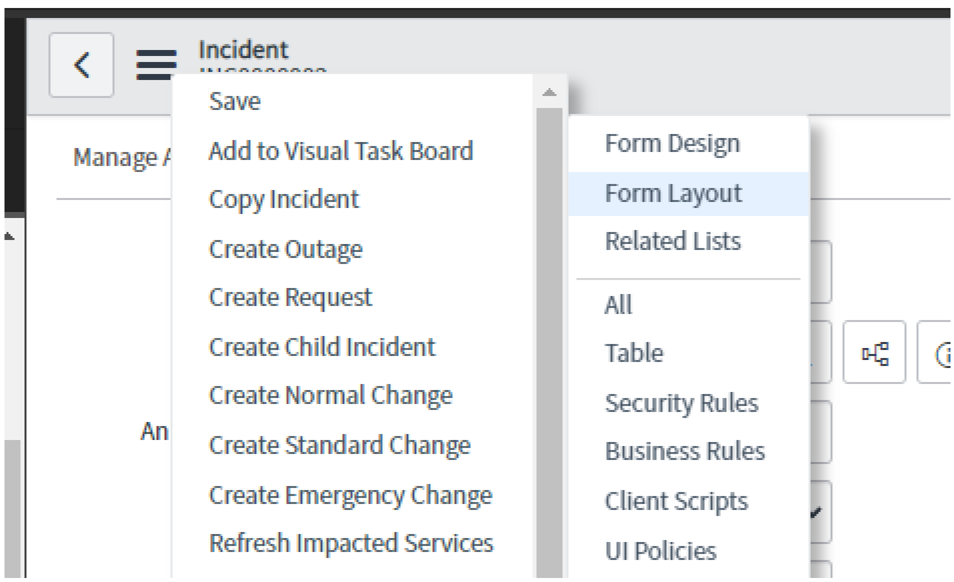
NEWApprenticeship
Experience ››› Learn ››› Lead

Form Configuration

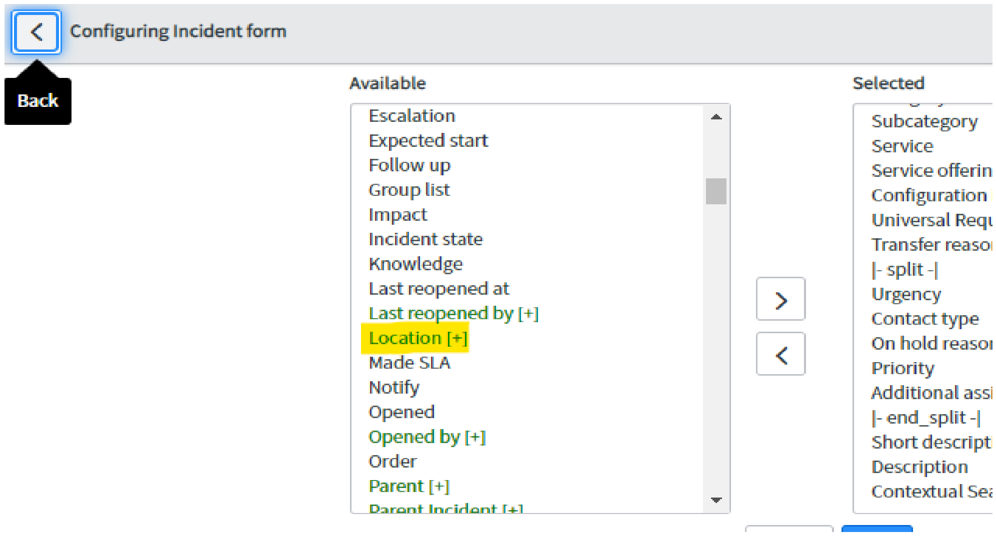
Scenario: The company's employee testing of Infinity is going well. Winnie R. will lead the team to further organize Infinity testing support. This will be done by requesting a new form view on the incident table that holds appropriate fields for identifying reported issues correctly.

