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

NEWApprenticeship
Experience »» Learn »» Lead

Learning Objectives

1. Demonstrate an understanding of the Now Platform architecture
2. Differentiate targeted purposes between the Now Platform interfaces
3. Analyze conceptually how roles, groups, and users work together to provide role-based access

Now Platform

- Application Platform-as-a-Service **(aPaaS)**
- A cloud-based platform to automate manual repetitive setup tasks (workflows), manage your IT processes, and standardize service delivery across the enterprise, not just IT Service Management (ITSM) infrastructure.
- A **single data model** that integrates with other systems and support various applications - helps your organization to consolidate business processes & build custom applications
- Encompasses the following three workflows or build any workflow app:
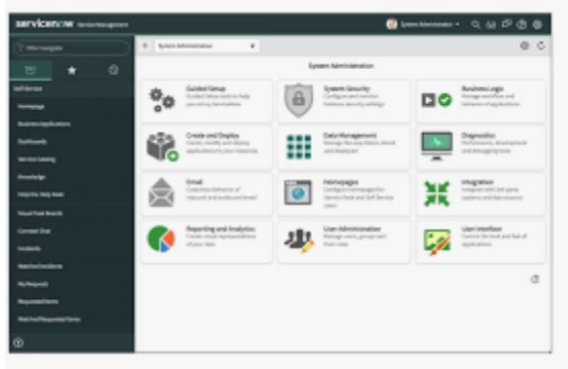
IT
Workflows

Employee
Workflows

Customer
Workflows

Now Platform Interfaces

Now Platform User Interface:

The primary tool to interact with the apps and information in an instance on ServiceNow

Now Mobile App:

Allows *employees* to submit incidents & requests, manage tasks, & access company resources

Allows users to upload images & attachments, sign documents, and participate in surveys

Service Portal:

Provides a self-service experience for users to (1) search for articles, catalog items, record, (2) submit request, and (3) browse the corporate news feed

ServiceNow Instances

Accessing ServiceNow means accessing an **instance** of the platform.

- Independent, configurable, and changeable
- **Single tenant:** not shared with other ServiceNow customers
- Each instance…
    - as a unique URL (e.g., http://<instance name>.service-now.com)
    - has applications - no need to purchase the entire suite
    - Has customer data that can be exchanged between instances, which makes it easy to migrate data in different stages of development (Dev, QA, Test, Prod)
- **Multi-instance** architecture: not built on a large central database infrastructure, data is isolated in their own databases, which makes it easier to resolve issues customer-by-customer basis

Log in to the User Instance

Navigate to: **https://<instancename>.service-now.com** (no a custom URL, but an admin can associate a custom URL to point to the instance name (Read: [Log in to an instance](#))

User Authentication by multiple methods:

- Local database - the user credentials are stored in their instance database
- Multi-provider Single Sign-on
- Multifactor: requires a passcode (or token) besides the password
- LDAP (Lightweight Directory Access Protocol)
- SAML 2.0 (Security Assertion Markup Language)
- OAuth 2.0 (Open Authentication)
- Digest Token

*For more information, read [User Authentication |](#) ServiceNow Documentation

Users & Groups

User [sys_user]

- Update records
- Import data
- Request items
- Develop apps
- Implement flows
- Run reports

Group [sys_user_group]

- A collection of users with a common purposes (e.g., Service Desk, Knowledge base authors)

