

ServiceNow Fundamentals Study Guide

- This study guide is designed to provide key concepts of ServiceNow Fundamentals and direct you to the official 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

Forms Overview

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

The screenshot shows a ServiceNow Change Request form for record CHG0000001. Red boxes and arrows highlight key components:

- Form header:** The top navigation bar containing buttons like 'Follow', 'Request Approval', 'Update', 'Copy Change', and 'Delete'.
- Form Context Menu:** A menu icon (three dots) in the top left corner.
- Activity Stream:** A section showing a timeline of activities related to the record.
- More Options:** A button (plus icon) in the top left corner.
- Fields:** Individual input fields for 'Number', 'Requested by', 'Category', 'Configuration item', 'Priority', 'Risk', 'Impact', 'Type', 'State', 'Conflict status', 'Assignment group', and 'Assigned to'.
- Sections:** A tabbed interface with sections like 'Planning', 'Schedule', 'Conflicts', 'Notes', and 'Closure Information'.
- Related links:** A section titled 'Related Links' with a link to 'Calculate Risk'.
- Related lists:** A section titled 'Related Lists' with links to 'Change Tasks', 'Problems', 'Affected CIs', 'Impacted Services/CIs', and 'Releases'.
- Embedded list:** A table titled 'Approvers' showing a list of users and their approval status.

State	Approving	Approver
Approved	(empty)	Bow Ruggeri
Requested	(empty)	David Loo
Requested	(empty)	Don Goodliffe
Requested	(empty)	Fred Luddy

Field	Value
Number	CHG0000001
Requested by	David Loo
Category	Software
Configuration item	Sales Force Automation
Priority	3 - Moderate
Risk	High
Impact	3 - Low
Type	Normal
State	New
Conflict status	Conflict
Assignment group	
Assigned to	ITIL User

Field	Value
Requested by date	2015-04-26 17:00:00
Planned start date	2015-10-12 16:00:00
Planned end date	2015-10-12 18:00:00
Actual start	
Actual end	

Link	Count
Change Tasks	6
Problems	1
Affected CIs	1
Impacted Services/CIs	
Releases	

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.

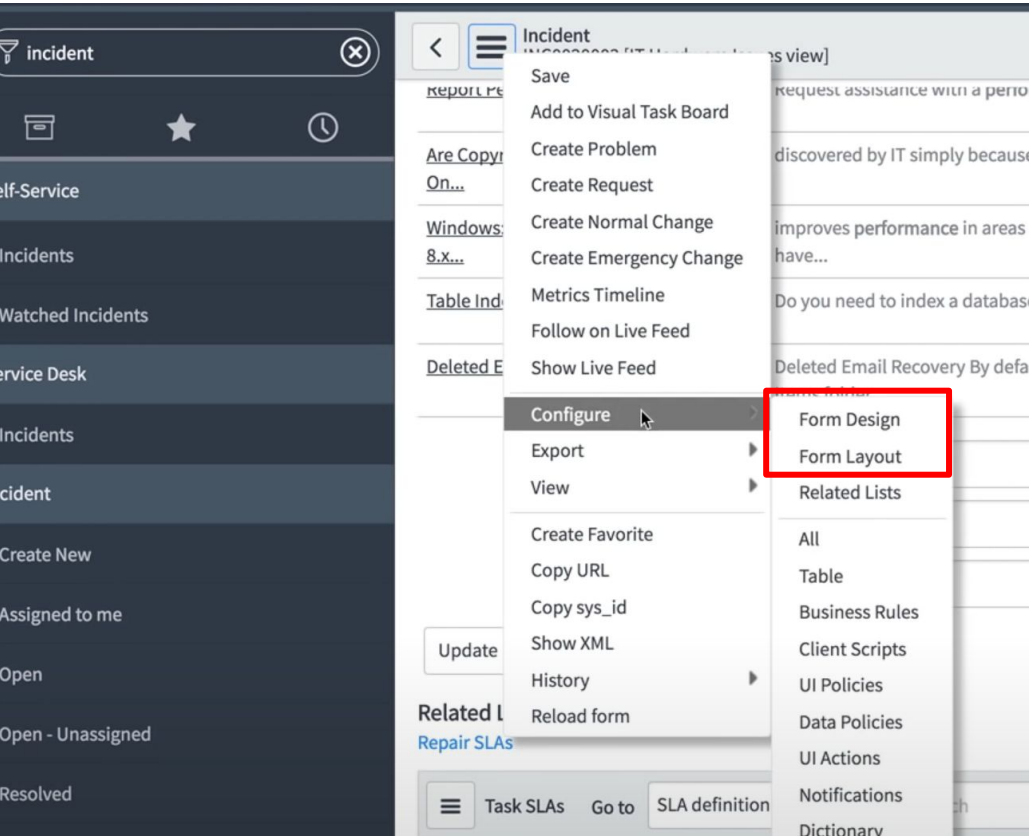
Examples of formatters:

- 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)

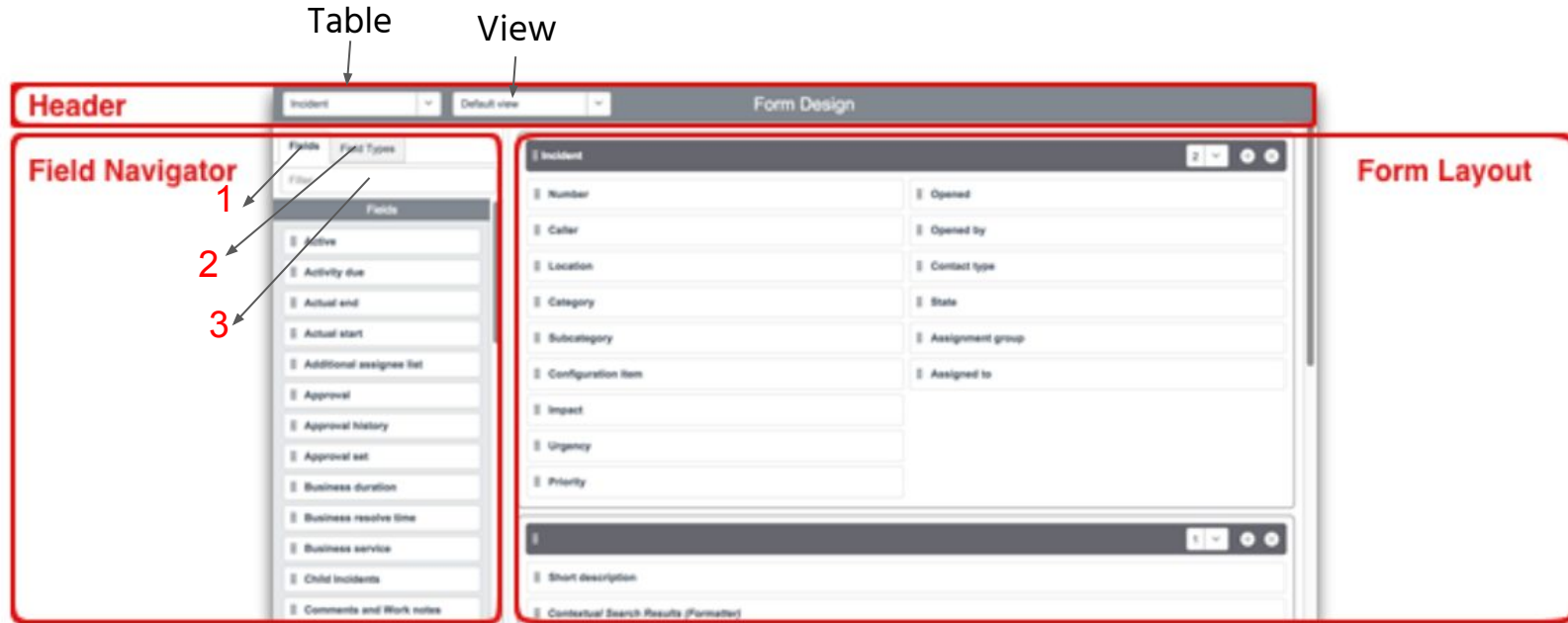


- Change the order/location of fields
- Add fields
- Configure field properties

[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

The diagram illustrates a form layout with the following components:

- Section:** Groups related information on the form. It is highlighted with a red box and labeled "Section".
- Fields on form:** Each field represents a cell on the form. It is highlighted with a red box and labeled "Fields on form".
- Formatter:** A section at the bottom of the form, highlighted with a red box and labeled "Formatter".
- Settings:** A panel on the right side of the form, labeled "Settings", which contains a list of fields with their respective settings and a close button.

The form layout is divided into two main sections: "Incident" and "Short description". The "Incident" section contains fields for Number, Caller, Location, Category, Subcategory, Configuration item, Impact, Urgency, Priority, Opened, Opened by, Contact type, State, Assignment group, and Assigned to. The "Short description" section contains fields for Short description and Contextual Search Results (Formatter).

Annotations and details:

- Handle icon:** move fields around (indicated by a red box around the handle icon).
- Field label:** ready-only to identify the field (indicated by a red box around the field label).
- Settings:** A panel on the right side of the form, labeled "Settings", which contains a list of fields with their respective settings and a close button.

Image: [Using the Form Design](#)

Configuring Forms

< Configuring Incident form

Available

- Active
- Activity due
- Additional comments
- Affected CI [+]
- Approval
- Approval history
- Approval set
- Assigned to [+]
- Assignment group [+]
- Business duration
- Business resolve time
- Caused by Change [+]
- Change Request [+]
- Child Incidents
- Close code
- Close notes
- Closed
- Closed by [+]
- Comments and Work notes
- Company [+]
- Correlation ID

Selected

- Number
- Company
- Location
- Category
- Subcategory
- Affected CI
- Impact
- Urgency
- Priority
- [- split -]
- Opened
- Opened by
- Contact type
- State
- Assignment group
- Assigned to
- [- end_split -]
- Short description
- Description

Dot-walk icon

Save Cancel

Form view and section

View name: Default view

Section: Incident

Create new field

Name:

Type: String

Field length: Small (40)

Add

Related Links

Show versions

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](#)



The screenshot shows a ServiceNow Change Request form for 'CHG0000001'. The form is divided into several sections, with red and yellow annotations highlighting specific features:

- Form header:** The top section of the form, containing the title 'Change Request' and the ID 'CHG0000001'.
- Fields:** Individual input fields for 'Number', 'Requested by', 'Category', 'Configuration item', 'Priority', 'Risk', 'Impact', 'Type', 'State', 'Conflict status', 'Assignment group', and 'Assigned to'.
- Embedded list:** A table titled 'Approvers' located in the middle-left section, showing a list of users and their approval status.
- Sections:** A horizontal tab bar at the bottom of the main form area, with tabs for 'Planning', 'Schedule', 'Conflicts', 'Notes', and 'Closure Information'.
- Related links:** A section at the bottom left with a 'Calculate Risk' link.
- Related lists:** A section at the bottom right, highlighted with a yellow circle, showing a list of related records (Change Tasks) with a 'New' button to create a new record.