A. Create the Infinity Form View

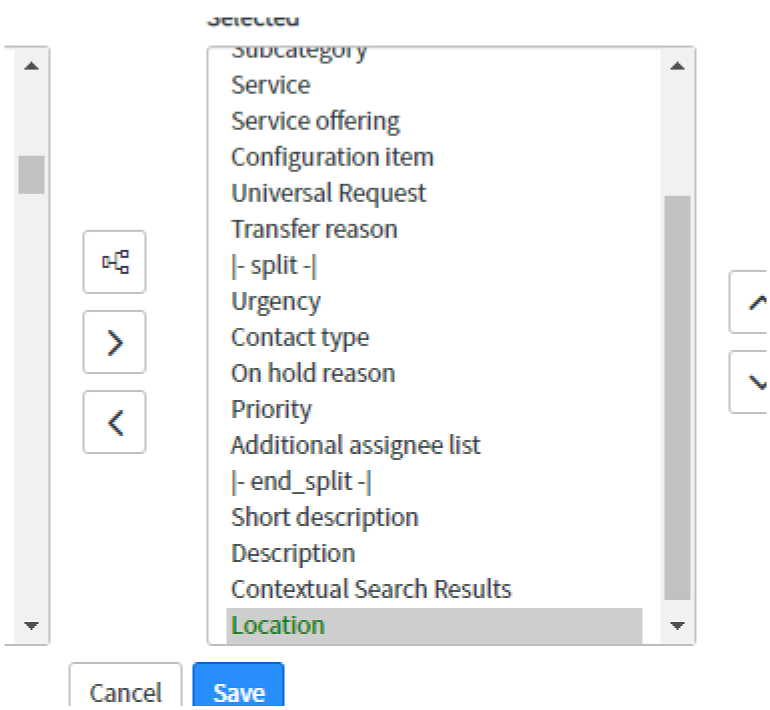
1. Log in as the System Administrator
2. Go to **Incident > Open** and open any record in the list. (**Example INC0000002**)
3. Go to the **Form Context Menu**, click **Configure**, the select **Form Layout**.



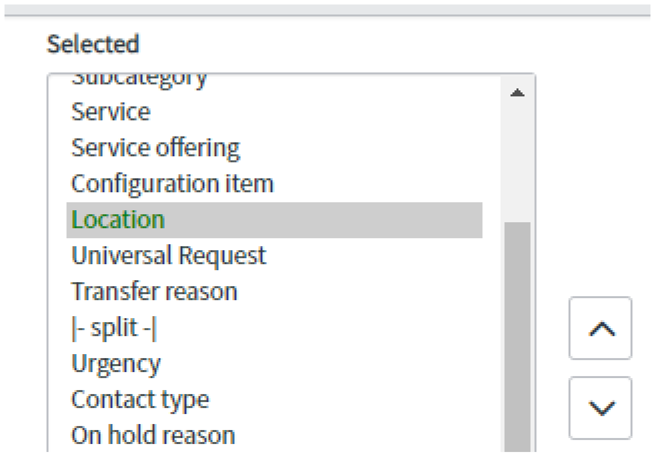
4. Find and highlight the **Location** field under the **Available list** (If you cannot find the Location field, highlight the first field in the Available list and type "Location")



