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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Notifications Overview

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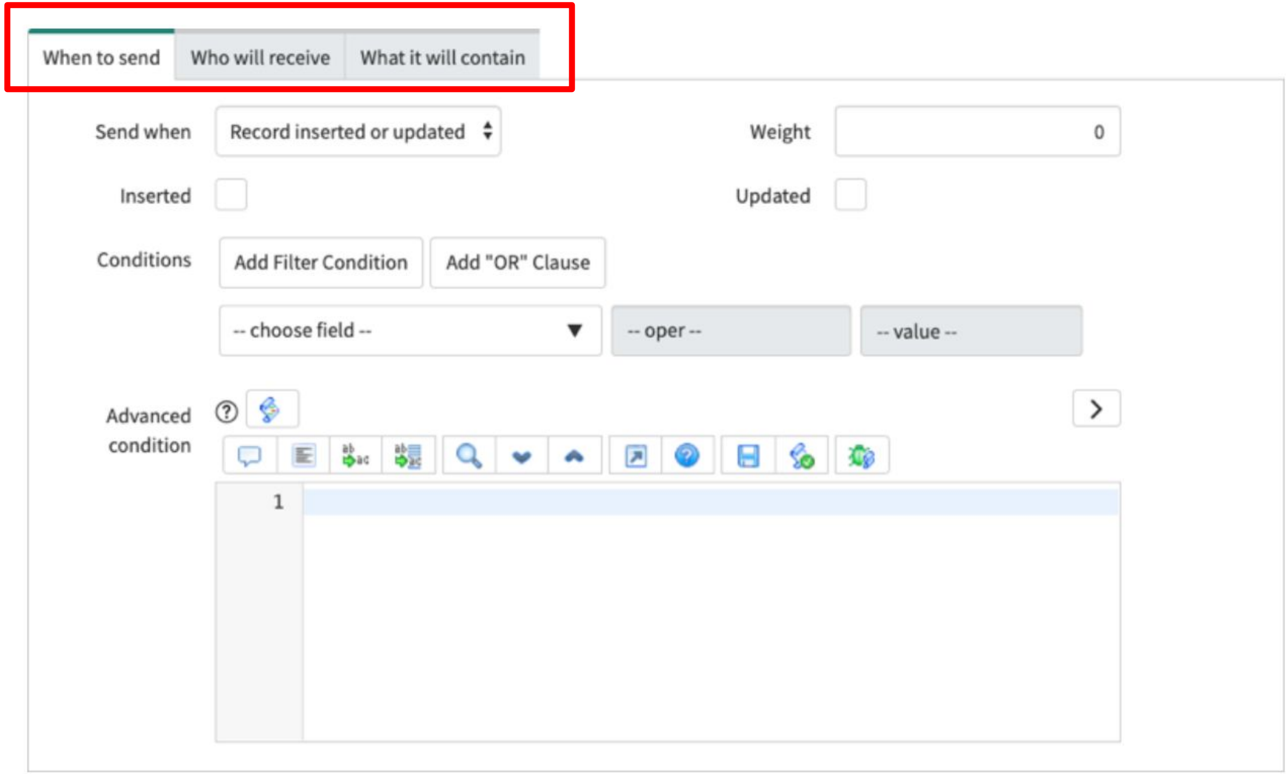
Learning Objectives

- Configure outbound email notifications that include field values from a task
- Manage user notification subscriptions

Notifications (Emails, SMS, & Meeting Invitation)

System Notification > Email > Notifications and then click “New”