Roles – Collection of Permissions

- Based on roles, groups or users are granted different access to applications & other parts of the platform, and assigned different security rights
- Role **[sys_user_role]**
- A user can have more than one role; in this case, any access granted to one role is auto-granted to any role that contains
- Role assignment: add the user to a group and then assign the role to the group (vs adding roles to individual users)
- Keep it in mind that roles that are assigned to the group from a user record cannot be deleted. You should remove the user from the group record first.
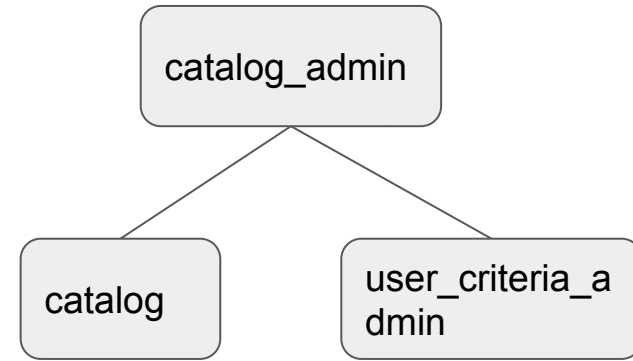
Read: Roles | ServiceNow Documentation

Examples of Persona Types

- **System Admin** - access to all system features, functions, and data, and can override ACL (access control list) rules and pass all role checks. *Grant this role carefully!!* (However, these users cannot impersonate a security_admin role user and elevate privileges while impersonating to access higher security functionality)
- **Specialized Admin** - grant certain roles without the full privileges of the admin role
- **Process Users** - these users may fulfill ITIL workflow-related processes (e.g., incident & change management)
- **Approver -** Can modify requests for approval routed to them.
- **Requester -** make requests using the Service Catalog and Self Service applications

(Read more) Base System Roles | ServiceNow Documentation

Impersonate a User

- Admins can impersonate other users for testing purposes. To impersonate:

1. Click "Impersonate User"
2. Select a user from the recent impersonates list or enter the user's name to search

- Not all users can be impersonated (e.g., a user with an specialized admin role for Human Resources or Security Incident Response)
- Impersonations are logged in the System Log.
    - Enable logging for interactive sessions by setting **glide.sys.log_impersonation** to true
- End a user impersonation by (1) opening the user menu by clicking the user name, and (2) select "End Impersonation"
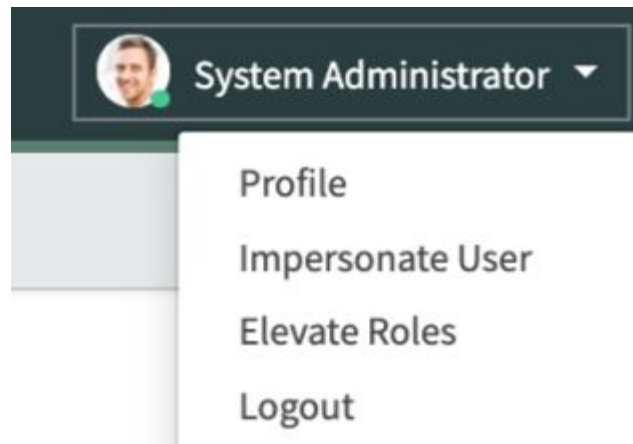
Read More: Impersonatate a User | ServiceNow Documentation

Elevate Roles

Required role: admin

1. Click your user name
2. Click "Elevate Roles"
3. Select an elevated role and click "OK"
4. When elevated roles are activated, the lock icon near the user name will become unlocked

(***Read more: Elevate to a privileged role | ServiceNow Documentation)
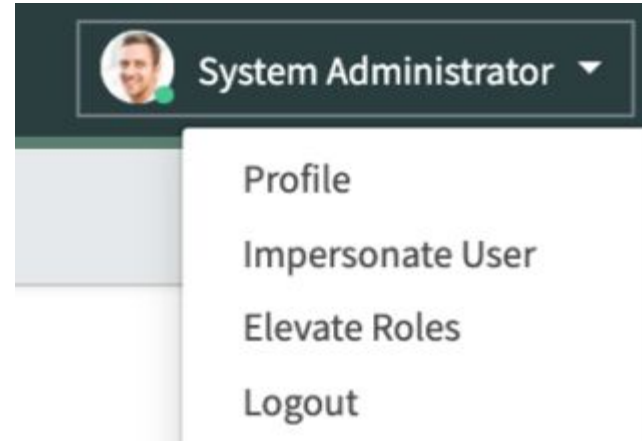
Learning Objectives

