

# 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

# Notifications Overview

# 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"

The screenshot shows the 'When to send' tab selected in the ServiceNow Notifications configuration. The 'Send when' dropdown is set to 'Record inserted or updated'. The 'Weight' is set to 0. There are checkboxes for 'Inserted' and 'Updated'. Below these are buttons for 'Add Filter Condition' and 'Add "OR" Clause'. There are also dropdowns for '-- choose field --', '-- oper --', and '-- value --'. At the bottom, there is an 'Advanced condition' section with a list of icons and a table with one row.

- 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** )



# Configuring notifications: Use dot-walking

Dot-walking gathers information from tables through reference fields

The screenshot shows a configuration interface with two main columns: 'Available' and 'Selected'. The 'Available' column contains a list of fields: 'Approval set', 'Assigned to [+]', 'Assignment group [+]', 'Business duration', 'Business resolve time', 'Caller [+]', and 'Category'. The 'Assigned to [+]' field is highlighted with a grey background. To the right of this list is a vertical stack of four buttons: a green-bordered button with a '+' sign, a button with a right-pointing arrow '>', a button with a left-pointing arrow '<', and an empty button. A black callout box with the text 'Expand Item' points to the '+' button. The 'Selected' column contains the text '--None--'. To the right of the 'Selected' column is another vertical stack of three buttons: a lock icon, an up arrow, and a down arrow. A red arrow points from the 'Caller [+]' field in the 'Available' column to the text 'Identify recipient: Users/Groups in fields' located below the interface.

Available		Selected
Approval set		
Assigned to [+]	+	--None--
Assignment group [+]	>	
Business duration	<	
Business resolve time		
Caller [+]		
Category		