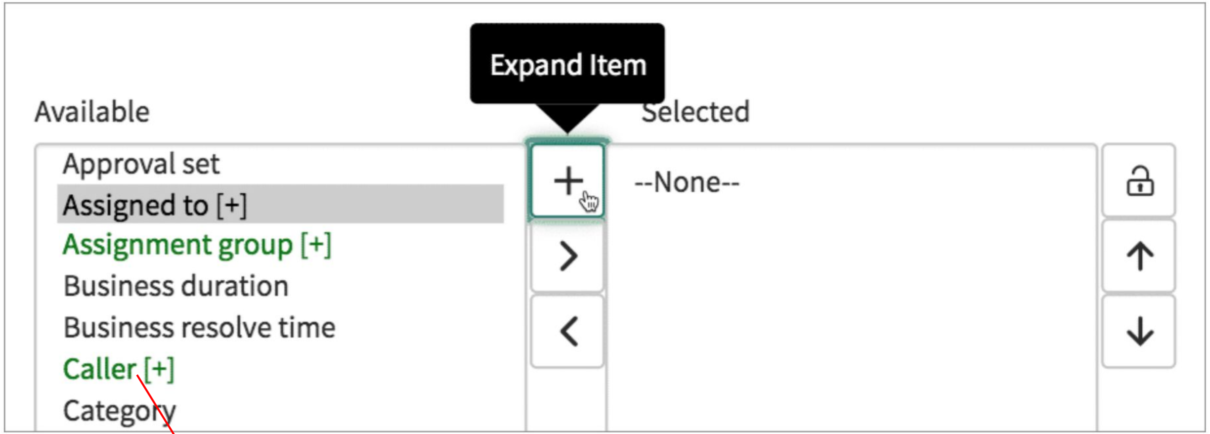


- Triggered by events in the platform (no scripting needed)
- Your recipients must be active users
- (Tip) Consider limiting the recipient list to 1000 users. By default, the system creates multiple notification messages with up to 100 recipients each for a notification with more than 100 recipients (*to change the setting: **glide.email.smtp.max_recipients**)

Image Source & Read More: [Create an email notification](#)| Servicenow Documentation

Configuring notifications: Use dot-walking

Dot-walking gathers information from tables through reference fields



Identify recipient:
Users/Groups in fields

(Note) a dot walking field is notated by the green color and the + beside the field name.

Lab: Notifications

Complete Lab: Notification in your PDI

Active Recall

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

Reporting Overview

Learning Objectives

- Demonstrate how to view and run reports
- Use lists to create visual charts in reports
- Create, edit, distribute, and schedule reports

Getting Started with Reports

- Reports: visualization of your data that can include bar charts, pie charts, lists, pivot tables, donuts, and more (*make it interactive)
- Use pre-defined reports for applications like incident management or create your own reports (Reports > View / Run) to address key questions such as meeting an SLA, how many incidents were resolved a month, key metrics and key performance indicators (KPI)