1. Identify the basic elements of the ServiceNow platform (such as banner frame, application navigator, and content frame)
2. Demonstrate how the ServiceNow user interface can be customized
3. Navigate the ServiceNow platform and configure/use basic features (such as branding, lists, and filters)

Now Platform User Interface

Banner Frame: important tools & settings

Application Navigator:

Application menus & modules based on permissions
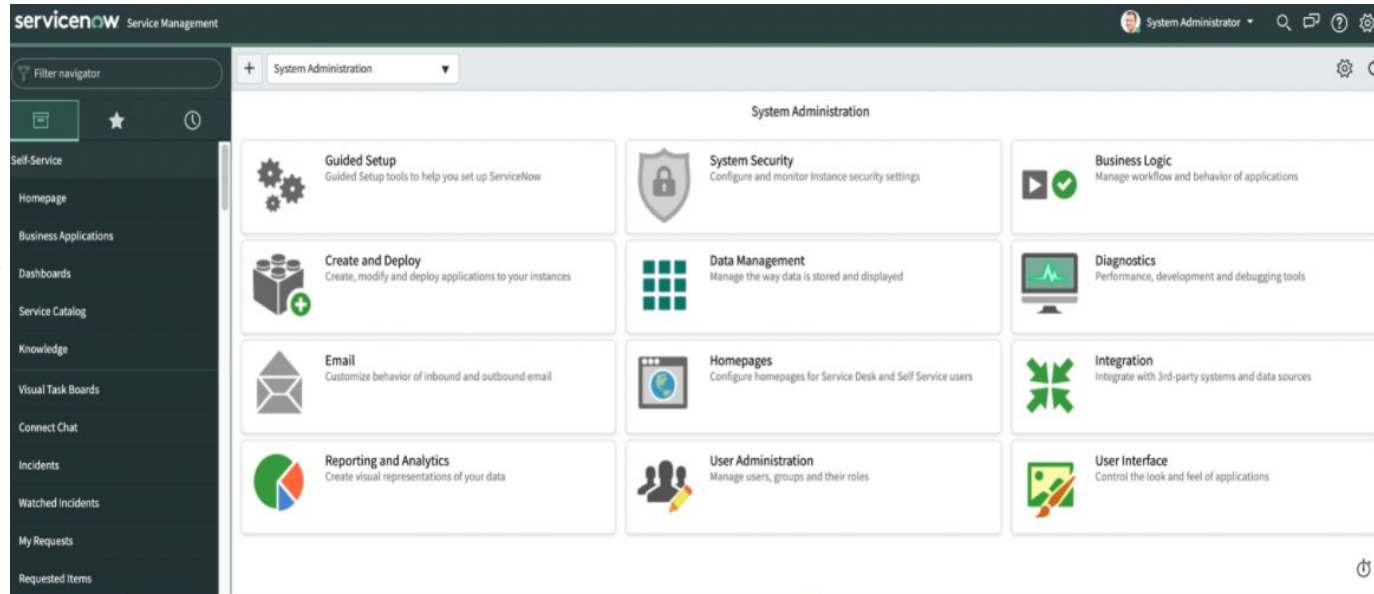
Content Frame:

Displays information (e.g., lists, forms, catalog, dashboard)

Banner Frame

Return to the
homepage

User menu to access profile
information and more
(impersonate & elevate users)

