

ServiceNow project Submission

Submitted by
CHAITHANYA SULLURU au723921244046

Arjun College of Technology, Coimbatore
Anna University, Chennai

Automating Data Population In ServiceNow: Streamlining ProgramManagement

Project Overview:

As an IT administrator at a company using ServiceNow, you have been tasked with setting up a data lookup mechanism. This mechanism will help automatically populate certain fields in a custom table called "Program" based on predefined values in another table called "testing lookups". The "Program" table includes fields for technology, tracker, and trainer. The "testing lookups" table contains the same fields and will provide the values used for the lookup.

Objectives :

Automated Data Entry and Updates

- Objective: Automate the process of entering or updating records in ServiceNow, such as incidents, changes, service requests, or program-related tasks, based on predefined rules.
- Benefit: This reduces the need for manual data input and ensures that records are always up-to-date, saving time for the team and preventing human error.

2. Integration with External Data Sources

- Objective: Integrate ServiceNow with other platforms and systems, such as databases, APIs, or third-party applications, to automatically populate data into the system.
- Benefit: Seamlessly sync data from various sources (e.g., CRM, HR systems, IT tools) to ServiceNow, ensuring that the program management team has a complete view of all relevant information.

3. Data Validation and Consistency Checks

- Objective: Implement automated validation rules to ensure data integrity and consistency before populating into ServiceNow.
- Benefit: This ensures that only accurate and valid data is entered into the system, minimizing the chances of data-related issues affecting program management.

Key Features and Concepts Used :

Knowledge on: Applications, Tables, Fields.

Knowledge on: Data lookup Definitions.

Detailed Steps to Solution :

Implementation

Step 1 : Creating Custom Table

1. Open “Tables” >> New.
2. Give the label name as “ program ”.
3. Click on Submit.

Table New record

ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).

A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: Program

* Name: u_program

Extends table: [Search]

