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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Forms Overview

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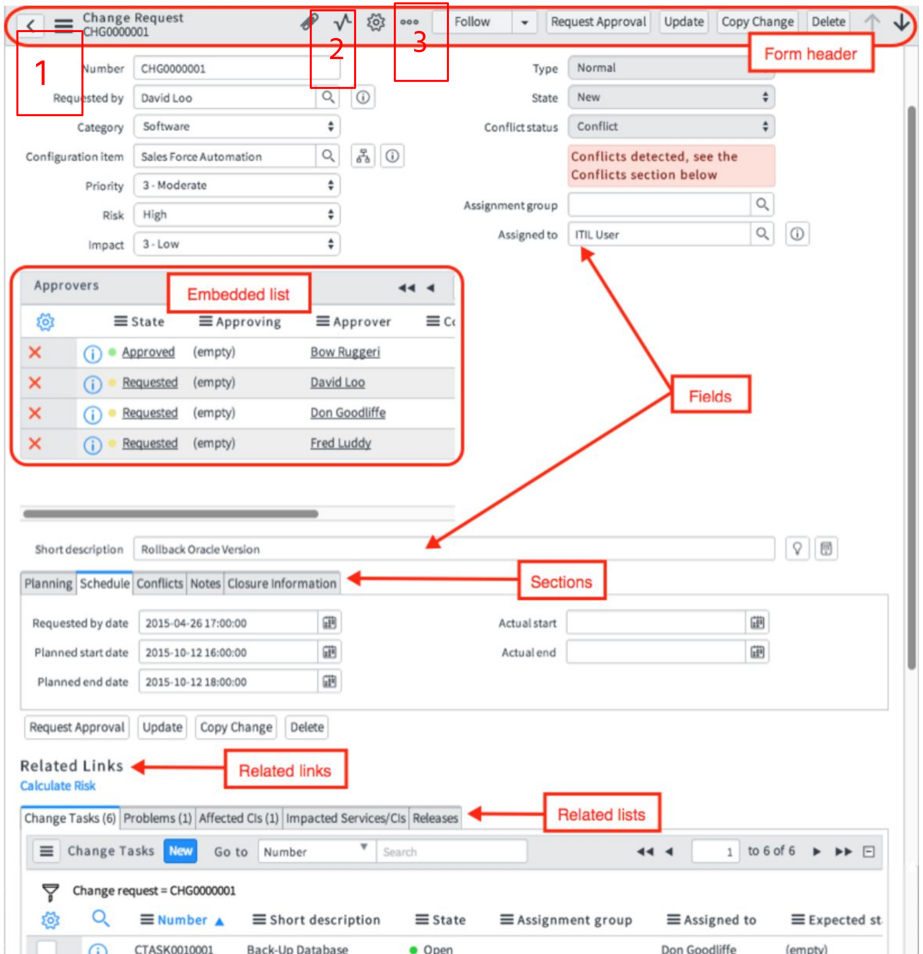
Learning Objectives

- Identify the components of the form user interface
- Adopt forms to your needs using form personalization
- Create forms using the form designer

Form - display fields from one record



Form header includes:

1. Form Context Menu - options related viewing & filtering form data
2. Activity Stream
3. More Options

Field Types include:

- Reference: Query that displays records from another table.
- String: A single line text field for 254 characters or less
- Multi-line text box: for characters 255 or more
- True / false: boolean field in a check box

Image Source & Read More: Forms | ServiceNow Documentation

Formatter

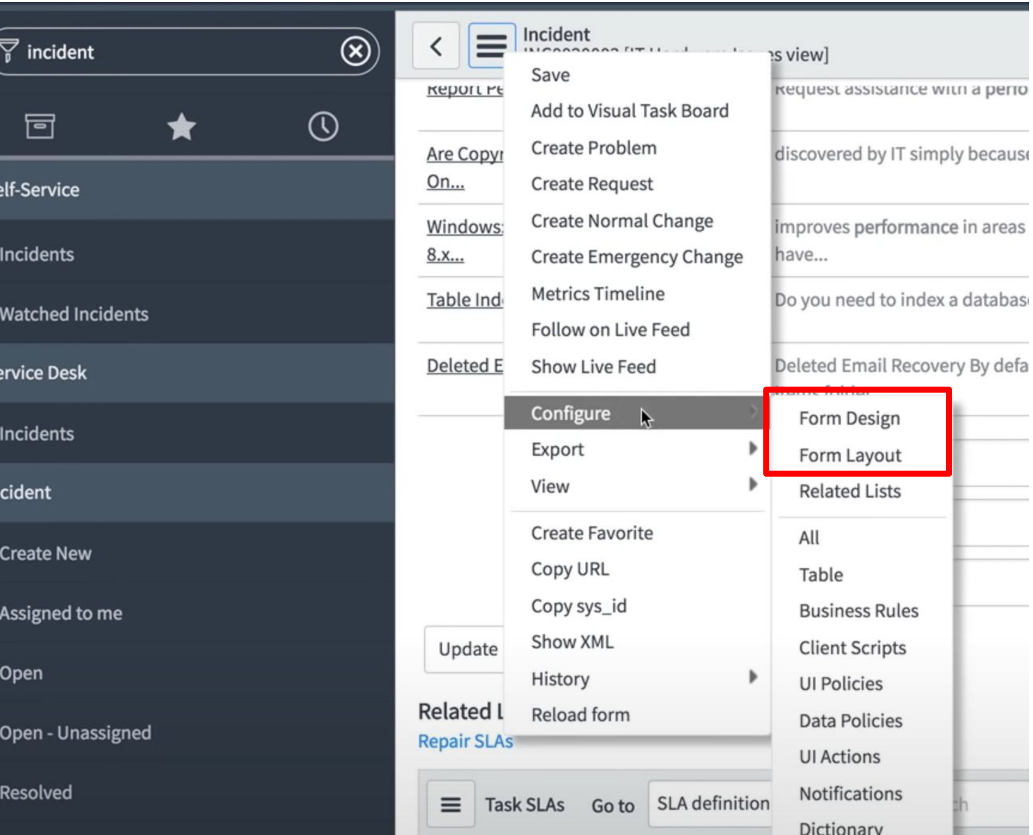
A form element displays information that is **not** a field in the record.

