Servicenow HandBook

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WEEK 1

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What is ServiceNow?

ServiceNow is a cloud-based platform that transforms IT service delivery, enabling businesses to solve problems efficiently.

Global Presence: ServiceNow has over 17,000 employees worldwide, recognized as a top workplace.

Company History: Founded in 2003, ServiceNow was initially called Glidesoft before rebranding in 2006.

Leadership: Bill McDermott, the CEO, previously led SAP, enhancing ServiceNow's strategic vision.

Motivation: Fred Luddy started ServiceNow to make IT services intuitive, addressing frustrations with traditional IT models.

Cloud Platform: ServiceNow operates as a cloud-based application platform, supporting various business workflows.

Custom Solutions: Users can create tailored workflows and applications, enhancing operational efficiency.

Data Centers: The platform's infrastructure includes global data centers, ensuring reliability and security.

Key Insights

Employee Satisfaction: ServiceNow's recognition as a top employer reflects its positive work culture, crucial for attracting talent and driving innovation.

Business Transformation: The platform's focus on enabling non-IT staff to manage IT services promotes collaboration and efficiency, shifting IT from a cost center to a strategic asset.

Innovation Recognition: Being named number one on Forbes' most innovative companies list highlights ServiceNow's commitment to continuous improvement and adaptability in a changing market.

Robust Infrastructure: ServiceNow's cloud-based architecture supports scalability and performance, essential for large enterprises facing complex challenges.

User Empowerment: By allowing users to build their own solutions, ServiceNow fosters innovation and responsiveness to unique business needs.

Global Reach: ServiceNow's widespread data centers enhance its reliability, providing customers with consistent service across different regions.

Legacy and Vision: The founding vision of simplifying IT processes remains a driving force, positioning ServiceNow as a leader in the IT service management space.

ServiceNow Platform Overview

- Overview of Now Platform architecture and functionalities.
- Introduction to ServiceNow's multi-instance architecture for better control.
- Explanation of three primary user interfaces: Now Platform UI, mobile apps, and Service Portal.
- Discussion on role-based access, users, groups, and permissions.
- Overview of user authentication methods, including single sign-on and multi-factor authentication.
- Insights into Fred Luddy's vision for ServiceNow and its growth.
- Introduction to the next video on setting up a personal ServiceNow instance.

Key Insights

Application Platform as a Service (aPaaS): ServiceNow combines IaaS, PaaS, and SaaS, offering a holistic cloud solution that simplifies application development and management. This integration is essential for organizations looking for comprehensive IT solutions.

Multi-instance Architecture: Unlike typical cloud services that intermix data, ServiceNow's architecture ensures that each customer has a separate instance, enhancing security, control, and customization during upgrades.

Robust Application Categories: ServiceNow categorizes applications into IT, Employee, Customer, and Creator workflows, providing a structured approach to managing various business processes effectively.

Role-Based Access Control: Understanding users, groups, and roles is crucial for managing permissions within ServiceNow, ensuring that employees access only the necessary information, which enhances security and operational efficiency.

Diverse Authentication Methods: ServiceNow offers various authentication options, including local and external methods like LDAP and OAuth, ensuring flexibility and security for user access.

Fred Luddy's Vision: The founder's motivation to empower business users with straightforward technology highlights the platform's user-centric design, making it more intuitive for non-technical stakeholders.

Setting Up a Personal Instance: The promise of a hands-on experience in future videos will facilitate practical learning, enabling users to apply concepts directly on their own ServiceNow instances.

ServiceNow User Interface Overview

The ServiceNow UI is a web-based interface for accessing the Now Platform, focusing on screen layout, elements, and common tools for effective navigation.

- Web-Based Interface: The ServiceNow UI serves as the primary access point for users.
- Screen Layout: Key elements include the banner frame, application navigator, and content frame.
- Global Search: Users can search the entire instance for records using keywords.
- Connect Chat: Integrated chat tool allows real-time communication with other users.
- System Settings: Customize the UI according to user preferences without affecting others.
- Favorites: Users can bookmark frequently accessed applications and modules for easy navigation.
- History Tracking: ServiceNow keeps track of recent activities, allowing users to revisit previous modules easily.