Add, Move, Remove Related Lists

The screenshot displays a software interface for managing incidents. On the left is a dark sidebar with navigation items like 'incident', 'Self-Service', 'Incidents', 'Watched Incidents', 'Service Desk', and 'Create New'. The main area shows the 'Incident' form view. A context menu is open over the form, listing actions such as 'Save', 'Add to Visual Task Board', 'Create Problem', 'Create Request', 'Create Normal Change', 'Create Emergency Change', 'Metrics Timeline', 'Follow on Live Feed', 'Show Live Feed', 'Configure', 'Export', 'View', 'Create Favorite', 'Copy URL', 'Copy sys_id', 'Show XML', 'History', and 'Reload form'. The 'Configure' option is selected, and a sub-menu is visible with 'Form Design', 'Form Layout', and 'Related Lists'. The 'Related Lists' option is highlighted with a red rectangle. Below the menu, the 'Related Lists' section is partially visible, showing 'Repair SLAs'.

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



Personalize a Form

The screenshot shows the 'Personalize Form' menu for an incident record (INC0000017). The menu is open, displaying a list of form fields with checkboxes indicating their visibility status. The fields listed are: Caller, Closed, Additional comments (Customer visible), On hold reason, Number, Opened, Short description, State, Urgency, and Watch list. All these fields have their checkboxes checked. The background shows the incident form with fields for Number, Caller, Watch list, Short description, and Additional comments. The 'Post' button is visible at the bottom right of the form.

Form Fields	Checked
Caller	<input checked="" type="checkbox"/>
Closed	<input checked="" type="checkbox"/>
Additional comments (Customer visible)	<input checked="" type="checkbox"/>
On hold reason	<input checked="" type="checkbox"/>
Number	<input checked="" type="checkbox"/>
Opened	<input checked="" type="checkbox"/>
Short description	<input checked="" type="checkbox"/>
State	<input checked="" type="checkbox"/>
Urgency	<input checked="" type="checkbox"/>
Watch list	<input checked="" type="checkbox"/>

- 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](#)

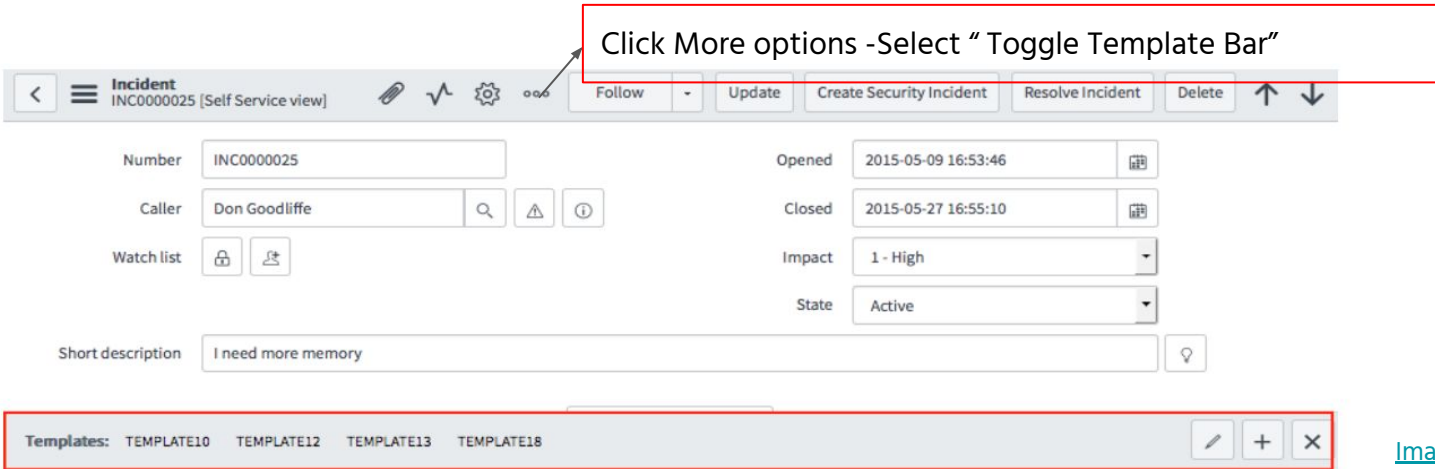


Templates

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"



The screenshot displays a ServiceNow incident form for 'INC0000025 [Self Service view]'. The form includes fields for Number, Caller, Watch list, Short description, and various status fields like Opened, Closed, Impact, and State. At the bottom, a 'Templates' bar is visible, containing links to TEMPLATE10, TEMPLATE12, TEMPLATE13, and TEMPLATE18. A red box highlights this bar, and an arrow points to it from the text 'Click More options -Select "Toggle Template Bar"'. The bar also includes edit, add, and delete icons.