Application: Global

Create module: ☒

Create mobile module: ☒

Add module to menu: -- Create new --

New menu name: Program

Columns | Controls | Application Access

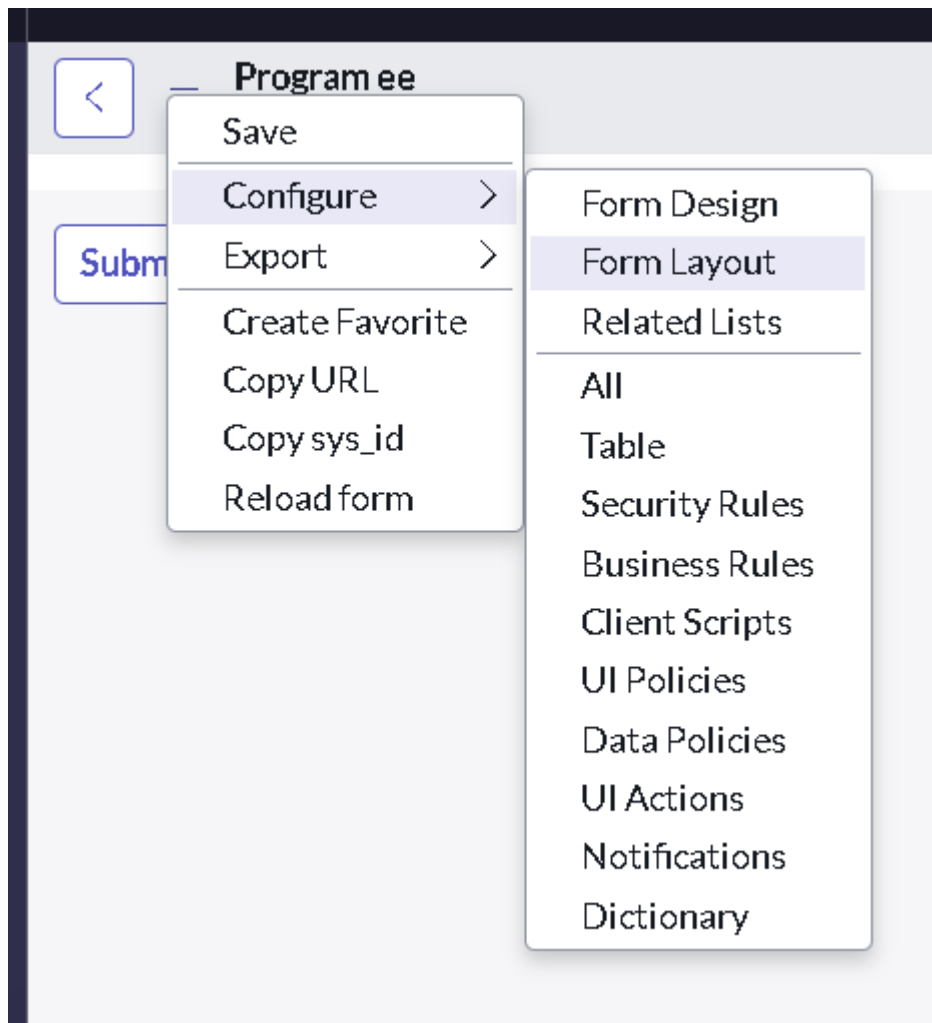
Table Columns: for text | Search

Dictionary Entries

	Column label	Type	Reference	Max length	Default value	Display
+	Insert a new row...					

Submit Cancel

4. Click on new to open record, click on the Additional Actions and go to configure >> select Form Layout.



5. Create fields as
 - a. Name : Technology
 - b. Type : choice

6. Click on Add
7. And follow the same instructions
8. For two more fields are
 - a. Tracker
 - b. Trainer
9. Add them and click on save.

The screenshot shows a 'New record' form for a 'program'. At the top, there is a header bar with a back arrow, a menu icon, the text 'program New record', and a 'Submit' button. Below the header, there are three dropdown menus labeled 'technology', 'tracker', and 'tranier', each with '-- None --' selected. At the bottom left of the form, there is a 'Submit' button.

10. Now right click on “ technology ” field click on Configure Choices.
11. Enter the item as “ Salesforce ” and click on Add.
12. Add two more items
 - a. ServiceNow
 - b. Testing
13. Click on save.

The screenshot shows a dialog titled 'Configuring technology Choices'. It has a back arrow on the left and a title bar.

Tailoring: u_program.u_technology
 program

The screenshot shows a configuration interface with two lists: 'Available' and 'Selected'. The 'Available' list is empty. The 'Selected' list contains three items: 'salesforce', 'serviceNow', and 'testing'. Between the lists are 'Add' and 'Remove' buttons. To the right of the 'Selected' list are 'Move up' and 'Move down' buttons. At the bottom, there are 'Save' and 'Cancel' buttons.

Enter new item:

14. Follow the same steps from 9 to 13 for remaining two fields.

15. Tracker values are:
 - a. Admin
 - b. Developer
16. Trainer values are:
 - a. Rakesh
 - b. Tarakesh
 - c. Ajay
 - d. Phani
 - e. Shivam
17. Click on save.

Step 2 : Creating a custom matcher table.

1. Open “Tables” >> New.
2. Give the label name as “ testing lookup ”.
3. Add “ Matcher Field Definition ” in the Extends table field.
4. Click on Submit.

Table New record

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A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)

* Label: Application: ⓘ

* Name: Create module: ☒

Extends table: ⓘ Create mobile module: ☒

Add module to menu: New menu name:

Columns Controls Application Access

Table Columns for text Search ⓘ

Dictionary Entries

Column label	Type	Reference	Max length	Default value	Display
+ Insert a new row...					

Submit Cancel

5. Follow the same steps from 4 to 17 from “ step - 1 ”.

6. And add another field from the Form Layout that is “ order ”.
7. Click on save.

Step 3 : Create records in matcher table

1. Follow the below figure to create a record.

testing lookup
New record

technology

tracker

tranier

Order

Submit

2. Follow the figure to create more records as shown in below figure.

technology	tracker	tranier	Active	Order
salesforce	admin	rakesh	true	100
salesforce	developer	tarakesh	true	200
serviceNow	admin	ajay	true	300
serviceNow	developer	shivam	true	400
testing	admin	shivam	true	500
testing	developer	shivam	true	600

Step 4 : Create Data Lookup Definition to automate the trainer

1. Search for Data Lookup Definition in All navigation.
2. Click on new.
3. Give name as “ program data lookup ”
4. Select the source table as “ program ”.
5. Select the matcher table as “ testing lookup ”.
6. Click on submit.

The screenshot shows the 'Data Lookup Definitions' form with the following details:

- Name:** program data lookup
- Source Table:** program [u_program]
- Matcher Table:** testing lookup [u_testing]
- Application:** Global
- Active:** ☒
- Run on form change:** ☒
- Run on insert:** ☒
- Run on update:** ☐

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

7. Again open the “ program data lookup ” record.
8. Scroll down under matcher field definitions and click on new.
9. Select the source table field : technology
10. And select the matcher table field : technology
11. Exact lookup match : checked.
12. Click on Submit.