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

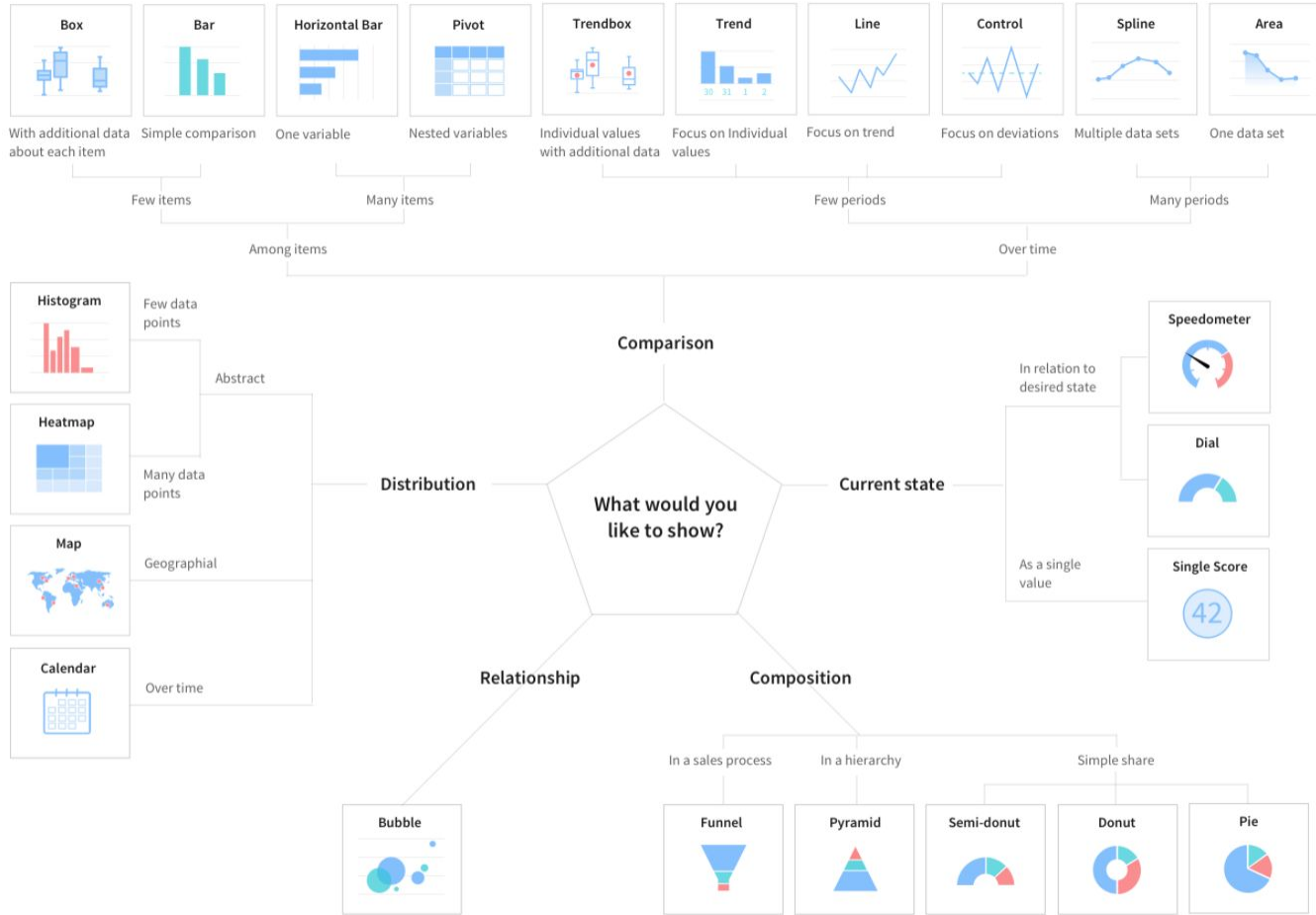


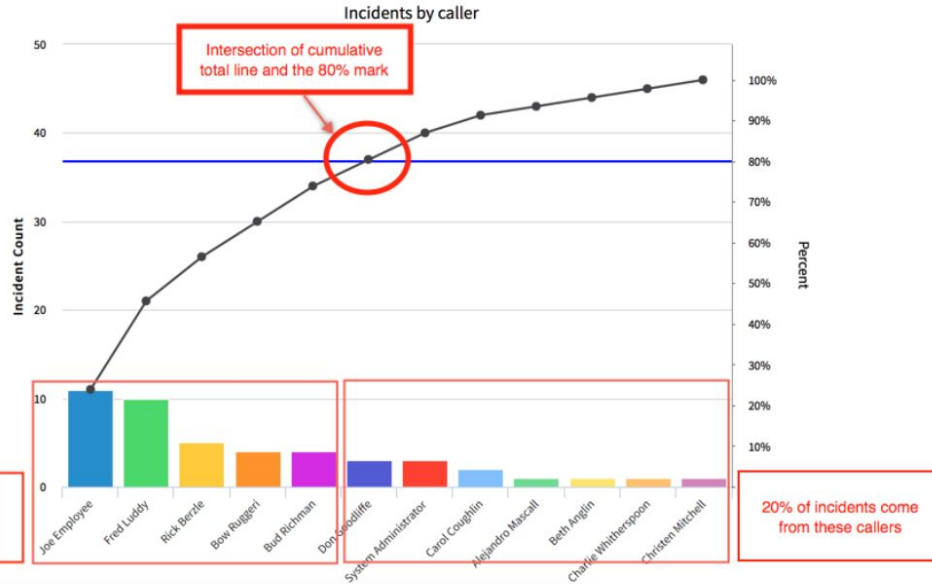
Image Source: [Creating Reports | ServiceNow Documentation](#)



# Example of a Chart: Pareto

Table: Incident [incident]

All



Contains both bars and a line graph:

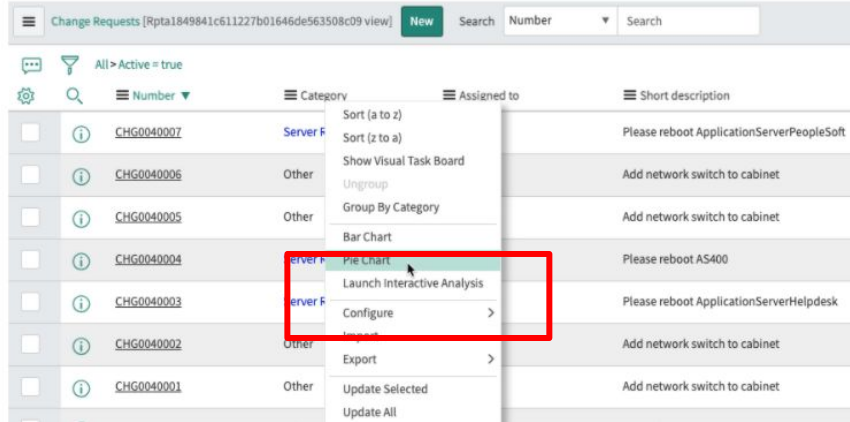
**Bars:** display the data in descending order from left to right

