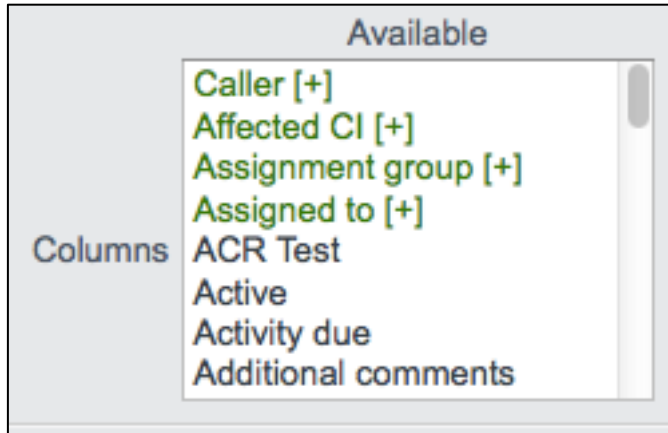


13. Click the **Person** icon next to **Impersonating: ITIL User** to bring up the **Impersonate User** window.
14. Double-click on **Abel Tuter**.
15. Navigate to **Incident > Open**.
16. Click the **Personalize List** cog at the far left of the top bar of the **Incident List**.
17. In the **Available** column, verify the **ACR Test** field is available for selection.



18. Click **Cancel**.
19. Right-click **Category** on the bar and select **Pie Chart**.
20. In the **Type** drop-down list, select **List**.

21. In the **Available** column, verify the **ACR Test** field is visible.



22. Click the **Person** icon next to **Impersonating: Abel Tuter** to bring up the **Impersonate User** window.

23. Double-click on **System Administrator**.

24. Navigate to **Lab Management > Report Lab Progress**.

25. Enter any comments regarding this lab.

A screenshot of a software interface showing a text input area. The area is titled 'Comments and questions:' and contains a large, empty rectangular text box with a small diagonal line in the bottom right corner.

26. In the main window, click the **I am done!** button.

A screenshot of a software interface showing a text input area. The area contains the text 'Let instructor know how you are doing on the lab(s) by selecting the appropriate button.' and a button labeled 'I am done!'.