The screenshot shows the 'Matcher Field Definitions' form with the following details:

- Data Lookup:** program data lookup
- Source table field:** technology
- Matcher table field:** technology
- Application:** Global
- Exact lookup match:** ☒

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

13. And create another Matcher field definitions for another field : tracker
14. Click on Setter field definition and click on new
15. Select the source table field : trainer
16. And select the matcher table field : trainer
17. Always replace the field : checked.
18. Click on Submit.

Setter Field Definitions
New record

Data Lookup:

* Source table field:

* Matcher table field:

Application:

Always replace: ☒

19. Click on update.

Data Lookup Definitions
program data lookup

* Name:

* Source Table:

* Matcher Table:

Application:

Active: ☒

Run on form change: ☒

Run on insert: ☒

Run on update: ☐

Matcher Field Definitions (2) **Setter Field Definitions (1)**

Data Lookup = program data lookup

<input type="checkbox"/>	Source table field	Matcher table field	Exact lookup match
<input type="checkbox"/>	u_tracker	u_tracker	false
<input type="checkbox"/>	u_technology	u_technology	true

1 to 2 of 2

Result

1. Go to the source table “ program ”.
2. Click on new .
3. Select any technology and tracker .
4. To check the trainer is automatically assigned to it.

program
New record

technology:

tracker:

tranier:

Testing and Validation :

Automated Data Entry and Updates

- **Objective:** Automate the process of entering or updating records in ServiceNow, such as incidents, changes, service requests, or program-related tasks, based on predefined rules.
- **Benefit:** This reduces the need for manual data input and ensures that records are always up-to-date, saving time for the team and preventing human error.

2. Integration with External Data Sources


- **Objective:** Integrate ServiceNow with other platforms and systems, such as databases, APIs, or third-party applications, to automatically populate data into the system.
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3. Data Validation and Consistency Checks

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4. Reporting and Dashboard Automation

- **Objective:** Automate the creation of reports and dashboards for program management teams, drawing from data automatically populated in ServiceNow.
- **Benefit:** This provides real-time insights into key metrics, program status, and resource allocation, allowing managers to make informed decisions quickly.



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Key Scenario's addressed by Servicenow for implementation of project:

Creating a custom matcher table.

1. Open "Tables" >> New.
2. Give the label name as " testing lookup ".

3. Add “ Matcher Field Definition ” in the Extends table field.

4. Click on Submit.

The screenshot shows the 'Table' configuration page in ServiceNow. The page title is 'Table New record'. At the top, there is a yellow notification bar stating: 'ServiceNow recommends creating custom tables in scoped applications. To learn more about creating scoped applications, click [here](#).' Below this is a blue informational box: 'A table is a collection of records in the database. Each record corresponds to a row in a table, and each field on a record corresponds to a column on that table. Applications use tables and records to manage data and processes. [More Info](#)'.

The main configuration area contains the following fields:

- * Label:
- * Name:
- Extends table: (with a search icon and an information icon)
- Application: (with an information icon)
- Create module: ☒
- Create mobile module: ☒
- Add module to menu: (dropdown menu)
- New menu name:

Below the configuration fields are three tabs: 'Columns', 'Controls', and 'Application Access'. The 'Columns' tab is active, showing a 'Table Columns' section with a dropdown set to 'for text' and a search bar. Below this is a 'Dictionary Entries' table with the following columns: Column label, Type, Reference, Max length, Default value, and Display. The table is currently empty, with a '+ Insert a new row...' button at the bottom.

At the bottom of the page are 'Submit' and 'Cancel' buttons.

5. Follow the same steps from 4 to 17 from “ step - 1 ”.

6. And add another field from the Form Layout that is “ order ”.

7. Click on save.

Conclusion :

In conclusion, automating data population in ServiceNow is a powerful approach to enhance program management by increasing efficiency, ensuring data accuracy, and optimizing workflows. By leveraging automation, organizations can reduce the burden of manual data entry, minimize human error, and keep data synchronized across integrated systems. The integration and automation of data-related processes provide program managers with timely insights, enabling better decision-making and resource allocation. Thorough testing and validation are essential to the success of the automation. By employing a comprehensive testing strategy that includes unit, integration, performance, security, and user acceptance testing, organizations can ensure that the automation functions correctly and aligns with business requirements. Continuous monitoring and exception handling mechanisms further guarantee the reliability and scalability of the solution over time. Ultimately, this project not only improves the operational efficiency of program management but also empowers teams to focus on strategic tasks, contributing to the overall growth and success of the organization. The automated solution will serve as a foundation for future enhancements and innovations in data management within ServiceNow.