Examples of formatters:

- Activity formatter ( in Activity Stream)
- Process flow formatter
- Parent breadcrumbs formatter
- Approval summarizer formatter
- CI relations formatter

For details, read more: [Formatter | ServiceNow Documentation]

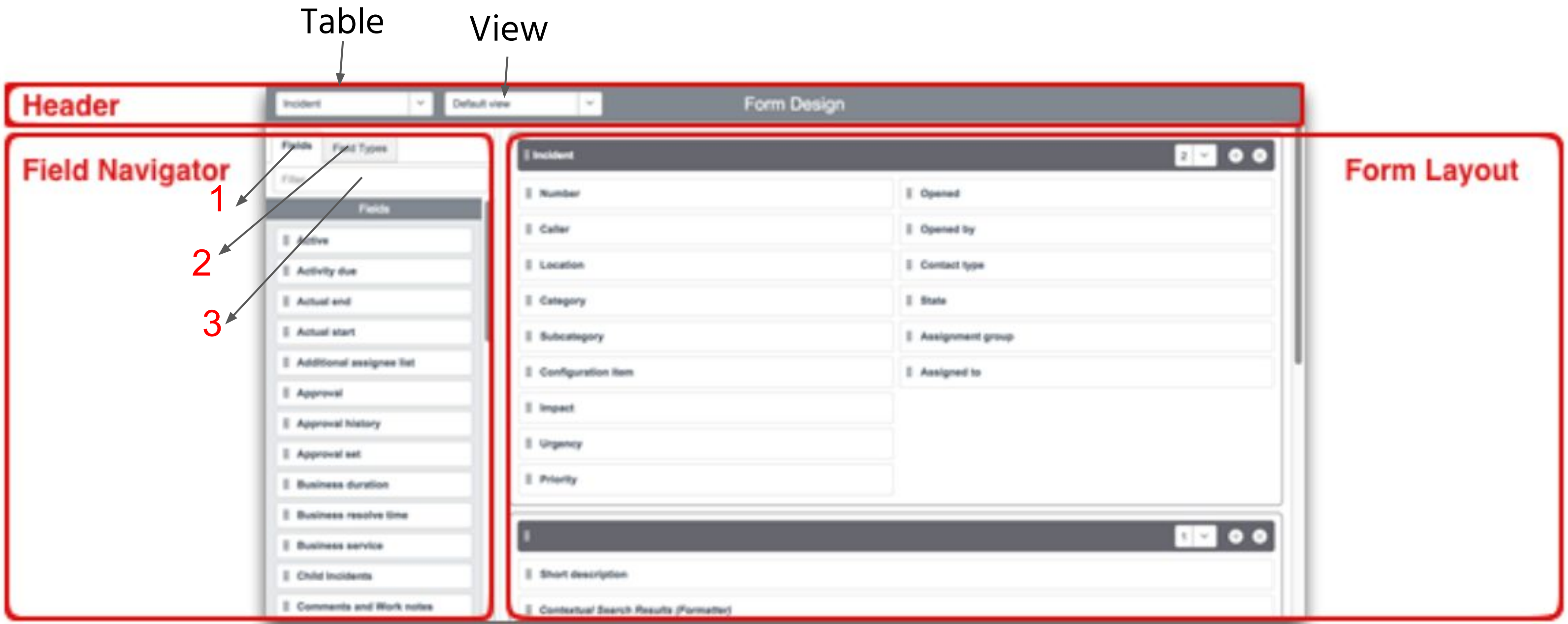
Form Design and Layout (for all users)



- Change the order/location of fields
- Add fields
- Configure field properties

Image Source & Read More: Forms | ServiceNow Documentation

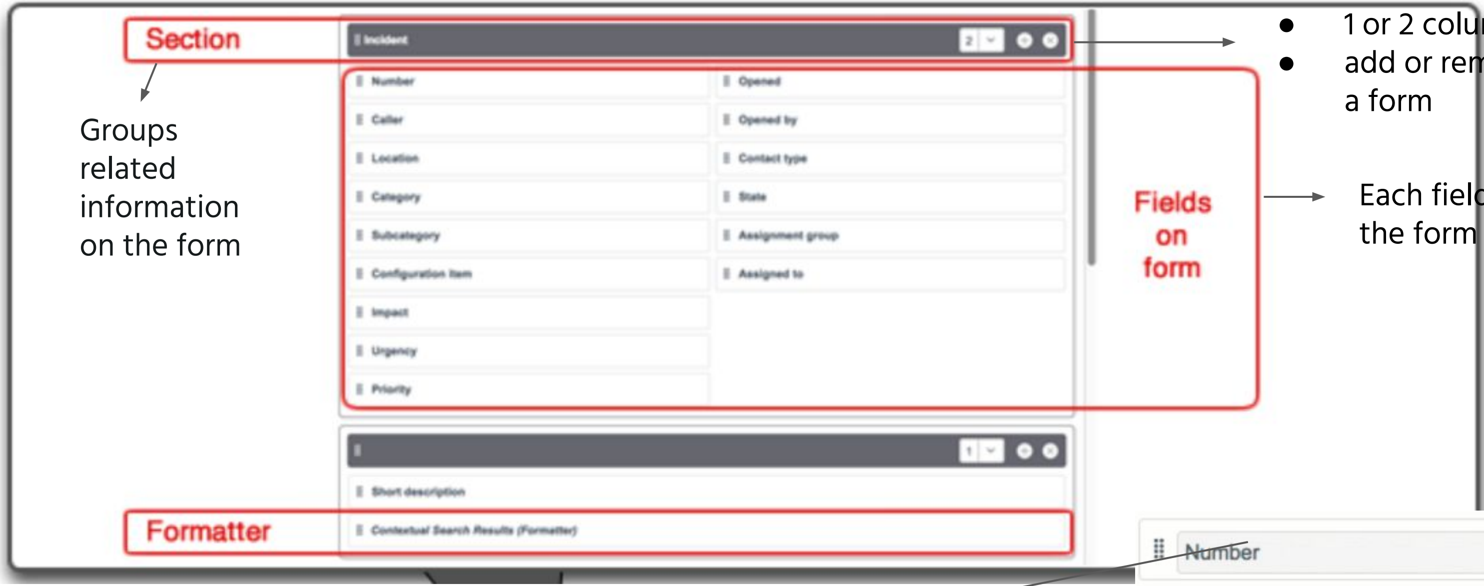
Form Design Interface



1. Fields - displays a list of existing fields that can be added to the form
2. Field Types - displays a list of existing field types that can be added to the form
3. Filter - allows text search