**Global
Search**

Get
help

servicenow Service Management   System Administrator ▾

Communicate with other
users with Connect Chat

Personalize instance settings ([Read
more](#) | ServiceNow Documentation)
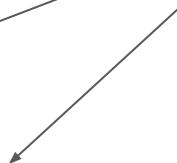
Application Navigation: Filter Navigation
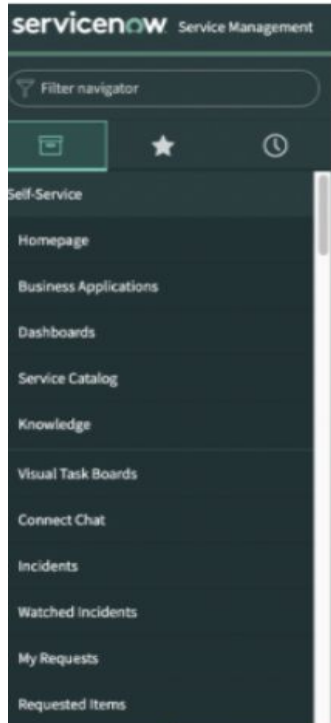
Filter Navigation ("GPS"): quickly navigate to applications & modules by simply typing all, or part of, the application or module name.

Or navigate directly to a table using:
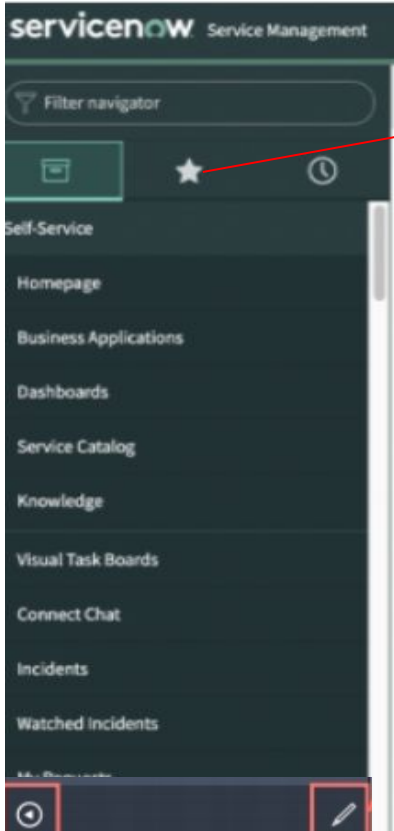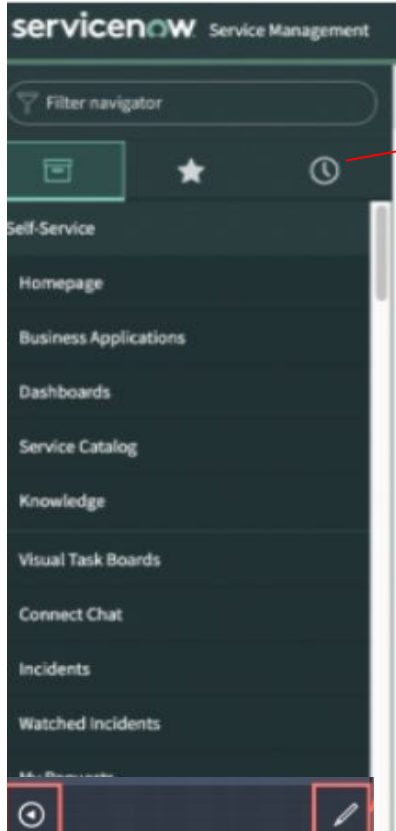
- <table name>.list - displays a list or records in the table
- <table name>.form - displays a blank form for creating a new record in the table

Application Navigator - Favorites tab

Favorites displays items that are added as favorites.

Add favorites by:

- Clicking the star icon by a module or by an application
- Select "Create Favorite" from a list or form context menu
- Drag a breadcrumb to the **Favorites** tab

Read More: Use the UI16 navigator | ServiceNow Documentation

Re-order, edit, or remove your favorites by clicking this icon

Application Navigator –Your History

Your History demonstrates recent activities (e.g., forms, lists, catalog items, homepage visited, but not UI pages and non-standard interfaces)

By default, it displays up to 30 recent activities, which can be adjusted in the system properties table by administrators (sys_properties.list)

Re-order, edit, or remove your favorites by clicking this icon

Useful Links

docs.servicenow.com - the official documentation resource for ServiceNow

community.servicenow.com - collaborate, share, and produce ideas, content & find answers to your questions!