Incident INC0000025 [Self Service view]

Follow Update Create Security Incident Resolve Incident Delete

Number INC0000025

Caller Don Goodliffe

Watch list

Short description I need more memory

Opened 2015-05-09 16:53:46

Closed 2015-05-27 16:55:10

Impact 1 - High

State Active

Templates: TEMPLATE10 TEMPLATE12 TEMPLATE13 TEMPLATE18

[Image Source:](#) Toggle the template bar

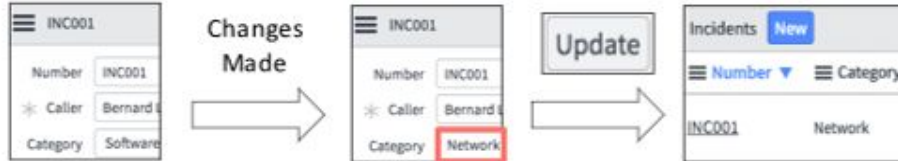


Add or Update Records

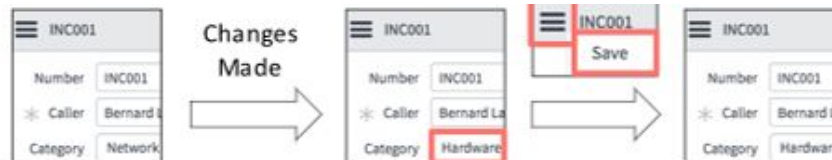
Click Submit to insert a record on a new form and return to the previous page.



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

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**.

The screenshot shows the 'Assign Rules' configuration page for the 'Networking' application. The page is divided into several sections:

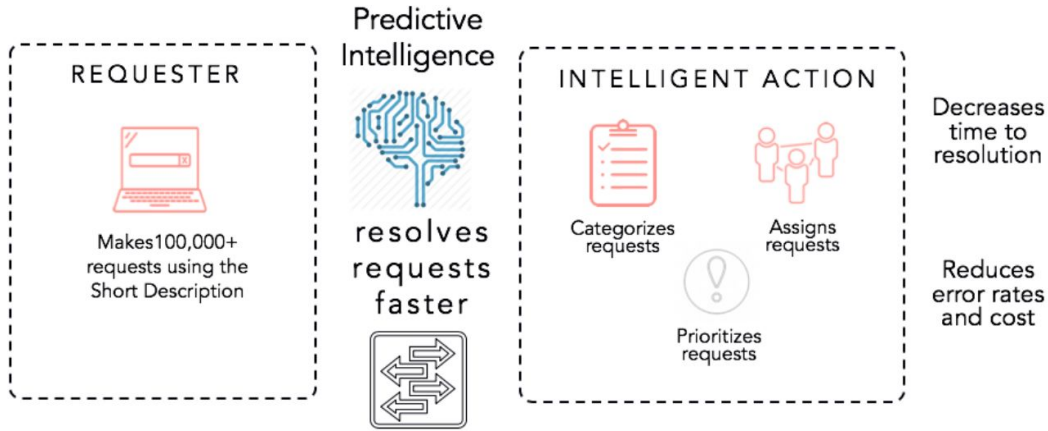
- Name:** Networking
- Application:** Global
- Active:** ☒
- Applies To:**
 - Table:** Incident [Incident]
 - Conditions:** Add Filter Condition, Add "OR" Clause
 - Category:** is
 - Dropdown:** -- None --, Inquiry / Help, Software, Hardware, **Network** (selected), Database
 - Logic:** AND, OR, X
- Assign To:**
 - User:** (empty)
 - Group:** Network
- Script:** (empty)
- Buttons:** Update, Delete

Determines
when the rule
will be applied

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



Set Predictive Intelligence to Resolve Requests Faster



Required roles: admin or ml_admin

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.