*When navigating to Form Design, it opens in a separate tab (Image Source & Read More: [Using the Form Designer | ServiceNow Documentation]

Form Layout : Sections & Fields



Groups related information on the form

- 1 or 2 columns
- add or remove from a form

Each field represent a cell on the form

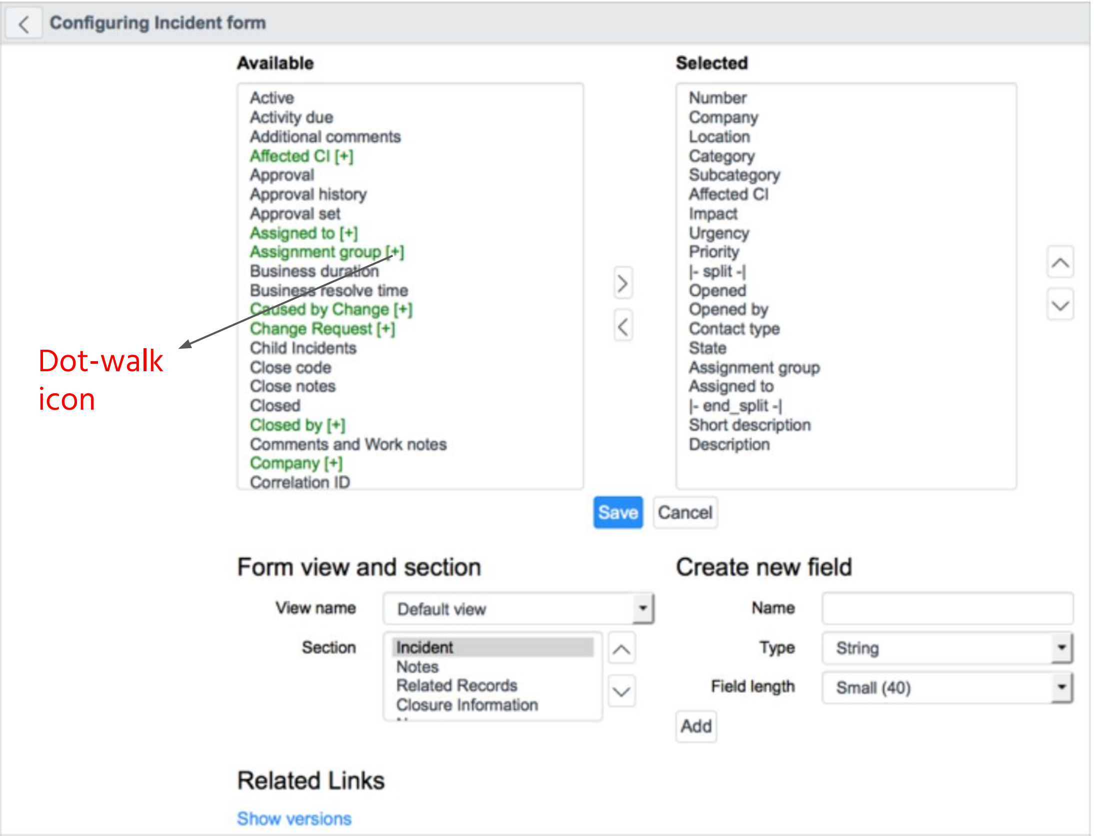
Settings

Image: [Using the Form Design]

Handle icon: move fields around

Field label: ready-only to identify the field

Configuring Forms

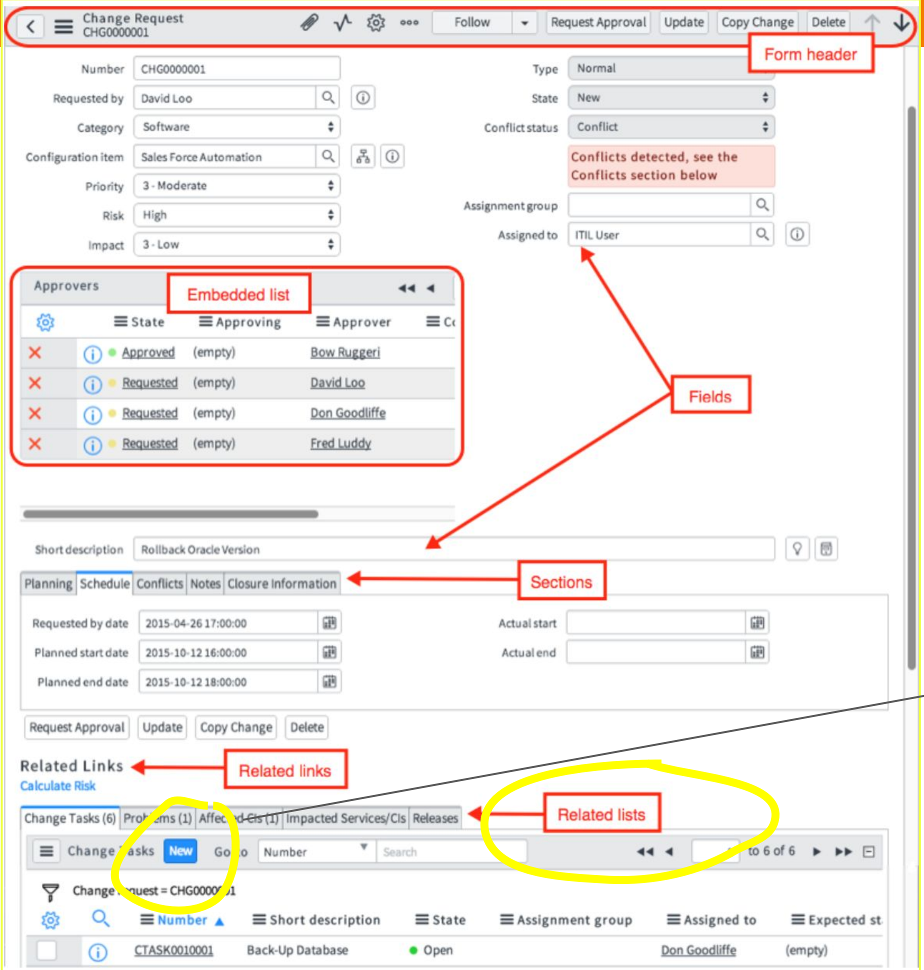


Dot-walk icon

Warning: it is not recommended to add the same field to more than one section of a form unless the field displays read-only data. Having two or more instances of an editable field can cause data loss and improper functioning of data