5. Click the **>** (Add) button. This will add the **Location** field to the bottom of the **Selected** list.



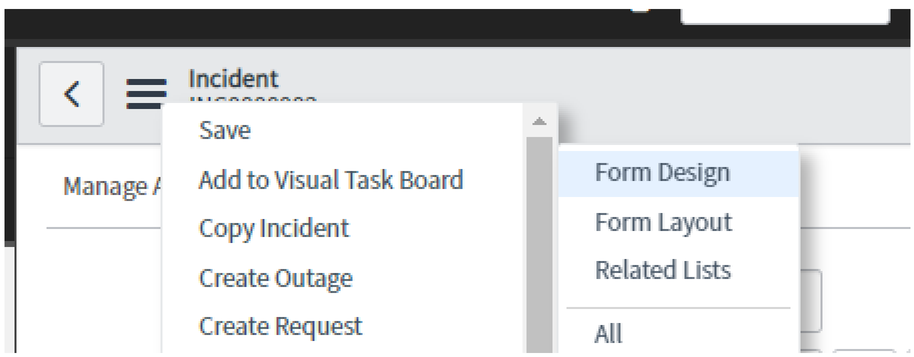
6. Once the Location field is added to the Selected list, move it under the **Configuration item** field by clicking the **^** (Move up) button. (Bonus) You can also reorganize the items by selecting the field in the **Available** list, then select the field under which you want to transfer the item in the **Selected** list, and arrow over.



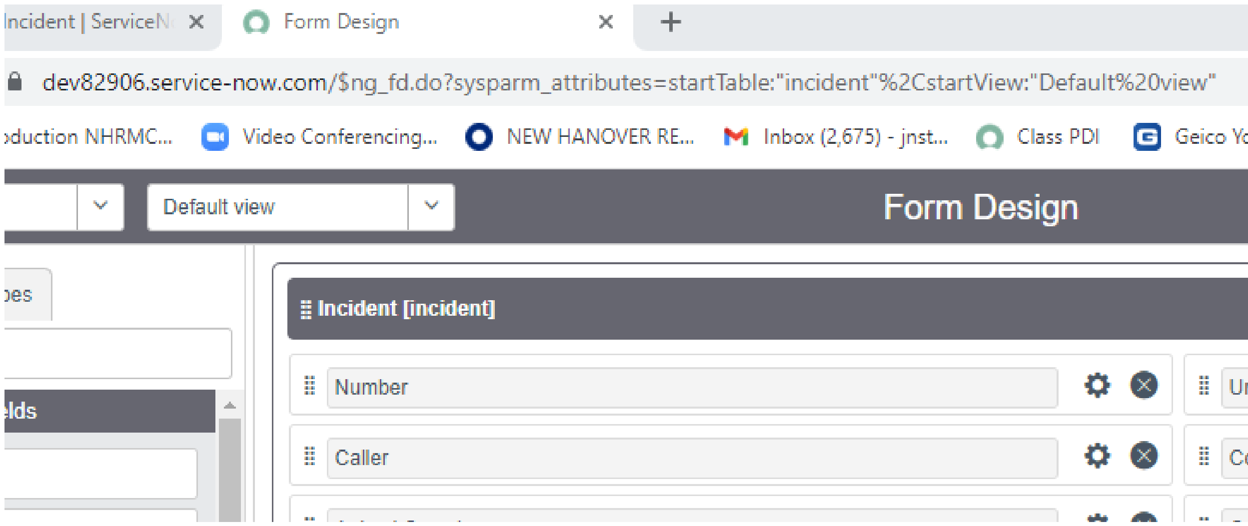
7. Click **Save** to return to the incident form. You will see **Location** under the **Configuration item** field.