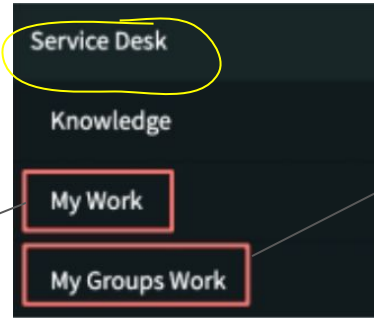
Image Source & Read More: [Predictive Intelligence](#) | ServiceNow Documentation



Accessing Tasks: My Work/ My Groups Work

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

Role: **itil** role



Your outstanding work:

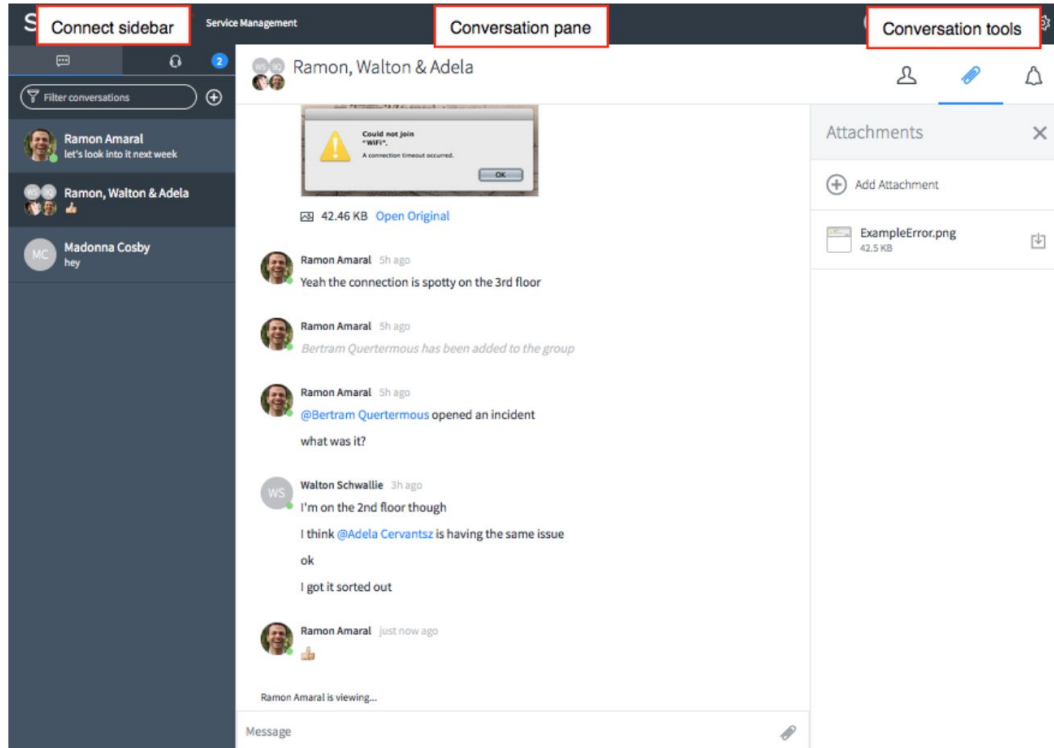
Active tasks assigned to you including change request, group approval, incident, knowledge base submission, etc

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

Read More: [Service Desk | ServiceNow Documentation](#)



