ServiceNow Fundamentals Study Guide

- This study guide is designed to provide key concepts of ServiceNow Fundamentals and direct you to the officiel ServiceNow resources for further information.
- We recommend that you print this guide to take notes during the sessions and review them frequently so that you can use it as your reference for CSA studies

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Service Catalog

Learning Objectives

- Describe the benefits and features of the Service Catalog.
- Configure the order forms for use.

Service Catalog - Order Services & Products

- Roles: **admin** or **catalog_admin**
- Define categories & subcategories (or parent vs child categories)
- You may have multiple Service Catalogs to serve different needs within the organization (e.g., service desk, training portal)
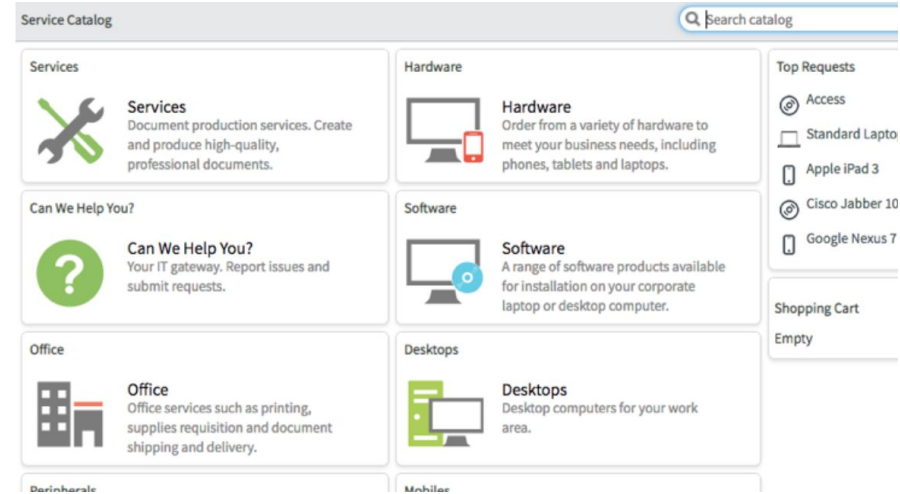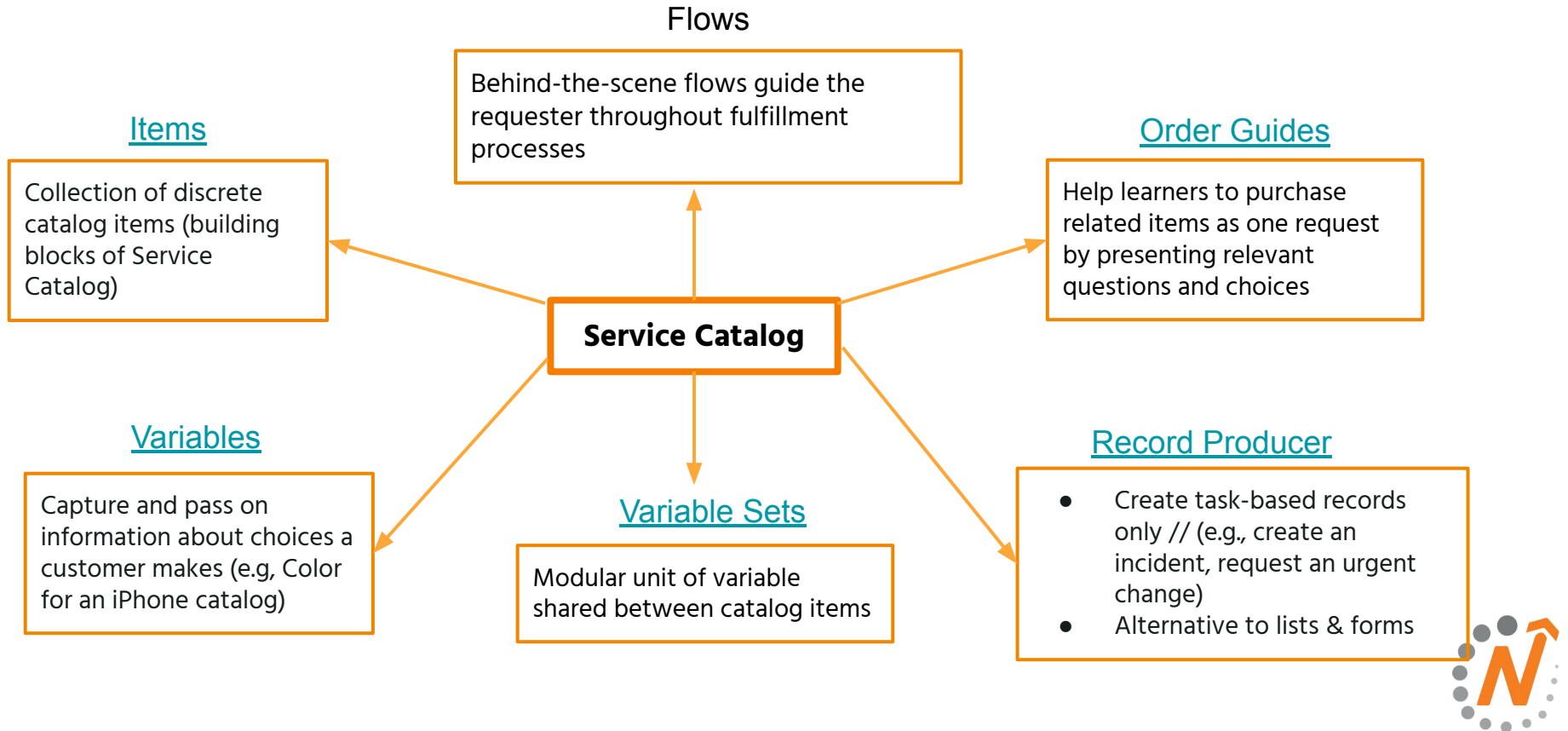- Navigate to: **Self-Service** > **Service Catalog**.