Image Source & Read More: [Configuring the Form Layout](#) | ServiceNow Documentation

Related Lists



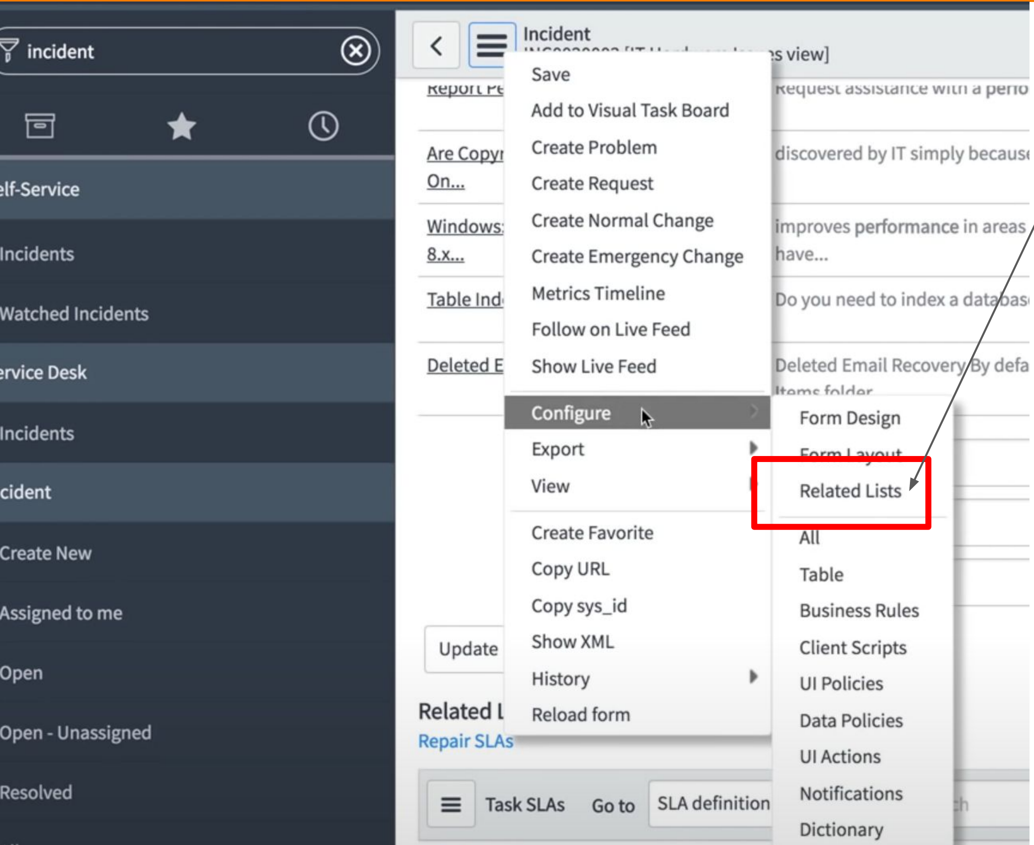
Related lists display records in another table that are associated with the current record.

They are presented at the bottom of the form view

Create a new record

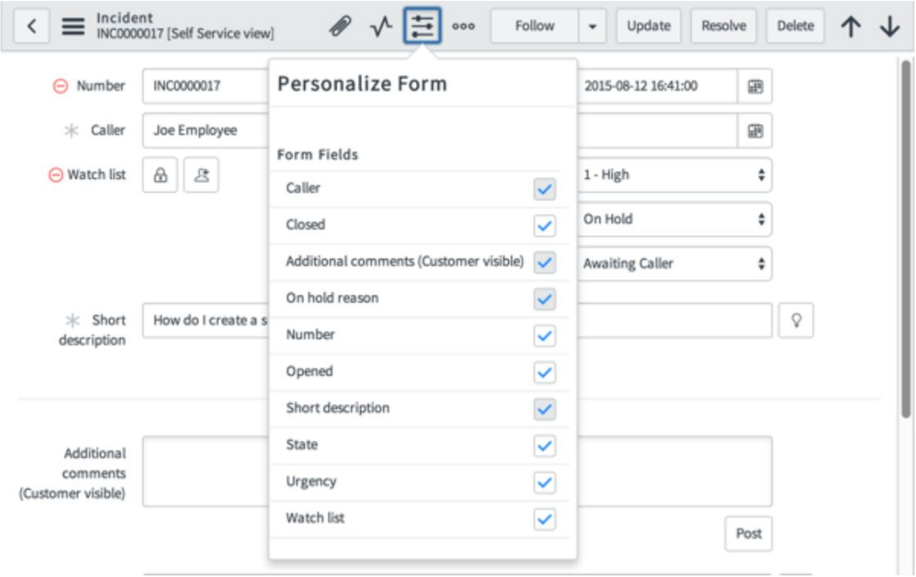
Read more: [Related Lists | ServiceNow Documentation]

Add, Move, Remove Related Lists



Related lists can be added, moved, or removed on the form view

Personalize a Form



- A cleared gray check-box: fields that you previously hid.
- Only the fields that are configured are displayed in the Personalize Form menu. Adding fields to the form needs to be configured in Configure Form Layout