Connect Chat & Connect Workspace for Collaboration



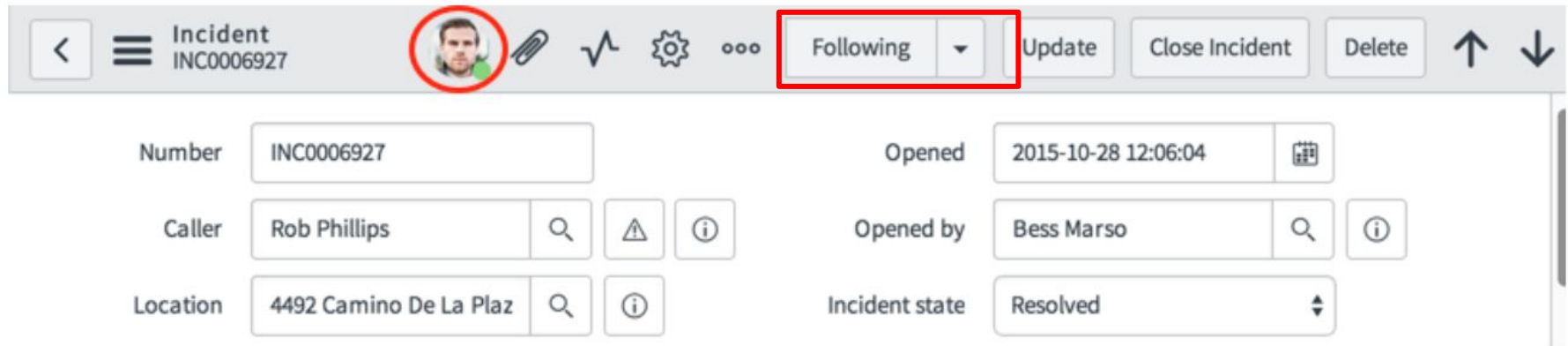
Connect Workspace - a full screen view of your Connect Chat & Connect Support conversations + additional tools

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



The screenshot displays the top section of a ServiceNow Incident form. The header bar includes a back arrow, a menu icon, the text "Incident INC0006927", a user profile picture (circled in red), a paperclip icon, a line graph icon, a gear icon, and a three-dot menu icon. A "Following" dropdown menu is highlighted with a red rectangle. To the right of the dropdown are buttons for "Update", "Close Incident", and "Delete", followed by up and down arrow icons.

Below the header, the form fields are organized into two columns:

Number	INC0006927	Opened	2015-10-28 12:06:04
Caller	Rob Phillips	Opened by	Bess Marso
Location	4492 Camino De La Plaz	Incident state	Resolved

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

Notes* | Related Records | Resolution Information

Watch list [lock icon] [edit icon] | Work notes list [lock icon] [edit icon]

Work notes [text area] [list icon]

* Additional comments (Customer visible) [text area]

Upon saving, additional comments will be emailed to the requester



Notes Tab: Activity

A complete history of a read-only record

Work notes

Work notes

☐ Additional comments (Customer visible)

Activities: 2

Who: S system

What: Email sent
Subject: Incident INC0010079 has been opened on your behalf
From: IT Service Desk
To: employee@example.com
[Show email details](#)

When: Email sent • 2018-05-22 05:48:34

The screenshot displays the 'Notes Tab: Activity' interface. At the top is a 'Work notes' text area with a 'Post' button and an option for 'Additional comments (Customer visible)'. Below this, the 'Activities' section shows a list of two activities. The first activity is an email sent from the 'IT Service Desk' to 'employee@example.com' on '2018-05-22 05:48:34'. Red circles highlight the actor 'S system', the email details, and the timestamp. Arrows point from 'Who', 'What', and 'When' labels to these respective elements.