Read: Getting Started with Reports | ServiceNow Documentation

Choosing a Report Type

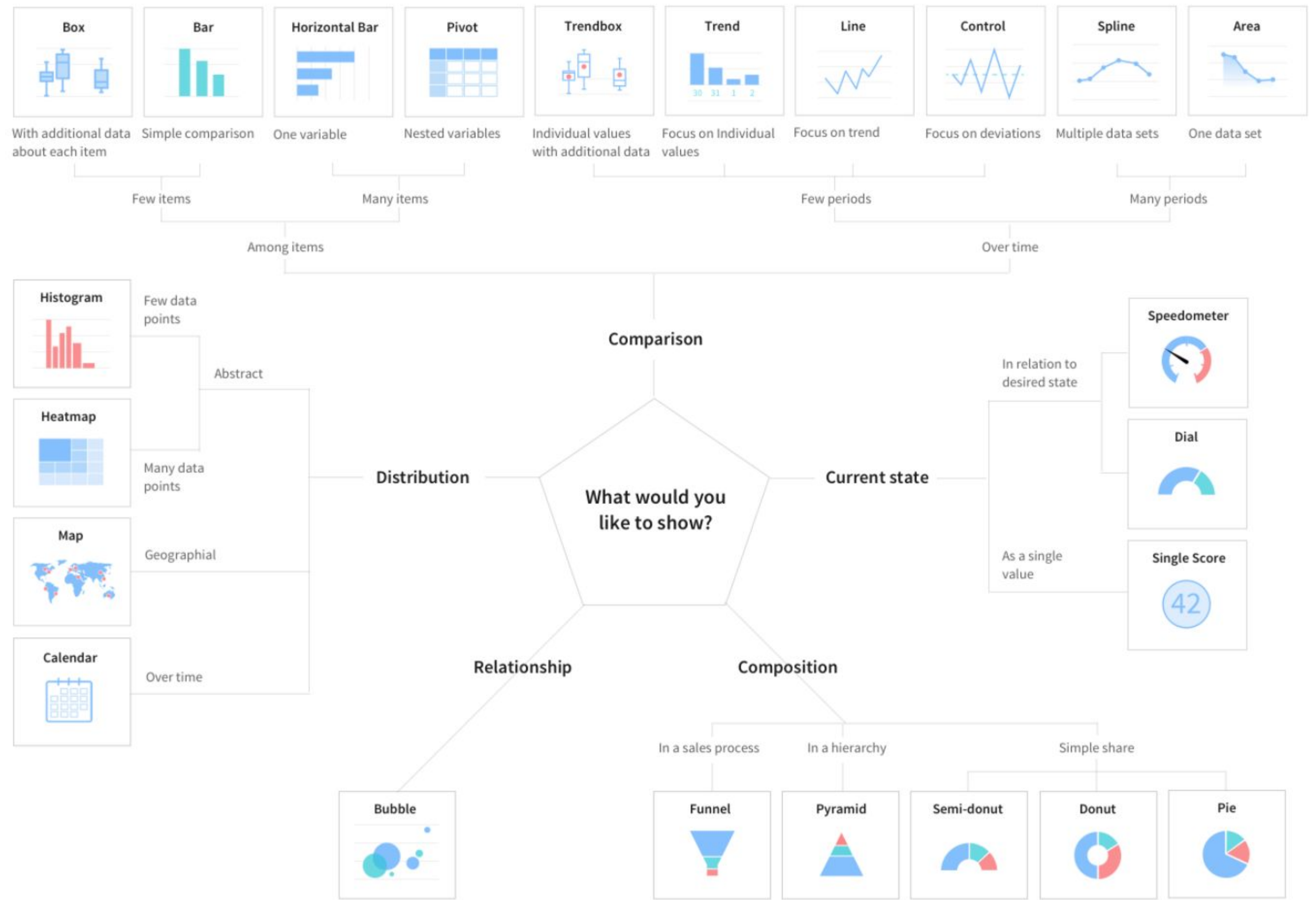
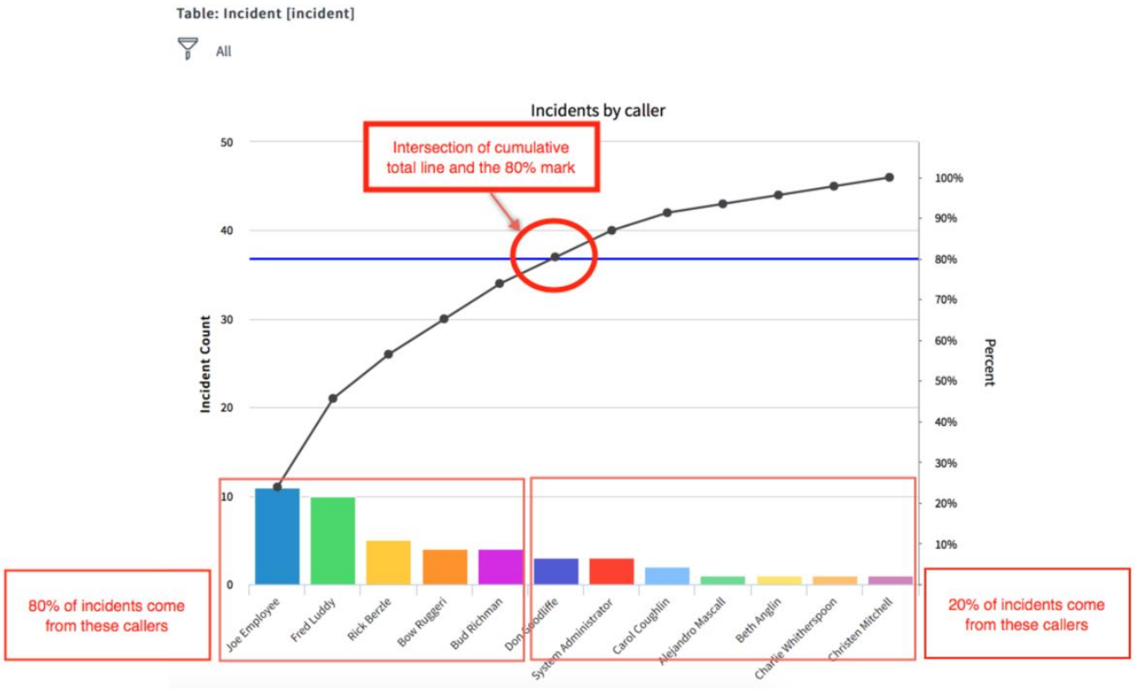