Image Source & Read More: Service Catalog Homepage

What Service Catalog is Composed of

Flows

Behind-the-scene flows guide the requester throughout fulfillment processes

Items

Collection of discrete catalog items (building blocks of Service Catalog)

Order Guides

Help learners to purchase related items as one request by presenting relevant questions and choices

Service Catalog

Variables

Capture and pass on information about choices a customer makes (e.g, Color for an iPhone catalog)

Variable Sets

Modular unit of variable shared between catalog items

Record Producer

- Create task-based records only // (e.g., create an incident, request an urgent change)
- Alternative to lists & forms

Dig Deeper: Service Catalog Items & Variables

To create a new item or modify an existing item: **Service Catalog > Catalog Definitions > Maintain Items**

To create a service catalog variable: Select the catalog item that you want to create a variable for, and then click **New** in the **Variables** related list

Common variable types: Multiple Choice, Multi-line text, Numeric scale, Reference, Select Box, Yes/No

Variables are **global** by default, meaning they are available for all catalog tasks within service catalog workflows or execution plans

To add a variable set: **Service Catalog** > **Catalog Variables** > **Variable Sets**
A variable set includes two fields: **Name & Description**

Dig Deeper: Record Producer

- A specific type of catalog item that enables end users to create **task-based records** from the **service catalog**
- **Record Producers** are presented in categories along with catalog items

(Read More) Record Producer | ServiceNow Documentation

Dig Deeper: Item Request Output

Service Catalog

REQ#

Request [sc_request] table: Request status, a request number is generated

RITM#

Requested Item [sc_req_item] table : within a request, each item is given a specific Requested Item Number (RITM#) (e.g., item ordered, quantity)
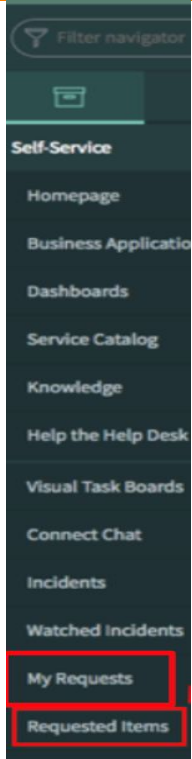
SCTASK#

Catalog Task [sc_task] table: different tasks for an ordered item display to track all the tasks to get the item ready for delivery (e.g., assignment group, due date, work notes)

Progress Stages for a Requested Item

Self-Service > My Request displays *flow stages:*

- Waiting for approval
- Approved
- Pending
- Fulfillment (In progress)
- Deployment/Delivery
- Completed

Image Source & Read More: View Request Status | ServiceNow Documentation

Activity Time!