Key Insights

User-Centric Design: The ServiceNow UI is designed with user needs in mind, facilitating easy access to essential tools and features, enhancing productivity.

Certification Preparation: Knowledge of UI elements is crucial for certification success, as the exam format relies on understanding specific terminology.

Navigation Flexibility: The application navigator provides an efficient way to access applications and modules, with filtering options to streamline the user experience.

Customization Options: System settings enable users to personalize their experience, which can improve usability and comfort while navigating the platform.

Impersonation Feature: This tool allows support staff to view the platform from another user's perspective, improving troubleshooting and support efficiency.

Data Organization: The ability to categorize favorites and utilize history ensures that users can efficiently manage their workflow and access relevant information quickly.

Continuous Learning: Regular practice within the ServiceNow instance helps reinforce knowledge of the UI, making users more adept at navigating the platform over time.

ServiceNow Branding Overview

- Branding: Customize the ServiceNow user interface with your company's colors and logo.
- Guided Setup: Use wizard-like tools for easy branding configuration.
- User Comfort: Personalized branding enhances user confidence and comfort.
- Welcome Page: Add customized messages for users on the login screen.
- System Configuration: Modify settings like time zones, date formats, and banner text.
- ITSM Focus: Branding is primarily applied through IT Service Management guided setup.
- Future Videos: Upcoming lessons will cover more features like lists and filters.

Key Insights

Importance of Branding: Customizing the interface fosters a sense of ownership among users, increasing their acceptance and usage of the platform. This can lead to better engagement with the tools provided.

Guided Setup Wizards: ServiceNow's guided setup simplifies the branding process, allowing administrators to implement changes efficiently without deep technical knowledge.

User Experience: A familiar interface can significantly enhance the user experience, making users feel more at home and reducing the learning curve associated with new software.

Customization Options: Users can personalize various elements, such as colors and logos, reinforcing corporate identity and improving user satisfaction.

Welcome Page Significance: The welcome page is crucial for user engagement; it provides an opportunity to communicate key messages or updates right at the login point.

Adoption Rates: Effective branding strategies can lead to quicker adoption of ServiceNow tools, as users are more likely to embrace a platform that aligns with their company's identity.

Future Learning: Continued exploration of ServiceNow's features, like lists and filters, will provide a deeper understanding of maximizing the platform's capabilities.

ServiceNow Lists and Filters

ServiceNow's list and filter functionalities are essential for navigating and managing data across various tables, enhancing user experience.

- Lists: ServiceNow displays database tables through list views for easy data access.
- Filters: Users can filter and sort records to find relevant information quickly.
- List Control: Customizable views and filters can be saved for future use, benefiting all users.
- Grouping: Data can be grouped by specific columns for better organization and analysis.

- Activity Stream: Users can track changes and activities related to records through an activity stream.
- Context Menus: Multiple context menus facilitate quick actions on records and fields.
- Favorites: Users can add frequently accessed lists to their favorites for quick navigation.

Key Insights

List Views: The list view interface is designed for intuitive navigation, allowing users to manage multiple records effectively. This helps in enhancing daily workflows.

Search Functionality: The robust search capabilities, including wildcards, enable users to pinpoint specific records, streamlining data retrieval processes.

Saved Filters: Creating saved filters fosters collaborative efforts, as these settings apply to all users, ensuring consistency in data visibility and reporting.

Visual Data Representation: The ability to create visual task boards and charts allows users to quickly grasp data trends and patterns, supporting decision-making.

Customization Options: Personalization tools empower users to tailor their list views without affecting others, enhancing individual productivity.

Activity Tracking: The activity stream feature provides a historical view of changes, fostering accountability and transparency in record management.

Contextual Actions: Context menus offer a range of actions directly related to records, making it easier for users to perform tasks efficiently.

Forms in ServiceNow

Forms in ServiceNow are essential for managing records, and understanding them is crucial for certification and effective use.