Image Source: [Creating Reports | ServiceNow Documentation]

Example of a Chart: Pareto



Contains both bars and a line graph:

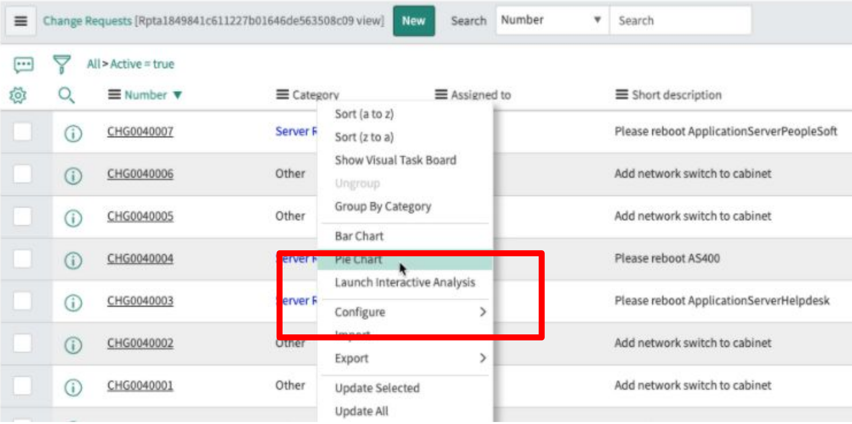
Bars: display the data in descending order from left to right

line graph: the cumulative totals from each category in the same order

*Use the rule that about 20% of input produces almost 80% of the outputs

[Image Source & Read More: Pareto Reports | ServiceNow Documentation]()

Create a new report from a list



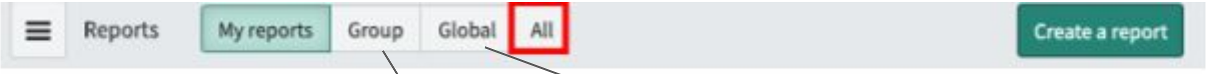
- Navigate to the list
- Right-click the header of the column that contains the values to display
- Select Pie or Bar Chart

Create a new report or edit existing ones: Reports > View / Run

Image Source & Read More: [Run a Report]()

Sharing Settings: Report Visibility Controls

Reports > View / Run: contains a library of reports to run and use to create your own reports