Complete Lab: [Create a Catalog Item](#)

Active Recall

What do you remember from this module? Draw a mind-map to recall what you have learned

ServiceNow

Flow Design

Learning Objectives

- Describe the benefits and features of Flow Designer to automate the flow of work across the enterprise
- Implement a basic flow

Getting Started with Process Automation

Process Automation applications can help users to turn manual business processes into digitized, automated workflows. These applications include:

- **Flow Designer**: enables process owners to automate **approvals, tasks, notifications, and record operations** without having to code.
    - <u>Do not </u>use if existing logic is already developed using Workflow
    - Use to reduce technical debt and simplify upgrades and deployments
    - Use when integrating with 3rd party systems

- **Process Automation Designer**: enables process wonders to author **cross-enterprise workflows** and create **a single, unified process.**

(Read More) <u>Getting Started with Process Automation | Servicenow Documentation</u>

# Process Automation > Flow Designer (in the application navigator)
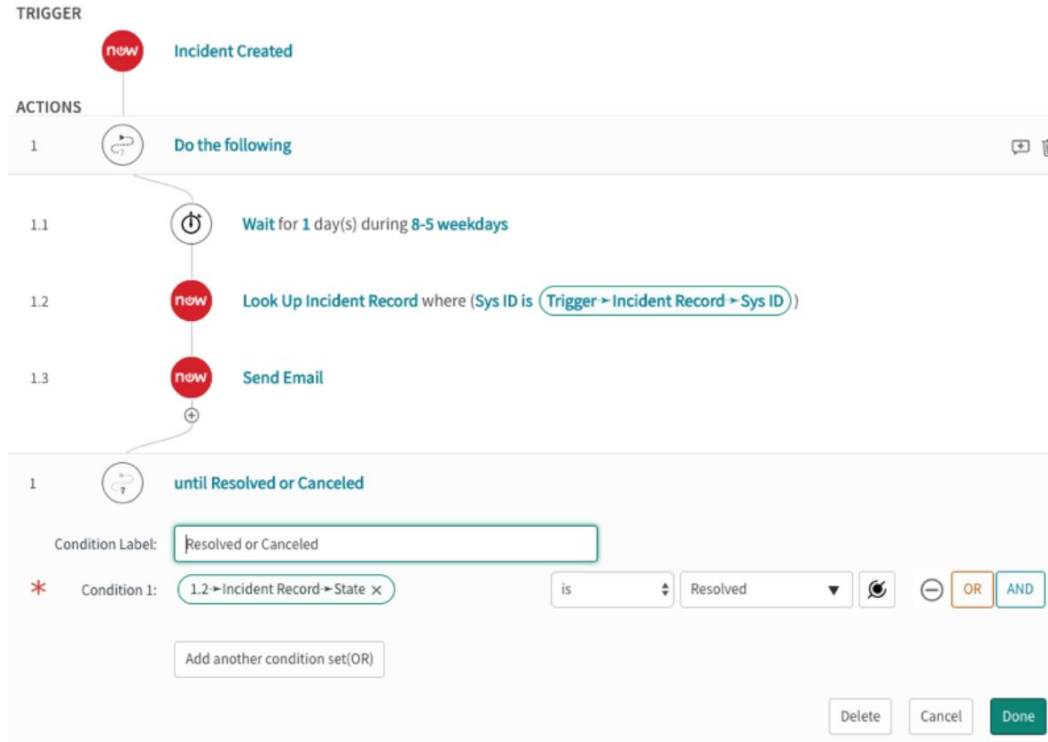
- Non-technical interface / no code / describe a workflow in natural language
- Build multi-step **flows** from reusable components
- Expand the capabilities of Flow Designer with additional subscriptions to Integration Hub
- Examples of Flow Designer Roles
  - flow_designer
  - flow_operator
  - action_designer