B. Modify View using Form Design

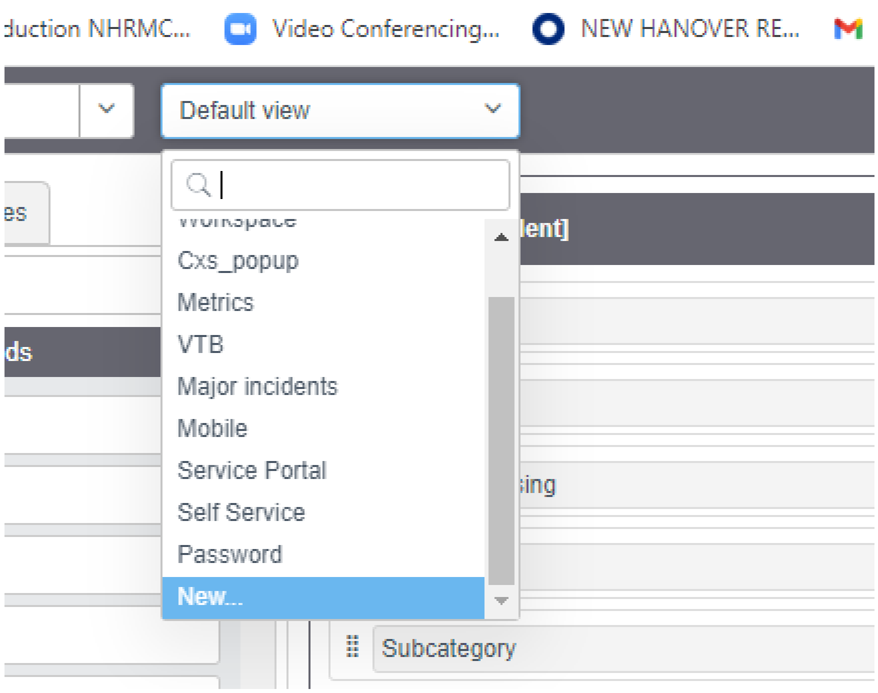
1. Go to the **Form Context Menu**, click **Configure**, the select **Form Design**.



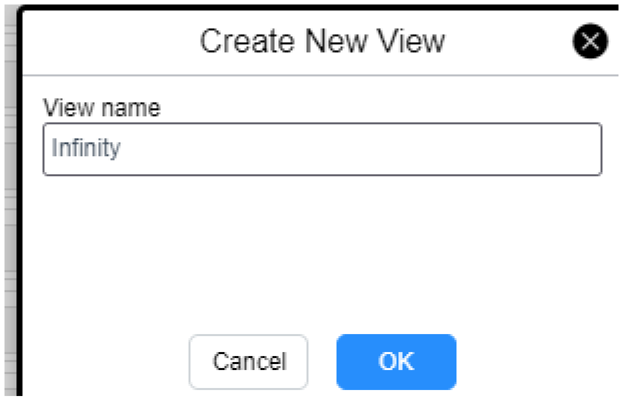
It will open a new tab or window. There are two dropdown menus in the header on the left side of the page. The menu on left shows the table the form view is associated with, the one on the right includes the various views defined for the selected table.



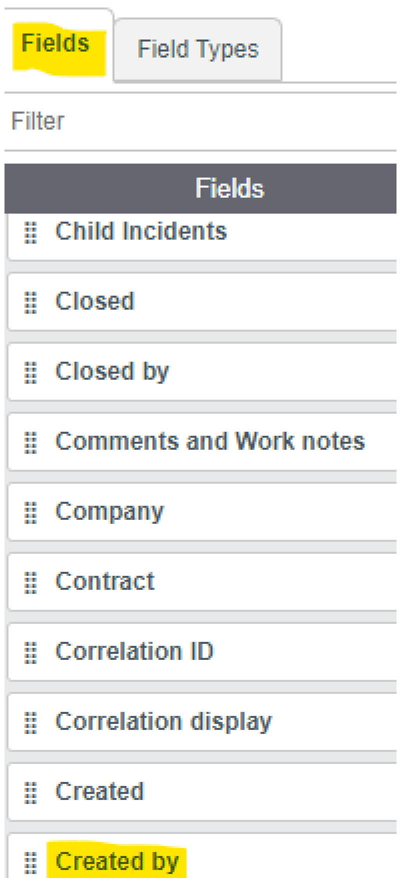
2. Open the dropdown menu on the right and select **New**.



3. Enter the View name: **Infinity** and click **OK.** The new Infinity view is automatically selected in the view menu.



4. Go to the **Fields** tab of the Field Navigator on the left and scroll down to the **Created by** field. (Bonus) You can also search for a field or field type by using the search function in the Field Navigator.