(Lab) Applications and Modules

Use your PDI to complete (**Lab) Applications and Modules**

Active Recall

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

Learning Objectives

- Understand the benefits and configuration options for branding a ServiceNow instance.

Branding – Personalize Your Instance

Return to the homepage

User menu **t**o access profile information and more (impersonate & elevate users)

Global Search

Get help

servicenow Service Management

System Administrator

Communicate with other users with Connect Chat

Personalize instance settings (Read more) *depending on roles, users may have access to different setting options

Examples of System Settings

- **General Tab** - Accessibility enabled, compact the user interface, compact list date/time, language etc etc
- **Theme Tab** - Select the system theme to return to the default theme
- **Lists Tab** - Wrap longer text in list columns, Modern cell styles, etc
- **Forms Tab** - Tabbed forms, Related list loading,
- **Notifications Tab** - Search, Allow notifications, etc
- **Developer Tab** - settings for developers

(Read more: System settings for the user interface)

Brand Your Instance

An **admin** can modify the system branding by navigating to **System Properties** > **Basic Configuration UI16:**

- Change a banner image, text, and colors (use <u>predefined color names, RGB hex or decimal</u>), browser tab title, date/time format, etc
- Read: <u>Configure logo, colors, and system defaults for UI16</u>.

(Lab) Branding

Using your PDI, complete (**Lab) Branding**

Active Recall

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

Lists & Filters Overview

Learning Objectives

- Learn how to configure lists and filters in ServiceNow

Lists

*** Displays a set of records from a table – the most common way to interact with data

List Context
Menu: options to related to viewing & filtering the incident list

List Features

Record list

A quick form of filter navigation

Breadcrumbs

Title bar

Column headings

Fields

Right-click to access additional actions

Image source & Read More: Lists | ServiceNow Documentation

List Editing

Use the List Editor to edit fields without opening the record:

1. Double-click in an empty area of the field.
2. Enter the appropriate values.
3. Save the records

Also, use quick edit functions to edit records (Methods for List Edits):
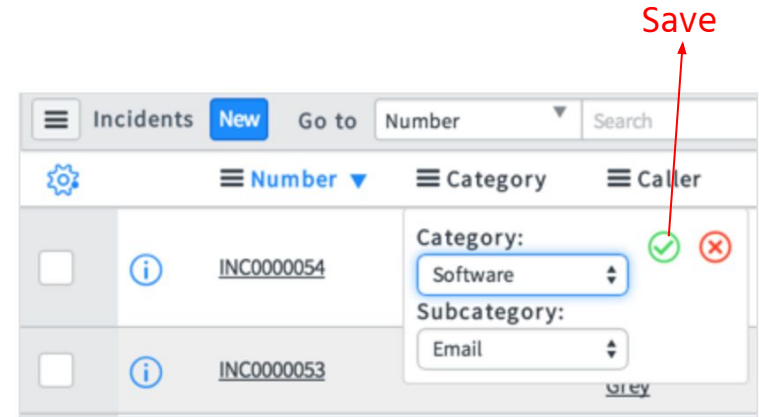
- Assign to me
- Approve
- Reject
- Assign tag

Image Source & Read More: Use the List Editor | ServiceNow Documentation

Locate Information in ServiceNow

ServiceNow offers various search functions to locate information including Wildcard (using a symbol to represent zero or more characters:

Wildcard	Description
*search-term %search-term%	Search for values that contain search-term.
%search-term	Search for values that end with search-term.
search-term%	Search for values that start with search-term.
=search-term	Search for values that equal search-term.
!*search-term	Search for values that don't contain search-term.
!%search-term	Search for values that don't end with search-term.
!=search-term	Search for values that don't equal search-term.