- Forms are vital for viewing and managing records in ServiceNow.
- Each form standardizes layout, including headers and fields.
- Users can create, save, and modify records using various options.
- Multiple form views cater to different user needs and preferences.
- Templates streamline data entry for frequently used records.
- UI policies can dynamically show or hide fields based on conditions.
- Admins have tools for creating and customizing form views.

Key Insights

Standardization of Forms: ServiceNow's standardized form layout promotes a consistent user experience, making it easier for users to adapt to different forms. This consistency helps in training new users and ensures that they can quickly learn to navigate the system.

Data Entry Templates: Templates enhance efficiency by pre-filling common fields, reducing repetitive tasks. This feature is particularly beneficial for users who frequently create similar records, saving time and minimizing errors.

User-Specific Views: The ability to customize form views allows different roles to access relevant information without clutter. This customization ensures that users focus on what's important for their tasks, improving productivity.

Reference Fields: Reference fields pull data from other tables, reinforcing the relational database structure of ServiceNow. This capability allows users to maintain data integrity and ensures that relationships between records are preserved.

Form Management Tools: Admins have access to powerful tools for creating and modifying forms, enabling them to tailor the user experience to meet organizational needs. This flexibility supports continuous improvement in workflows.

Dynamic Field Behavior: UI policies enhance user experience by managing field visibility based on user input. This feature ensures that users are only presented with relevant fields, reducing confusion and errors during data entry.

Saving and Submitting Changes: Understanding the difference between saving and submitting is crucial. Users must actively manage their data entry process, which ensures that changes are intentional and reviewed before finalization.

A Hands-on ServiceNow Tool Demo

Explore ServiceNow through a hands-on demo, showcasing its features and user interface, and learn how to set up your own instance.

- Hands-On Demo: Experience ServiceNow's capabilities through a live demonstration.
- User Interface: Familiarize yourself with the Next Experience user interface.
- Application Access: Discover various applications available in ServiceNow.
- Knowledge Base: Access and create knowledge articles for user guidance.
- Workflows: Understand the four primary workflows: IT, Employee, Customer, and Creator.
- Lists and Forms: Learn how to work with lists and forms for efficient data management.
- Developer Program: Get a personal developer instance to explore and learn more about ServiceNow.

Key Insights

Hands-On Learning: Engaging with the platform directly provides a deeper understanding of its functionalities, enhancing user experience.

Intuitive Interface: The Next Experience UI simplifies navigation and interactions, making it easier for users to access essential tools and applications.

Knowledge Management: The Knowledge application fosters collaboration and self-service, empowering users to find solutions independently.

Comprehensive Workflows: ServiceNow's division into workflows addresses specific organizational needs, ensuring relevant tools are available for each group.

Efficient Data Handling: Mastering lists and forms is crucial for effective data management within ServiceNow, streamlining operations and decision-making.

Developer Opportunities: The ServiceNow developer program offers valuable resources for individuals seeking to expand their skills and capabilities on the platform.

Continuous Learning: With numerous training and certification options, users can continually enhance their expertise and stay updated on ServiceNow's evolving features.

Introduction to Importing Data in ServiceNow

- Introduction to data import in ServiceNow
- Components: Data sources, import sets, transform maps
- Understanding the intermediary staging table
- Staging table vs. import set table terminology
- ServiceNow automates staging table creation
- Process overview: source, staging, and target entities
- Next focus: Creating a data source

Key Insights

Data Entities: Importing data involves a source entity (where data comes from) and a target entity (where data goes). Understanding these entities is crucial for successful data management.

Staging Table Concept: ServiceNow introduces a staging table as an intermediary, simplifying the import process. This table is automatically created when an import starts, enhancing automation.

Terminology Clarity: The series will consistently use the term "staging table" for clarity, aligning with ServiceNow's terminology while simplifying user comprehension.

Automated Processes: The automation of the staging table's creation alleviates manual effort, allowing users to focus on data configuration rather than setup.

Three-Step Process: The data import process consists of three key steps: source data preparation, staging table interaction, and final data loading into the target system.

Future Topics: The next video will delve into creating a data source, an essential first step in the import process, laying the groundwork for understanding subsequent components.

Importance of Understanding Imports: Grasping the import process is vital for effective data management in ServiceNow, enabling smoother operations and better data integrity.