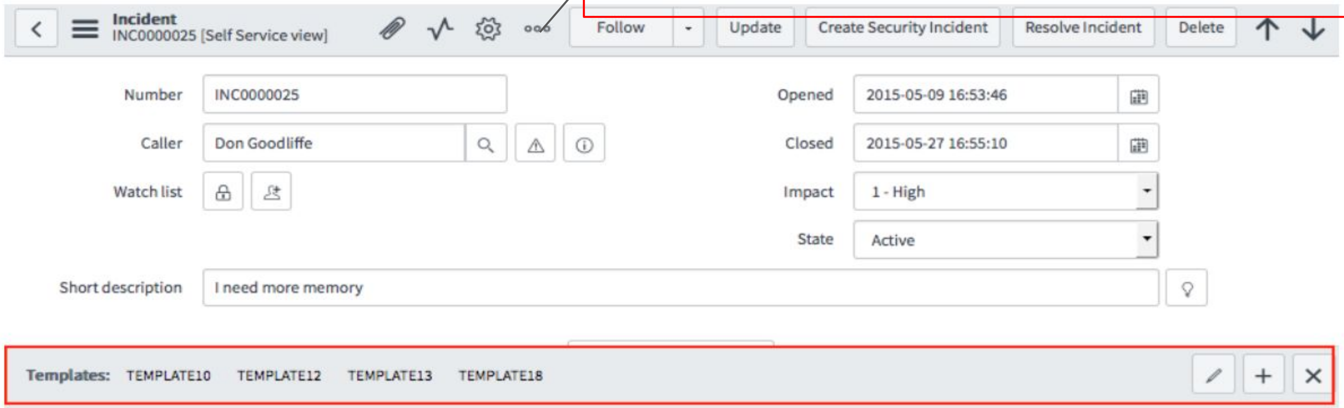
Image Source & Read More: [Personalize a form | Servicenow Documentation]()

Templates

Use templates to populate fields automatically and simplify the process of submitting new records:

- Populate the most-used fields & save it as a template for users to use
- Creating too many templates for each form may makes them cumbersome to manage
- Template creation needs to be restricted to select groups since a template can allow users to by-pass some mandatory fields (Read more about [Form Templates | ServiceNow Documentation]

Click More options -Select " Toggle Template Bar"

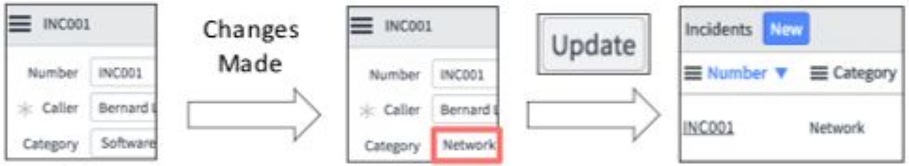


[Image Source]: Toggle the template bar

Add or Update Records

Click Submit to insert a record on a new form and return to the previous page.

Click Update to save changes on existing record and to return to the previous page.



Click on the Form Context menu in the upper left header bar, then click Save to save changes to the form without exiting the form.

Lab : Form Configuration

Complete (Lab) Form Configuration

Active Recall

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

Task Management

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Learning Objectives

- Use tasks to handle repeatable processes across the enterprise
- Collaborate on tasks with user presence, comments, activity stream, and Connect Chat
- Manage tasks by creating Visual Task Boards

Deep Dive into Tasks in ServiceNow

- **Task** – any record that is assigned or completed by a user, created from the Task table
- **Task [task] table:** one of the core tables that provides a series of standard fields
- All work to be done (e.g., [incident], [problem], [change_request]) is handled through tasks, and moved to a closed state

Read Driving Tasks on ServiceNow Documentation to understand how a table textends tasks)

- Approvals
- Assignments
- Service levels
- Inactive Monitors
- Workflow

Task Assignment & Assignment Rules

A user that belongs to a group inherits that group's roles, so to manage roles & assign tasks, follow the sequence below:

(1) add users to groups
(2) apply roles to groups
(3) assign tasks to groups
(4) assign tasks to users

(Discuss) [Assignment Rules]

- The task record has been created or updated, but unassigned (no existing value for **assigned_to** or **assignment_group**
- The assignment rule is the first rule that matches the table and conditions

Assign Rules: System Policy > **Rules** > **Assignment** and click **New.**

Determines when the rule will be applied

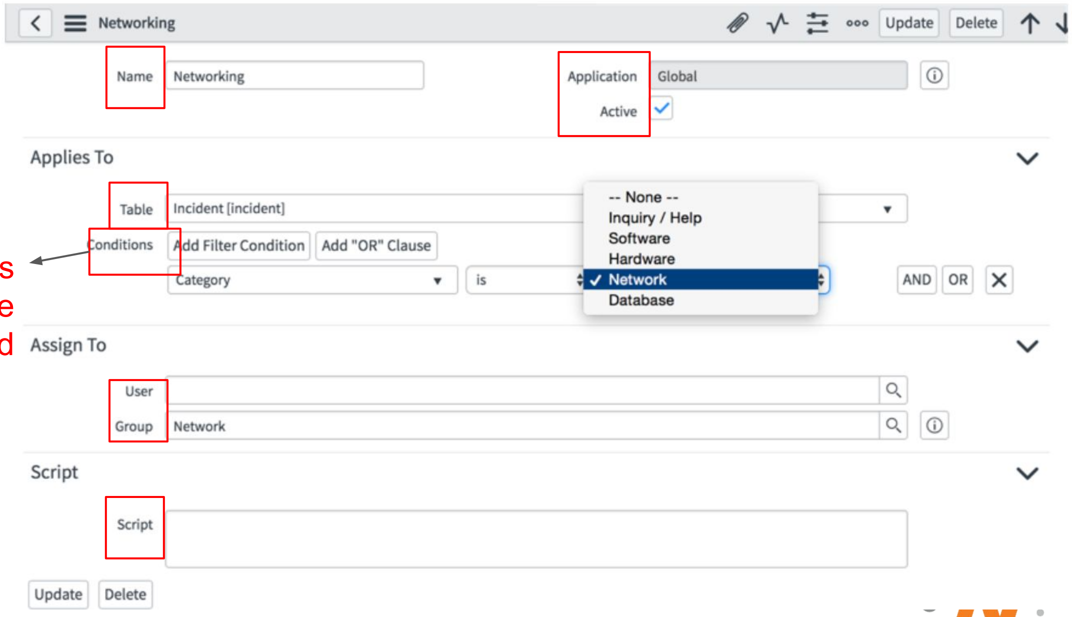
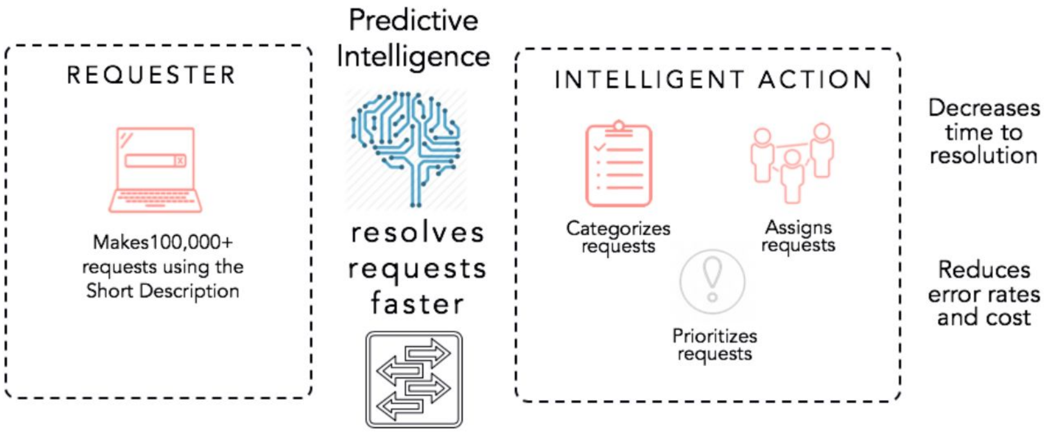