Read More: Flow Designer

Flow Component 1 – Triggers
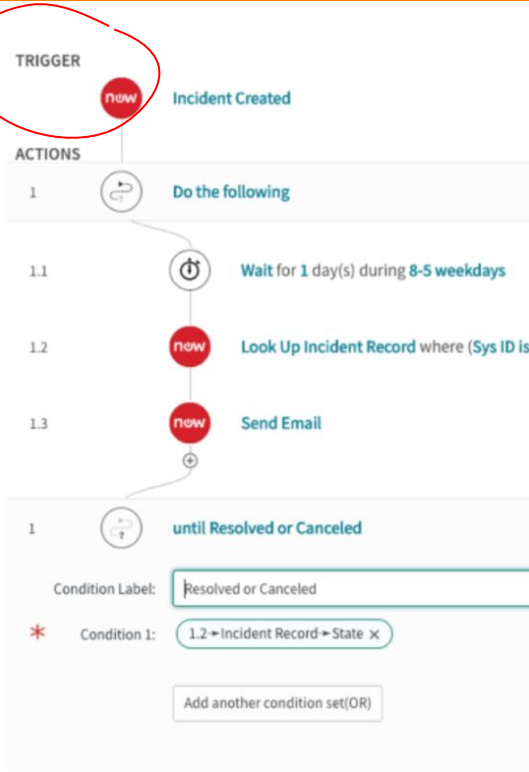
Specifies the conditions that instantiate the flow:

Types of triggers include:

- **Recore triggers**: to start a flow when a record is created or updated
- **Date triggers**: to start a flow after a specific date and time or repeatedly at scheduled intervals (e.g., daily, weekly, monthly)
- **Application triggers**: start a flow when application-specific conditions are met
    - Application-specific content to Flow Designer can be added by installing **spokes.** (e.g., the ITSM Spoke is activated when the Incident, Problem, and Change applications are activated)

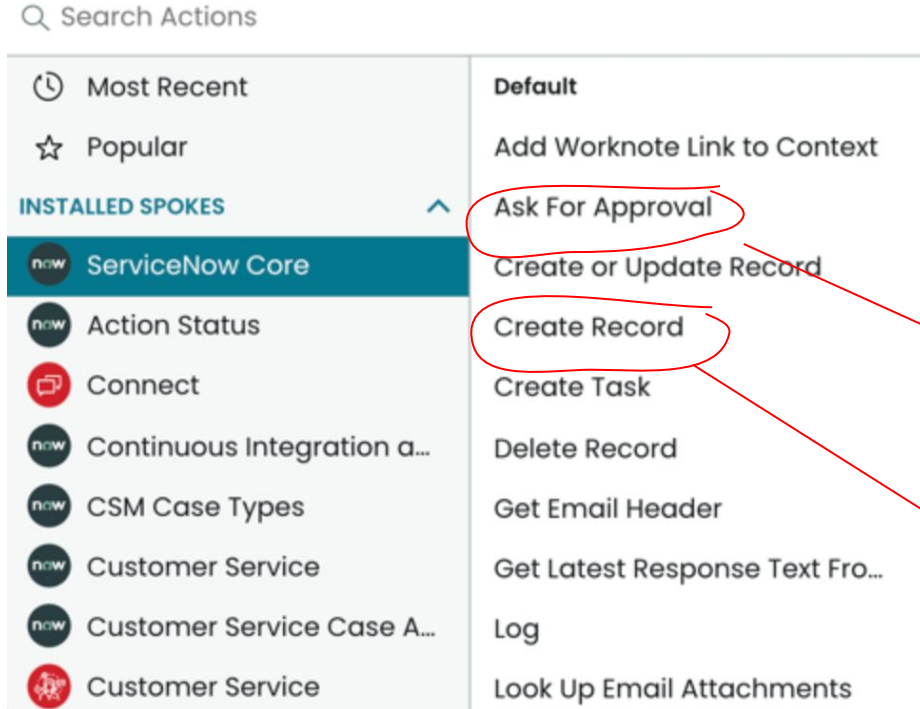(Read More) Flow Trigger Types | ServiceNow Documentation