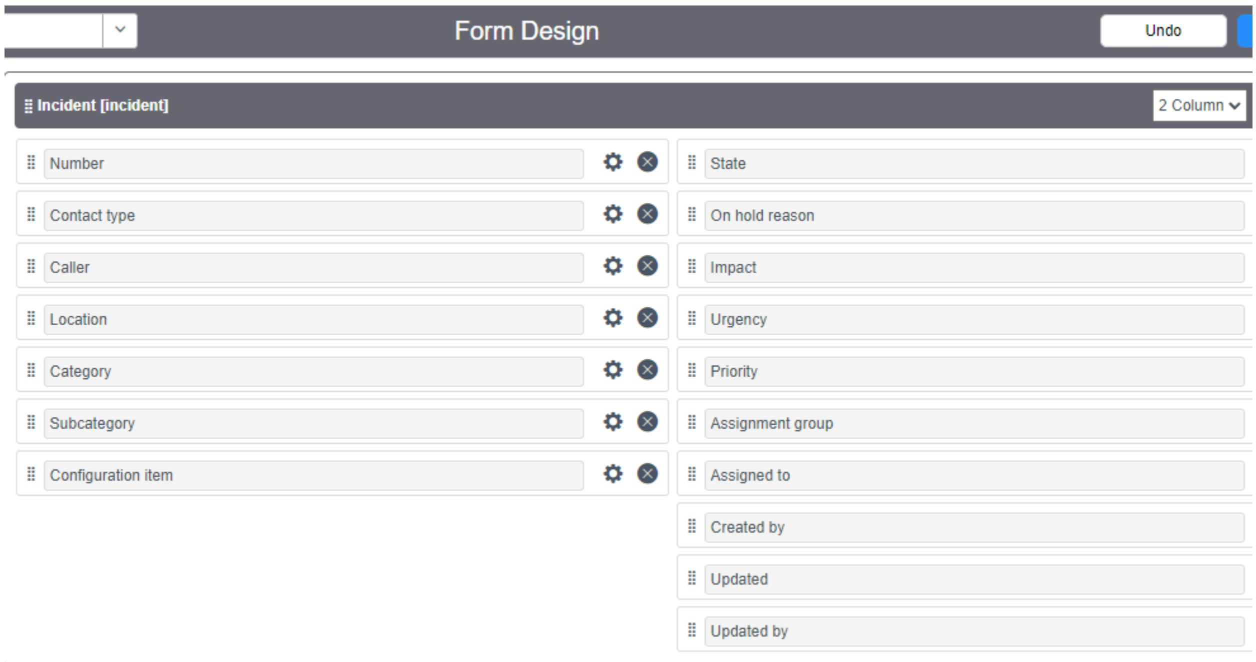


5. Add the **Created by** field to the form view
   i. Click and hold on the **Created by** field
   ii. Drag and drop **Created by** to the form layout between **Caller** and **Category.**

    iii. Repeat these steps to add the **Updated** and **Updated by** fields to the form layout within the Incident section.

6. Locate the Service field on the form layout and remove it by clicking the **X** icon.
7. Remove these additional fields: **Service offering**, **Universal Request**, and **Transfer Reason**. Removing a field returns it to the Fields tab of the Field Navigator, so it may be readded to the form if needed.
8. Drag and drop the **Contact type** field under the **Number** field. (*Note: You can reorganize fields by selecting the 8 dots)*
9. Reorganize the fields in the incident section to match this layout