Created by you, only visible to you

Visible to only specific groups

Available to everyone

Read More: Sharing a Report| ServiceNow Documentation

Report Designer

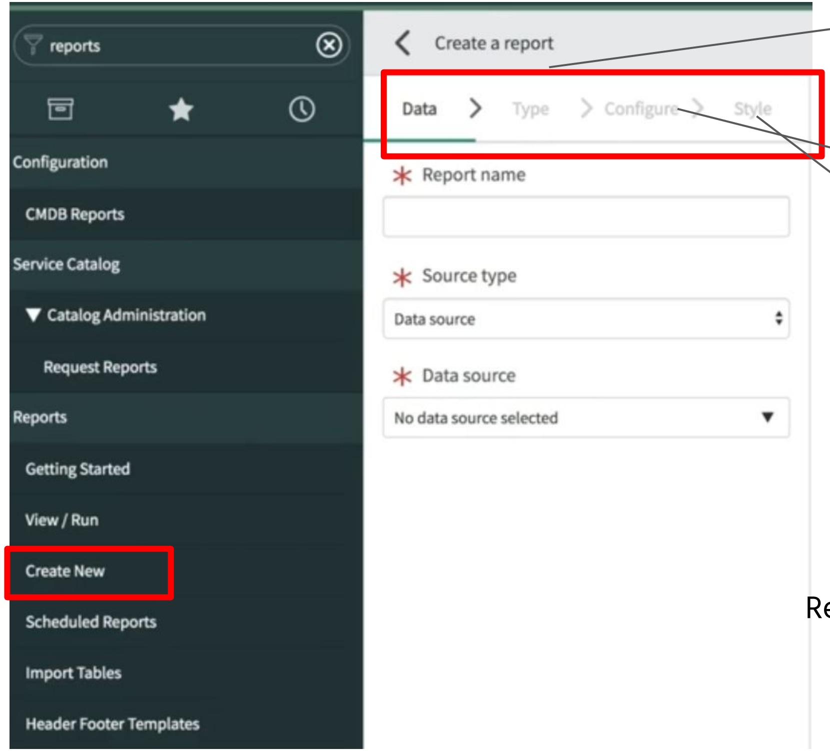


Image Source: ServiceNow Fundamentals @Now Learning

Type: select a visualization type

Configure: Group the data, run calculations, etc

Style: adjust the look (e.g., color)

Report info

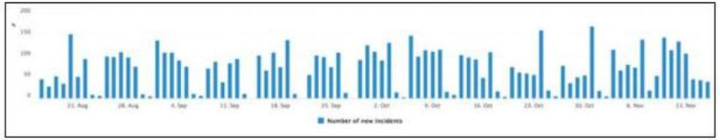
Sharing
- Share
- Schedule
- Add to dashboard

- Update
- Insert
- Insert & Stay
- Save as report source

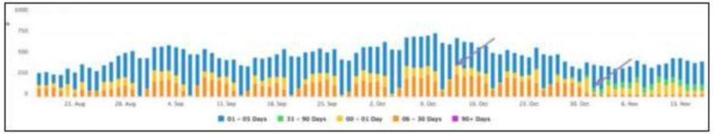
For more detail, read : [Create a report visualization]

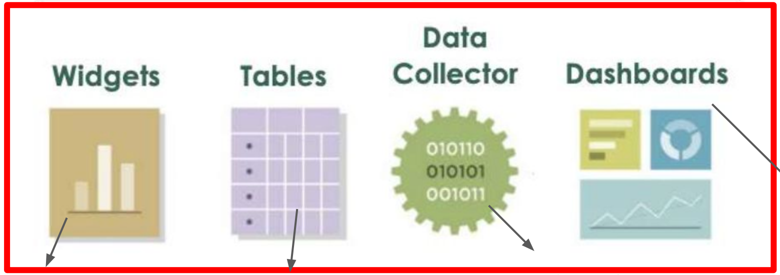
Reports & Performance Analytics

Number of New Incidents



Open Incidents by Age





Saved view of indicator or breakdown

Indicator source

Exploratory view of indicators or breakdown

Reports on a table - displays information about the current state of platform

Performance Analytics - create dashboards to visualize data over time & report on KPIs and metrics, and increase quality

[(Read) Performance Analytics compared to Reporting]()

Custom arrangement of widgets: create a story with data to be shared

[(Read) Performance Analytics Concept]()

Dashboards

- Responsive (requires the activation of Performance Analytics) vs Non-responsive (default setting)
- Create & edit widgets directly from the dashboard
- Easily share the dashboard with stakeholders
- Set dashboards as a homepage so you can access information you frequently need
- Easily share dashboards with other users from the integrated sharing pane

Read More: Dashboards Overview | ServiceNow Documentation

Lab: Notifications

Complete Lab: Reporting in your PDI

Active Recall

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

Knowledge Management

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Learning Objectives

- Discuss the benefit of knowledge management to assist learners more effectively
- Articulate the knowledge article submission and review process
- Identify knowledge article collaboration options such as rate, mark helpful, comment, and ask questions
- Search knowledge base information quickly by using categories
- Create knowledge articles by importing word documents

Knowledge Management Defined

- Knowledge Management supports users to **create, categorize, review, approve, and browse** important information, as well as provide feedback in a centralized location shared by the organization. This enables users to troubleshoot their incidents on their own before submitting them
- Each organization has their own Knowledge Base (KB), which is managed by one or more Knowledge Manager(s).
- Required roles: **admin or knowledge_admin**
- Navigate to **Self-Service > Knowledge** in the Knowledge homepage to browse knowledge articles organized by Knowledge Base, Category, Featured Content, and popular articles

Read More: Knowledge Management & Knowledge Management V3 Homepage | Servicenow Documentation