Image Source & Read More: [Create an Assignment Rule | ServiceNow Documentation]

Set Predictive Intelligence to Resolve Requests Faster



Predictive Intelligence uses machine-learning algorithms to set field values during record creation to reduce

- Task resolution times.
- The number of interactions required to resolve tasks.
- The error rates of categorizing and assigning work.

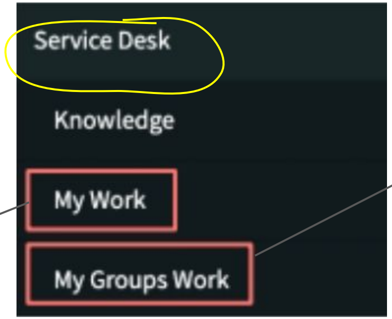
Required roles: admin or ml_admin

Image Source & Read More: [Predictive Intelligence](#)| ServiceNow Documentation

Accessing Tasks: My Work/ My Groups Work

The **Service Desk application** provide basic set of Service Desk functions

Role: **itil** role

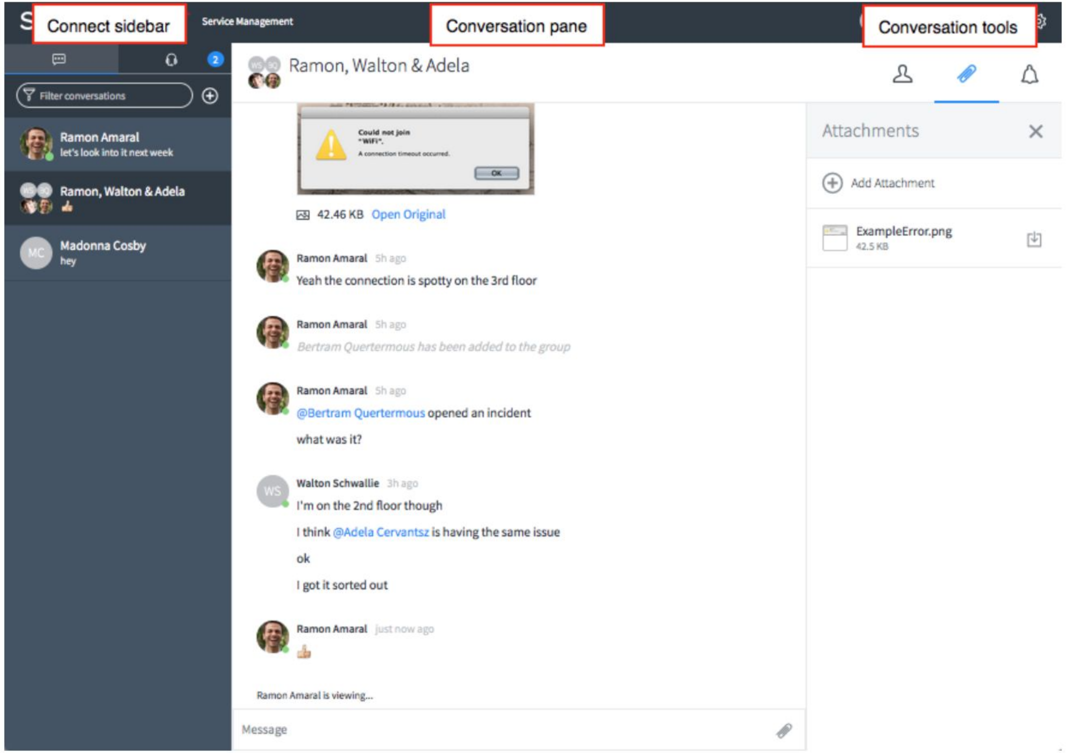


Outstanding work for your group: active tasks assigned to your group, but not yet to an individual

Your outstanding work:
Active tasks assigned to you including change request, group approval, incident, knowledge base submission, etc

Read More: [Service Desk | ServiceNow Documentation]

Connect Chat & Connect Workspace for Collaboration



Connect Workspace - a full screen view of your Connect Chat & Connect Support conversations + additional tools

Image Source & Read More: [Connect Workspace | ServiceNow Documentation]()

User Presence

User Presence provides visibility for who is online when you are working in an instance and facilitates collaboration in real-time