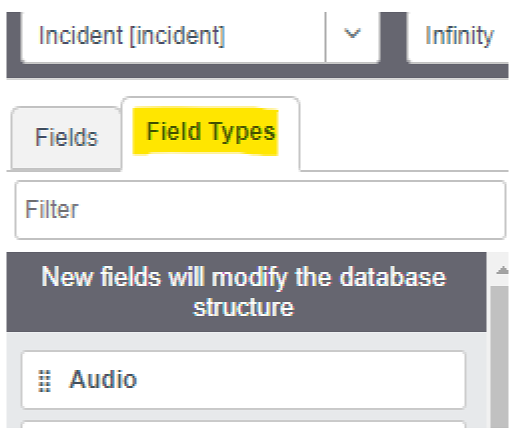
Number	State
Contact type	On hold reason
Caller	Impact
Location	Urgency
Category	Priority
Subcategory	Assignment group
Configuration item	Assigned to
	Created by
	Updated
	Updated by



10. Click **Save.**

C. Define a New Field

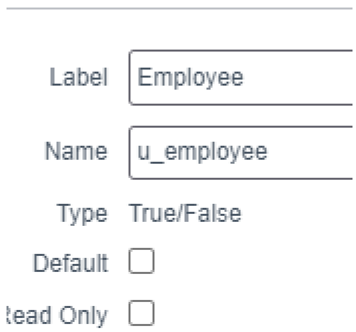
1. Click the **Field Types** tab on the Field Navigator.



2. Scroll down to find the **True/False** field type and add it to the form layout under the **Caller** field.
3. Configure the **True/False** field's properties by clicking the gear icon.

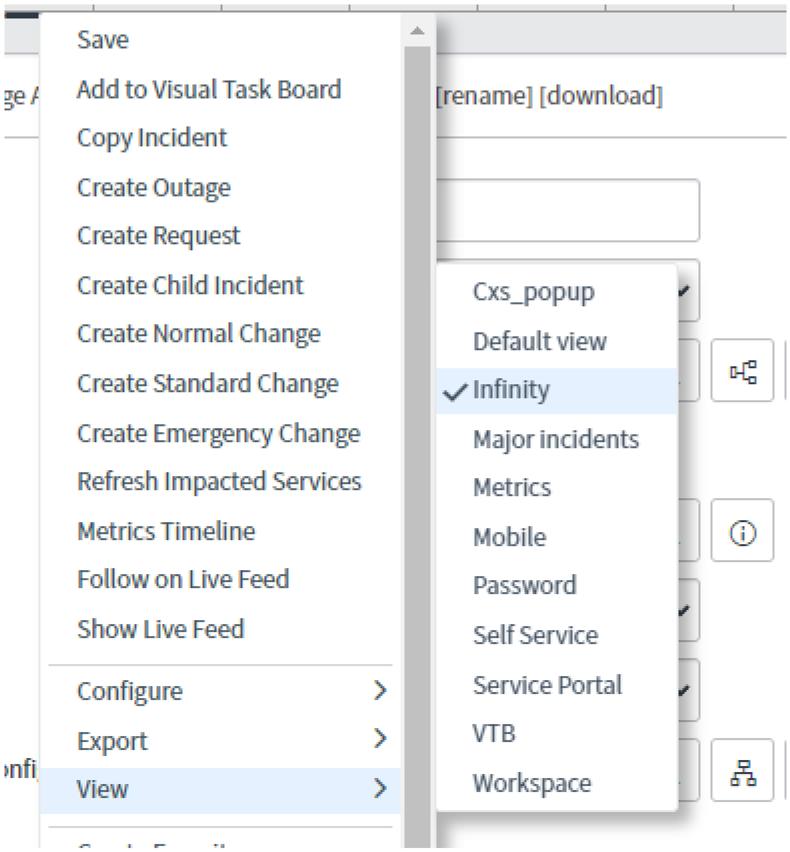
4. Enter the following values:
    i. Label: **Employee**
    ii. Name: **u_employee**