Knowledge Base & Category

- Knowledge articles within a knowledge base are grouped by **category.**

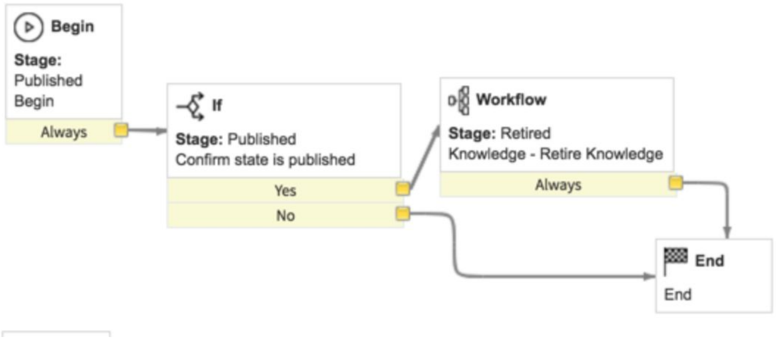
- These categories can help you define the knowledge base taxonomy, and locate articles within that knowledge base quickly.

- Knowledge Managers can define knowledge categories to be pre-populated & knowledge contributors can select, add, or edit categories based on their roles

Read More:

- Select a Knowledge Article Category | ServiceNow Documentation
- Knowledge Management Roles | ServiceNow Documentation

Knowledge Base: Workflows



The publishing & retirement processes for a knowledge article follows workflows defined for the knowledge base that the article belongs to.

You can assign different workflows to each Knowledge Base by using the default workflows or create your own

Examples of Default Knowledge Workflows:

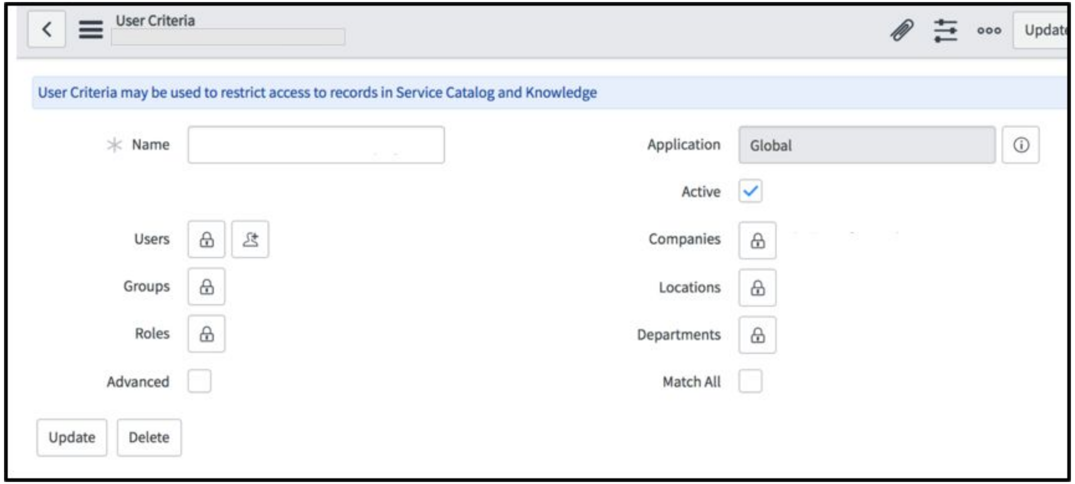
- Knowledge - Approval Publish
- Knowledge - Approval Retire
- Knowledge - Instant Publish
- Knowledge - Instant Retire
- Knowledge - Publish Knowledge
- Knowledge - Retire Knowledge

Read More: Knowledge Workflow | ServiceNow Documentation
Image Source: Retire a Knowledge Article | ServiceNow Documentation

Knowledge Security: Control Access through User Criteria

You specify **User Criteria** for a knowledge article to control different levels of access to the knowledge article (e.g., read, create, write, and retire knowledge articles)

- **canRead**
- **cantRead**
- **canContribute**
- **cantContribute**



(Note)

1. Several user criteria records can be applied to knowledge content
2. User criteria is applied at the Knowledge Base level

Read: Control access at the knowledge article level through user criteria| [ServiceNow Documentation]

Activity Time!

Complete Lab: Knowledge Management

Active Recall

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