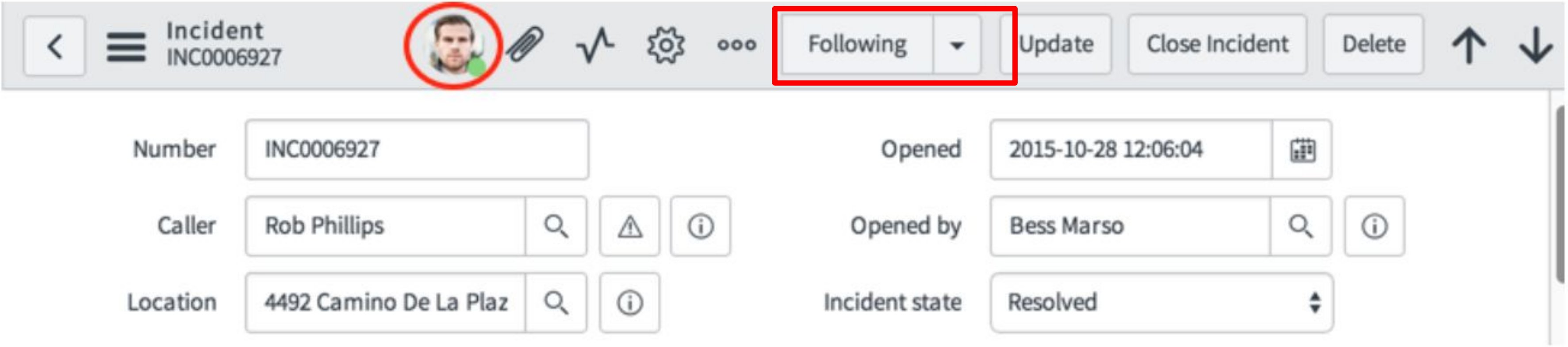
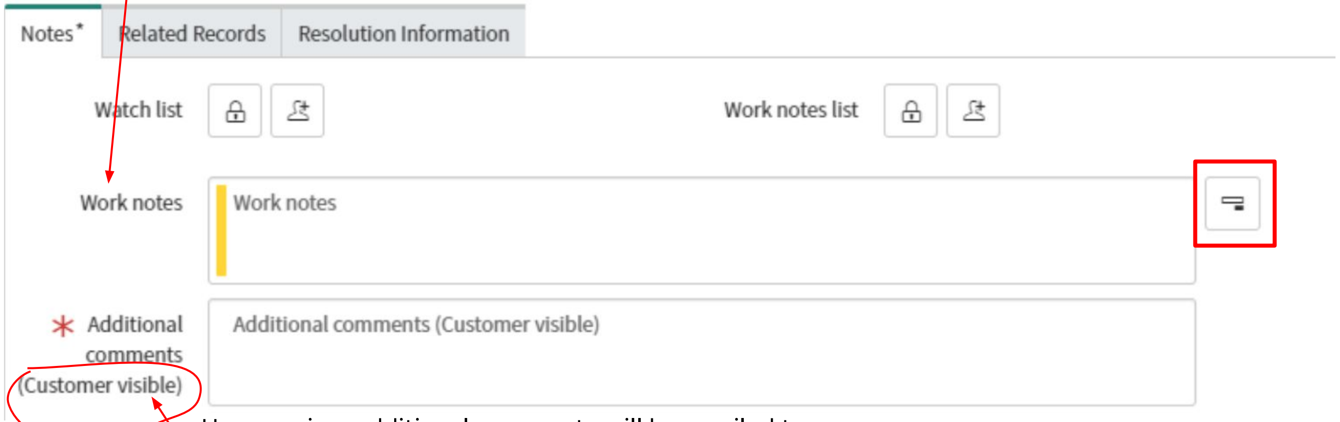


Image Source & Read More: [User Presence | ServiceNow Documentation]()

Notes Tab: Work Notes & Additional Comments

Communicate with stakeholders and document task activities throughout the lifecycle for internal and external audiences

Only visible to those working on the task - fully document work notes for knowledge management and continuity in the task management process