**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



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

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

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

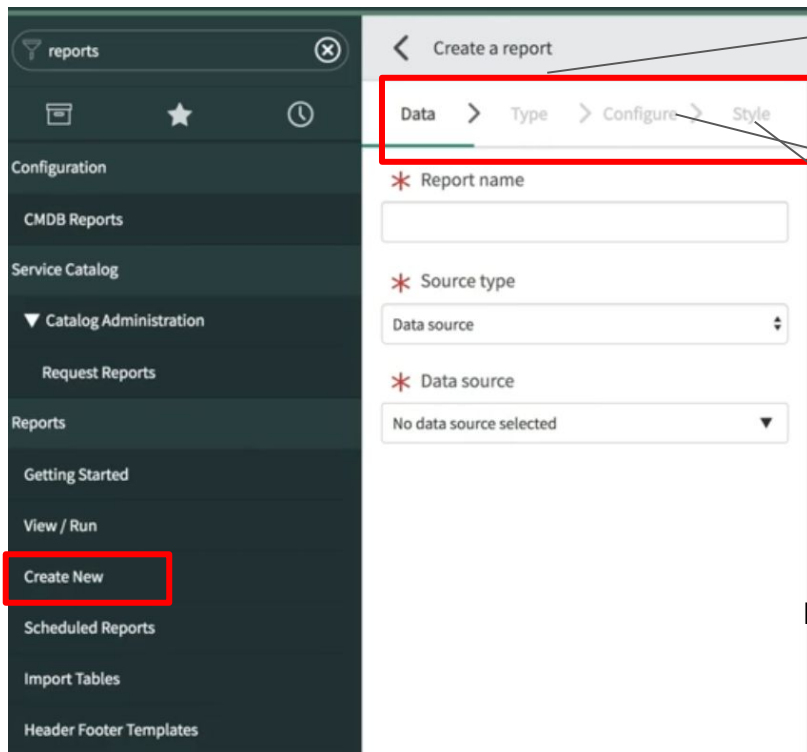
Visible to only  
specific groups

Available to  
everyone

Read More: [Sharing a Report](#) | ServiceNow Documentation



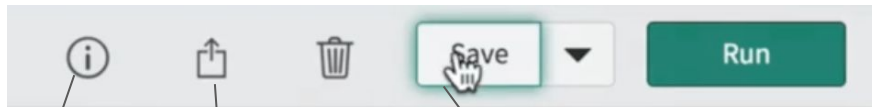
# Report Designer



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

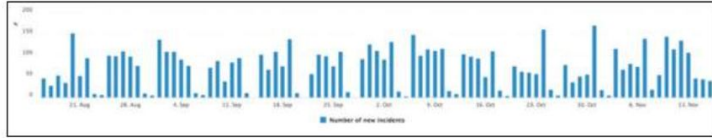


Image Source: ServiceNow Fundamentals @Now Learning

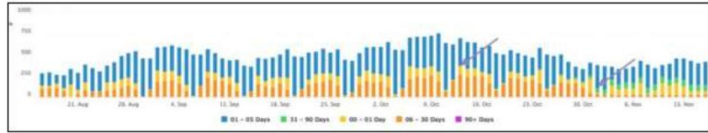
For more detail, read : [Create a report visualization](#)