Table Reference: Searching a List | ServiceNow Documentation

Filters

Edit filter conditions

Breadcrumbs

All > Active = true > Priority = 2 - High > Category = Software

Run   Save... | AND   OR   Add Sort

All of these conditions must be met

Active ▾ is ▾ true ▾ AND OR ✕
Priority ▾ is ▾ 2 - High ▾ AND OR ✕
Category ▾ is ▾ Software ▾ AND OR ✕

Field   Operator   Value

Image Reference: Filters and Breadcrumbs | ServiceNow Documentation & Filters

Tags

Use tags to categorize, group, organize, and locate records.
- Globa: visible to any user
- Shared: visible only to specific groups or users
- Private: visible to a single user

Assign tags
- from the list view using inline field editing
- from a list using the action menu
- from the list context menu
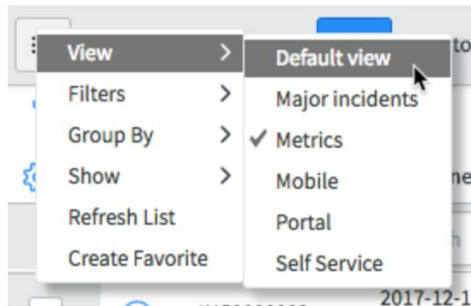- from the form or list view. You can also add tags to a homepage.

Read More:
- Tags | ServiceNow Documentation
- Assigning Tags | ServiceNow Documentation

View – the elements that appear when a user opens a form or a list

List view list

System admin can create views for lists or forms for different users

Self service view

Image Source & Read More: View Management | ServiceNow Documentation

Configure the List Layout

Users with the **admin or personalize_list** role can configure a list to determine which columns appear in a list, create list views, and create fields on the table.