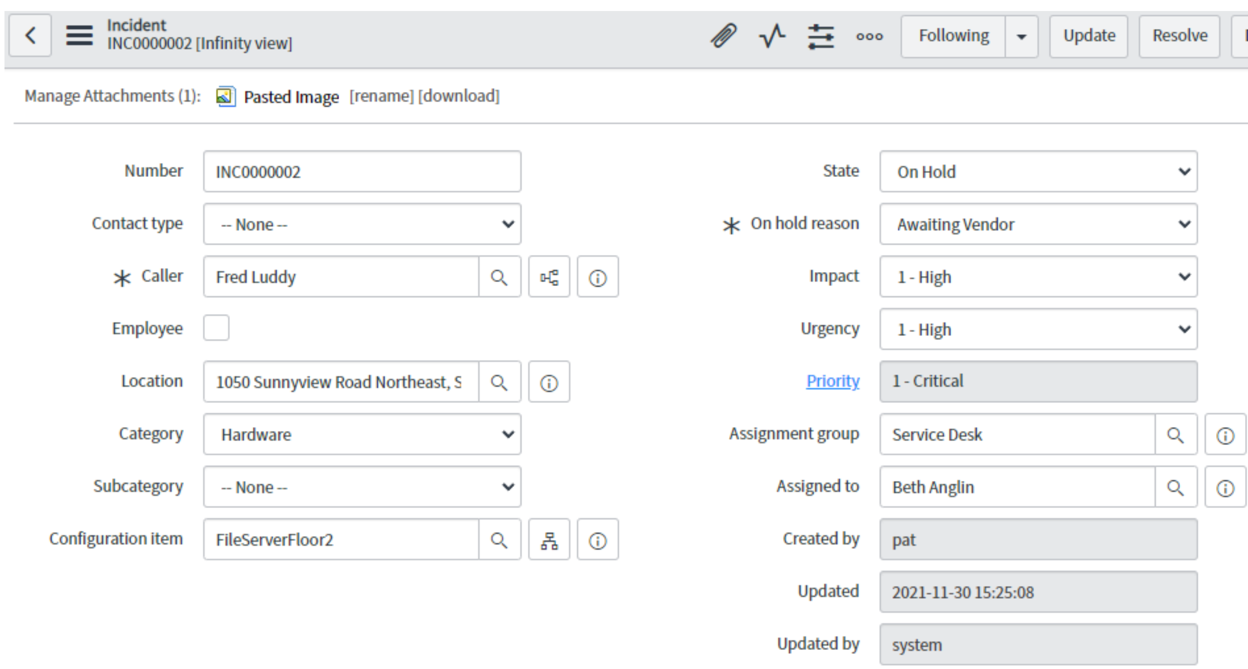
    (*Note: The prefix **u_** is the naming convention for a user-created item)*



5. Click **X** to close the Properties window. It will automatically save newly modified field properties.
6. Click the **Save** button from the header page to save the form view.

7. Close the **Form Design** tab/window and return to the ServiceNow lab instance.
8. Go to the **Form Context Menu** (Incident) and select **Reload form** to reload the form and update the View options.
9. Open the **Form Context Menu** (Incident), click **View** then select **Infinity** to display the form.


Save
Add to Visual Task Board
Copy Incident
Create Outage
Create Request
Create Child Incident
Create Normal Change
Create Standard Change
Create Emergency Change
Refresh Impacted Services
Metrics Timeline
Follow on Live Feed
Show Live Feed
Configure
Export
View
[rename] [download]
Cxs_popup
Default view
Infinity
Major incidents
Metrics
Mobile
Password
Self Service
Service Portal
VTB
Workspace


Incident
INC0000002 [Infinity view]
Following
Update
Resolve
Manage Attachments (1): Pasted Image [rename] [download]
Number INC0000002
Contact type -- None --
Caller Fred Luddy
Employee
Location 1050 Sunnyview Road Northeast, S
Category Hardware
Subcategory -- None --
Configuration item FileServerFloor2
State On Hold
On hold reason Awaiting Vendor
Impact 1 - High
Urgency 1 - High
Priority 1 - Critical
Assignment group Service Desk
Assigned to Beth Anglin
Created by pat
Updated 2021-11-30 15:25:08
Updated by system