Activity Stream Inline Editing

Update multiple active records without having to open a form interface

The screenshot displays the 'Incidents' management interface. At the top, there's a navigation bar with 'Incidents', 'New', and search fields. Below this is a filter bar showing 'All > Active = true > Assigned to = Bert Schadle'. The main area contains a table of incidents with columns for selection, info, ID, date, description, caller, priority, state, and category. Two incidents are listed: INC0010054 and INC0010032. An 'Activity Stream' flyout window is open on the right, showing details for the selected incident (INC0010054). The flyout has a title bar 'Activity Stream' and a close button. It contains a list of activity items, each with a title, resolution code, notes, and state. The first item is 'I'm having trouble with email attachments' by Buster Wubbel. Below the list is a text input field for a comment, with 'Cancel' and 'Post' buttons. Red boxes highlight the close button in the flyout header, the first activity item, and the comment input field.

	Number	Opened	Short description	Caller	Priority	State	Category
<input type="checkbox"/>	INC0010054	2019-10-09 14:30:52	I'm having trouble with email attachments	Buster Wubbel	3 - Moderate	In Progress	Software
<input type="checkbox"/>	INC0010032	2019-10-07 13:15:46	applications	Angelique Schermerhorn	5 - Planning	In Progress	Software

Actions on selected rows...

Activity Stream

I'm having trouble with email attachments

Resolution code [Empty] was Closed/Resolved by Caller

Resolution notes [Empty] was Closed by Caller

Incident state In Progress was Resolved

BW Buster Wubbel 2019-10-10 14:09:00 17h ago

I'm having trouble with email attachments

Resolution code Closed/Resolved by Caller

Resolution notes Closed by Caller

Incident state Resolved was In Progress

BW Buster Wubbel [Comment](#)

Customer decided to close Incident.

[Cancel](#) [Post](#)

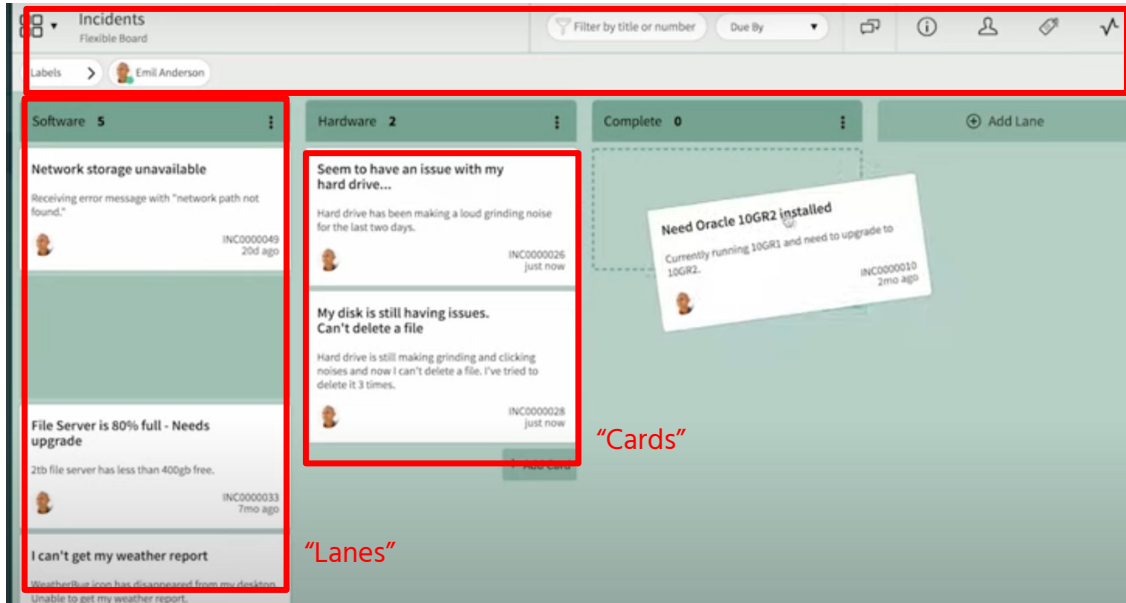
1. Show activity stream in a flyout window

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