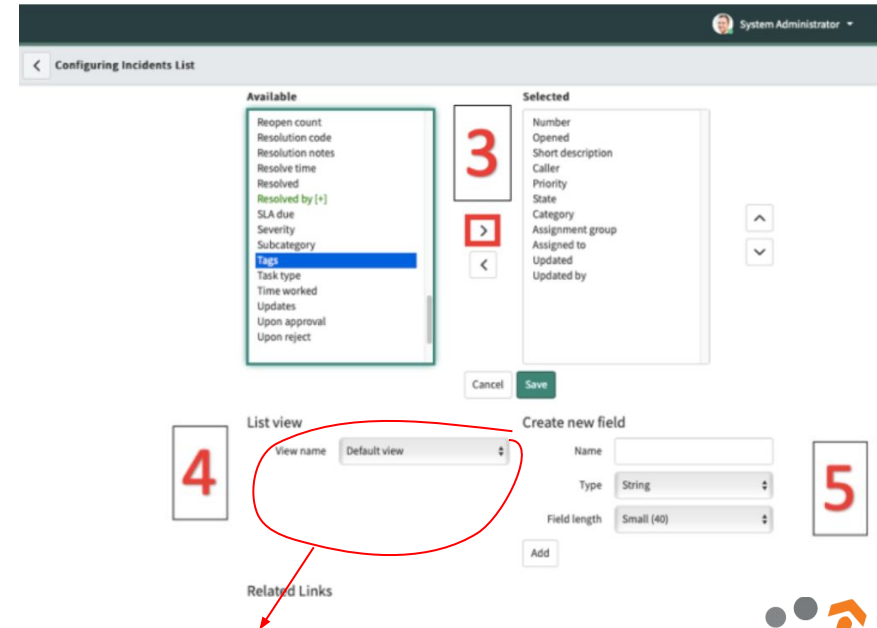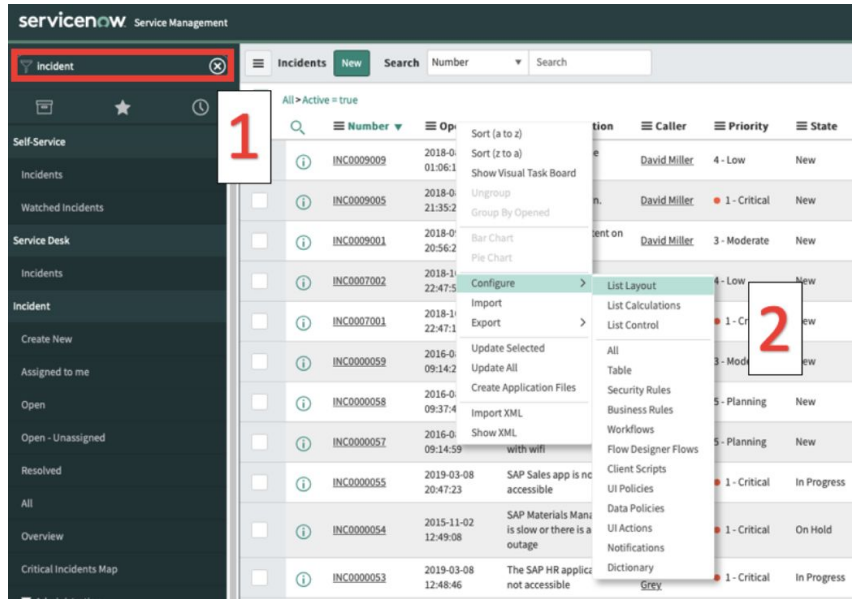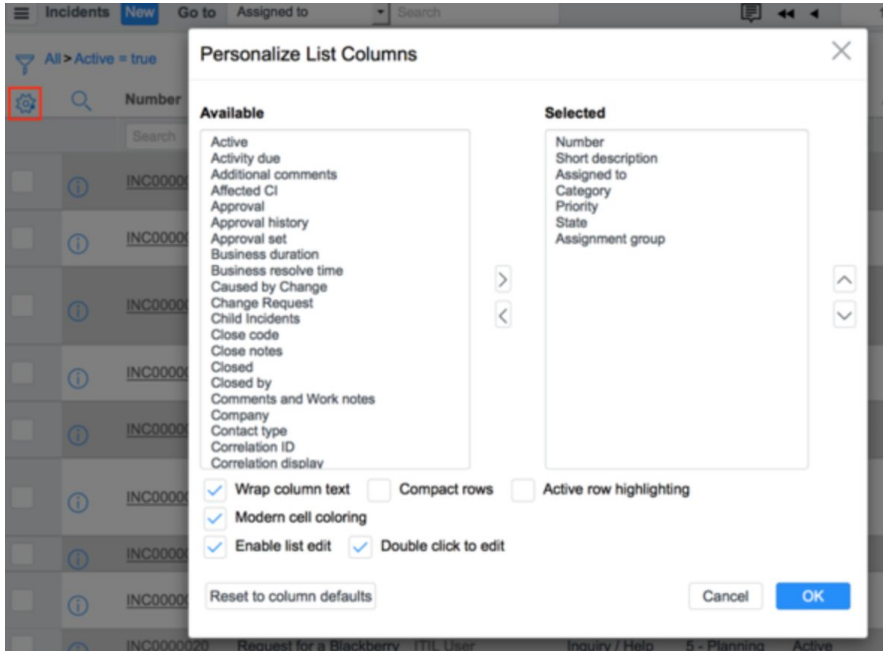Image Source: ServiceNowScholar.com

To create a new list view, click "New" in the dropdown menu

Personalize a List

Keep it mind that the **Personalize List** modifies the list layout for an *individual* user while the List Layout configuration affects *everyone*

(Question) What can be personalized?

Image Source & Read More: Personalize a v2 List | ServiceNow Documentation

(Lab) Lists & Filters

Using your PDI, complete (**Lab) Lists & Filters**

Exit Questions

- The three components of the Now Platform User Interface are: **Banner** [   ], [   ] **and** [   ] [   ]
- An admin can change the look and feel for an instance by navigating to [   ]
- [   ] can be applied to a list to isolate a subset of the data
- [   ] can be used to categorize, flag, and locate records
- A row in the ServiceNow database represents a [   ]
- The three components of a filter condition are: [   ] [   ] [   ]
- [   ] defines which fields appear in a list

Active Recall

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