Trigger & Condition

** Specific conditions can be identified to instantiate a flow

Flow Component 2 : Actions

- Reusable elements that perform specific operations.
- Add an action to a flow by opening the **action picker**
- **Core actions:** pre-designed set of actions available to any flow that cannot be viewed or edited from the Action Designer design environment

Example of core actions: create approvals on any record, including rules for an approval, rejection or cancellation, and a due date

Generate records in a table with particular values when certain conditions occur

Flow Component 3: Data

- Any data gathered or generated in Flow is stored as variables in the **data panel.**
- Each variable has its own **data pill** that can be used as subsequent actions
- Drop and drop data pills from the data section to the appropriate field in the flow

Flow Design Component: Data (cont.)

- Flow designers use **the results of an action as inputs** for other flows, actions, or subflows.
- Flow designers can use the **sequence value** (Trigger 1, 2, 3, etc) in the data pill name to ensure that they are using the correct data pill as an input value.
- When a flow runs an action, it generates the data pill **runtime value**, which remains the same for the duration of the flow. (e. g.,) a data pill for **[Trigger->Incident record]** always contains the incident record values from when the flow *started*

Read More: Flow Designer Data

Process Automation Designer

Enables process owners to (1) author **cross-enterprise workflows** and create a single, unified process, (2) organize Flow Designer content into **unified and digitized cross-enterprise processes.**

- Connect multiple flows and actions
- Reuse existing Flow Designer flows, subflows, or actions to automate process activities
- Guide end users to complete a process in a task-oriented interface
- Consolidate separate business processes across the organization
- Define a consistent record life cycle from creation to completion
- Pass data between the activities and stages of a business process
- Specify the conditions and the order in which activities and stages run
- Visualize and manage the activities and stages of your process

Read More: Process Automation Designer

Activity Time!

Complete Lab: Create a Flow Designer Flow

Active Recall

What do you remember from this module? Draw a mind-map to recall what you have learned

Virtual Agent
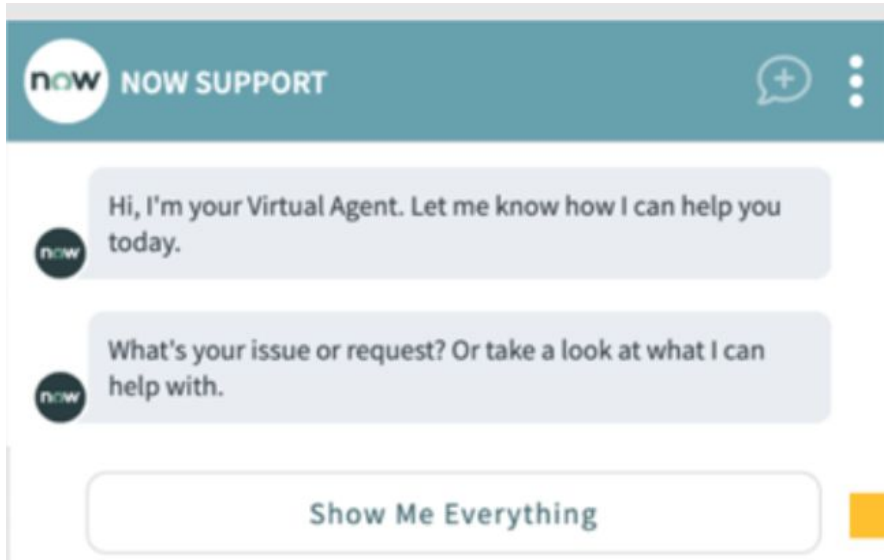
Virtual Agent: Conversation Platform

Image Source & Read More: Virtual Agent| ServiceNow Documentation

Virtual Agent helps solve general issues (typical "Tier 2 support") 24/7 so that your agents can focus on more complex user issues.

Personalized Customer Support experience such as:

- Answering FAQs
- Providing tutorial
- Updating records (e.g., status on cases or incidents)
- Gathering data for the live agent
- Performing diagnostics
- Resolving multi-step problems

Web-based interface on Service Portal, phones & even support 3rd-party messaging apps (such as Slack)

Active Recall

What do you remember from this module? Draw a mind-map to recall what you have learned