# Reports & Performance Analytics

## Number of New Incidents



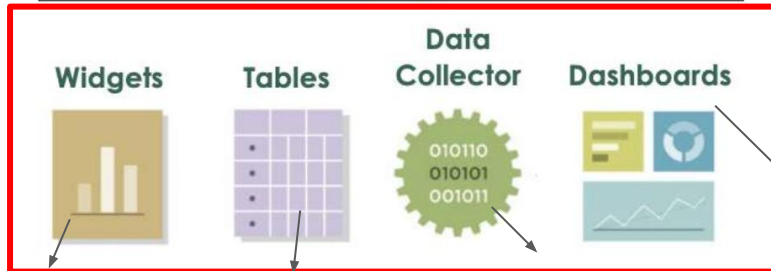
## Open Incidents by Age



**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](#)



Saved view of indicator or breakdown

Indicator source

Exploratory view of indicators or breakdown

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

# 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

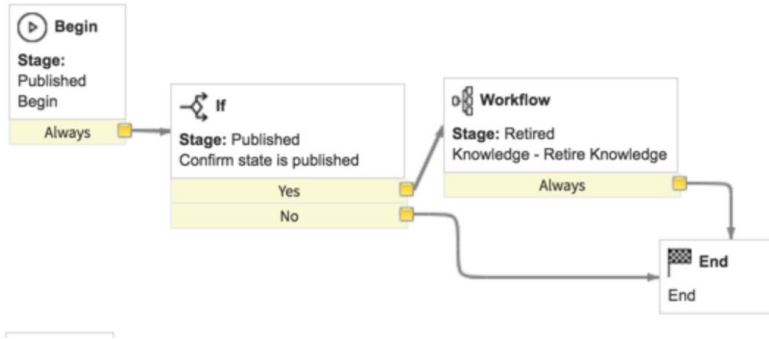
- Knowledge articles within a knowledge base are grouped by **category**.
- These categories can help you define the knowledge base taxonomy, and locate articles within that knowledge base quickly.
- Knowledge Managers can define knowledge categories to be pre-populated & knowledge contributors can select, 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





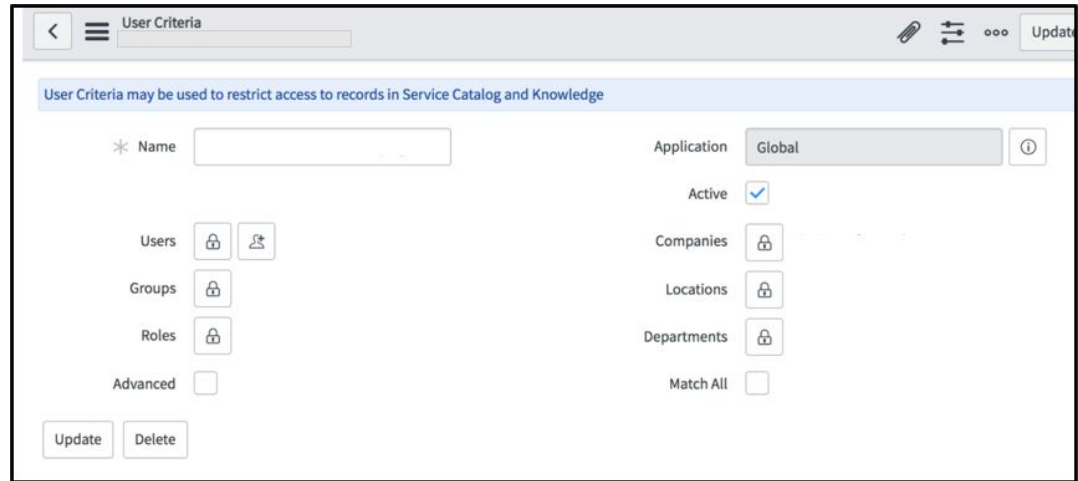
# Knowledge Security: Control Access through User Criteria

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



The screenshot shows the 'User Criteria' configuration page in ServiceNow. At the top, there is a header bar with a back arrow, a menu icon, the title 'User Criteria', and an 'Update' button. Below the header, a blue banner states: 'User Criteria may be used to restrict access to records in Service Catalog and Knowledge'. The main form area contains several fields and controls:

- Name:** A text input field with a '\*' icon on the left and a search icon on the right.
- Application:** A dropdown menu currently set to 'Global' with an information icon on the right.
- Active:** A checkbox that is checked.
- Users:** A button with a lock icon and a user icon.
- Groups:** A button with a lock icon.
- Roles:** A button with a lock icon.
- Advanced:** A checkbox that is unchecked.
- Companies:** A button with a lock icon.
- Locations:** A button with a lock icon.
- Departments:** A button with a lock icon.
- Match All:** A checkbox that is unchecked.

At the bottom left of the form, there are two buttons: 'Update' and 'Delete'.

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*