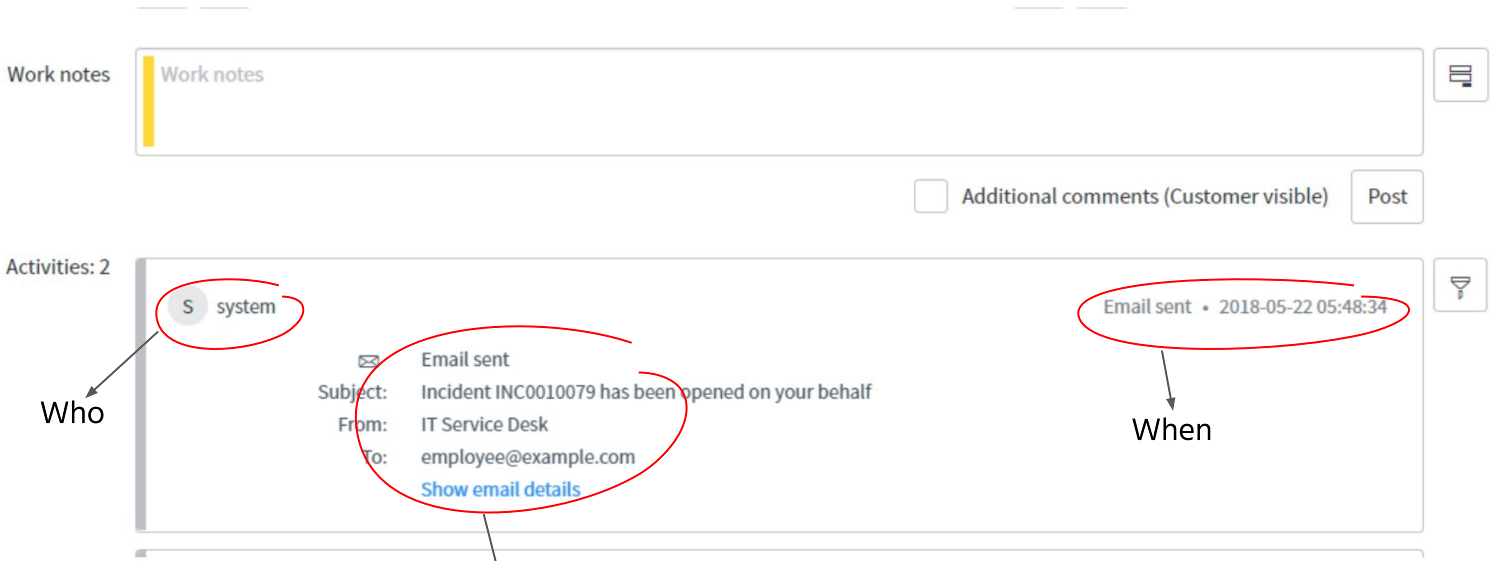


Upon saving, additional comments will be emailed to the requester

Reference: ServiceNow Fundamentals @ Now Learning

Notes Tab: Activity

A complete history of a read-only record



Who

When

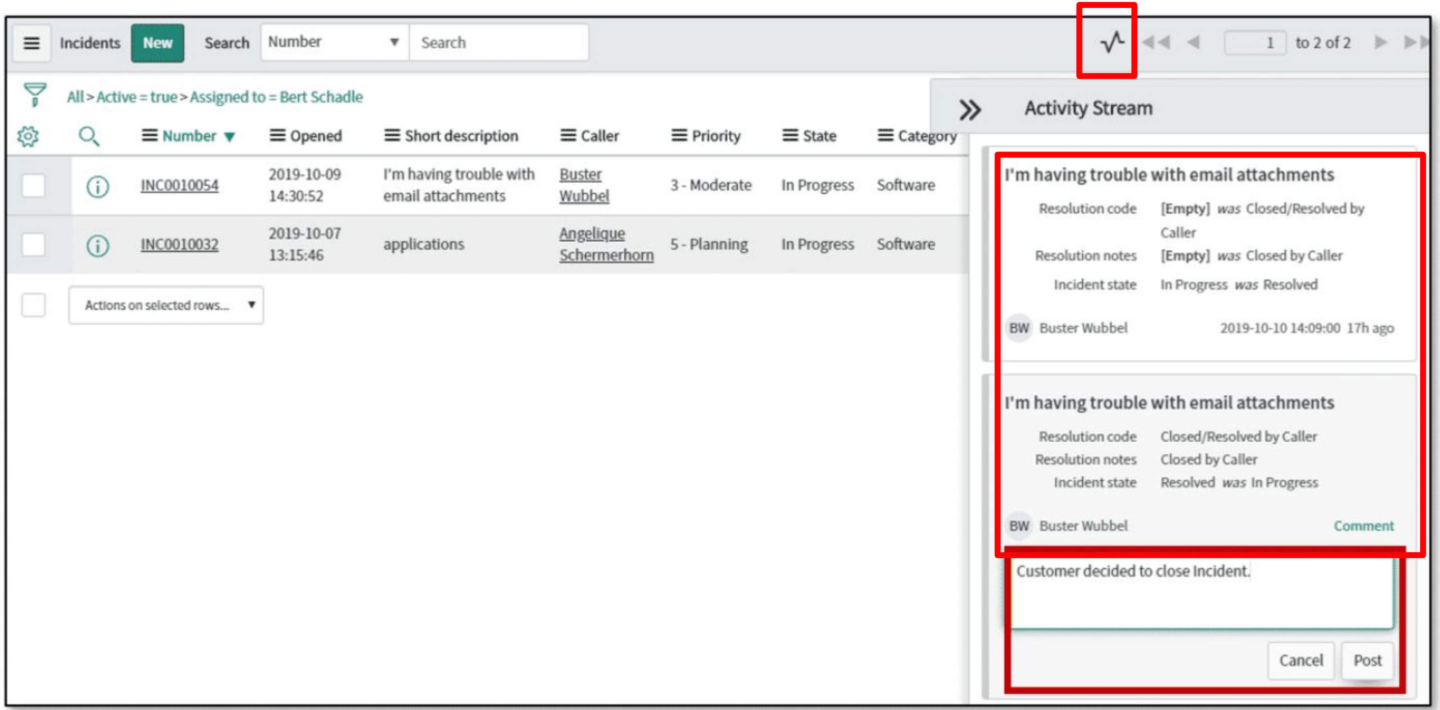
What

Reference: ServiceNow Fundamentals @ Now Learning

Activity Stream Inline Editing

Update multiple active records without having to open a form interface

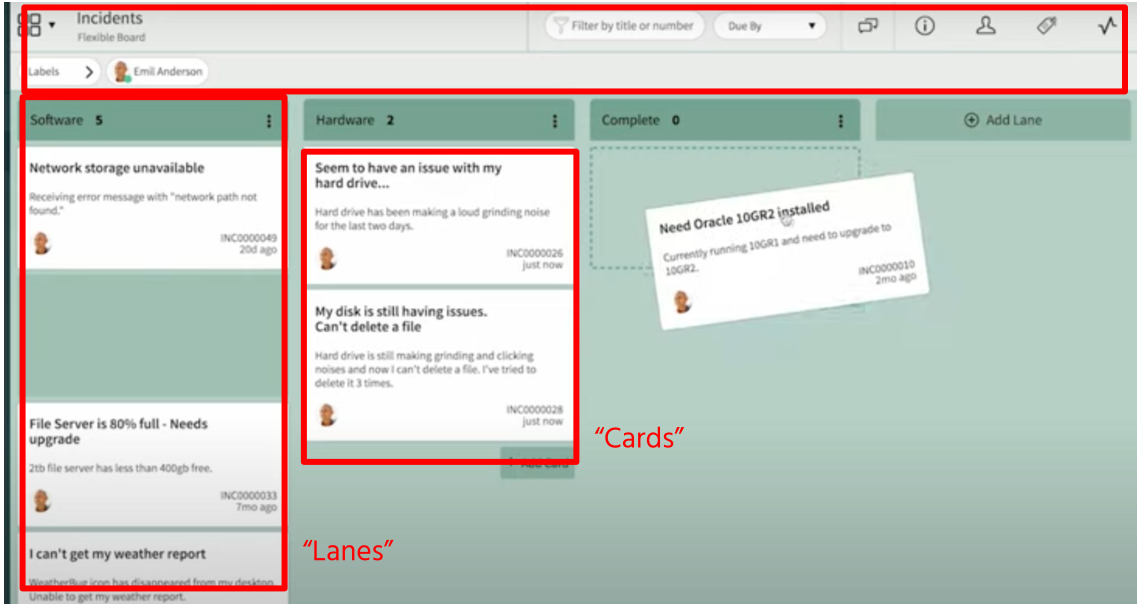
1. Show activity stream in a flyout window



2. Open a record

3. Enter your comment

Visual Task Boards



Self-Service > Visual Task Boards

- View and update multiple task records ("cards")
- Identify process bottlenecks

Image source & Read More: Visual Task Boards [| ServiceNow Documentation] (Read more)

Lab : Form Configuration

Complete (Lab) Task Management

Exit Quiz

- The field type that displays as a check box on the form is:
- The field type that displays information from another table is:
- The Form Design interface is consisted of three main components. What are they?
- What allows fields to be auto-populated when applied?
- The tab contains the activity stream for a task
- Describe the difference between Work Notes and Additional Comments
    - Work notes - visible to only those who can view the task
    - Additional comments - visible to the customer / requester

Active Recall

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