Creating a Data Source in ServiceNow

- Data Source Overview: Understand the concept of data sources in ServiceNow.
- Staging Table: Learn about the intermediary staging table used for data imports.
- Creating a Data Source: Step-by-step guide on creating a data source record.
- File Types: Different file types can be used as data sources, like CSV and Excel.
- MID Server: Importance of MID servers for accessing on-premises databases.
- Field Creation: Headers in your source file will create fields in the staging table.
- Test Import: Prepare for the next step of testing the import process.

Key Insights

Understanding Data Entities: Knowing the difference between the source and target entities is essential for successful data importation. This clarity helps in mapping data effectively.

Role of Staging Tables: Staging tables act as temporary storage for imported data, allowing for validation and processing before final data integration, which reduces errors.

Data Source Record Creation: Creating a data source record requires careful input of parameters, ensuring ServiceNow can connect to and pull data from various sources seamlessly.

File Types and Formats: Familiarity with different file formats (e.g., Excel, CSV) is crucial since the choice of format affects how data is processed and imported into ServiceNow.

Significance of MID Servers: MID servers serve as a bridge for ServiceNow to access data behind corporate firewalls. Understanding their setup is vital for data import from secured environments.

Dynamic Field Creation: The ability of ServiceNow to create fields based on source file headers enhances automation and streamlines data import processes, reducing manual setup.

Next Steps in Data Import: Preparing for the testing phase of the import process is important for ensuring data integrity and understanding the functionality of import sets in ServiceNow.

Understanding Import Sets in ServiceNow

- Created a data source record to specify import parameters.
- ServiceNow automatically generates a staging table for the import process.
- Testing the data source ensures the connection and staging table creation.
- Successfully loaded data from the data source into the staging table.
- Each import run is recorded in the import set table for tracking.
- Staging tables hold data until it's moved to the target table.
- Future steps involve transferring data from the staging table to the target table.

Key Insights

Data Source Creation: Establishing a data source is critical as it defines how ServiceNow connects to external data and the parameters for importing. This step sets the foundation for a successful data import process.

Staging Table Role: The staging table acts as an intermediary holding data before it is finalized into the target table. This allows for data validation and management before permanent storage.

Testing Mechanism: ServiceNow includes a testing feature for data sources, ensuring that the connection is valid and the staging table is created correctly. This reduces errors during the import process.

Record Management: Each import run generates a unique identifier in the import set table, allowing for easy tracking and management of multiple data imports. This is essential for maintaining data integrity.

Data Import Process: The series of steps taken from data source creation to staging table population illustrates a structured approach to data import. Understanding this flow is vital for efficient data management.

Dual Import Handling: Importing the same data multiple times showcases ServiceNow's capability to handle duplicate entries while maintaining a clear reference to each import set, which helps in auditing and troubleshooting.

Next Steps: Understanding the relationship between staging tables and target tables is crucial as it lays the groundwork for data finalization processes. Preparing for the next steps ensures a smooth transition of data into production use.

ServiceNow Transform Maps & Field Maps

- ServiceNow simplifies task management for organizations.
- Tasks are records in a core database table.
- Common task types include incidents, changes, and problems.
- Assignment rules automate task distribution.
- Collaboration tools enhance teamwork on tasks.
- Visual task boards offer a graphical overview of tasks.
- Efficient task management drives business value.

Key Insights

Task Definition: In ServiceNow, tasks are essential records that represent work items, allowing organizations to streamline workflows effectively.

Hierarchical Design: The task table uses a hierarchical database structure, enabling specific task types to inherit common attributes while retaining unique characteristics.

Business Value: By defining and managing tasks, businesses can create repeatable processes, ensuring timely completion and accountability through assignment rules and SLAs.

Collaboration Features: Tools like user presence and real-time editing improve communication and efficiency, allowing multiple users to work on tasks simultaneously.

Visual Task Boards: These boards provide an intuitive way to visualize tasks, helping users identify bottlenecks and prioritize work effectively.

Assignment Automation: Assignment rules automate task assignments based on predefined conditions, reducing the manual effort in task distribution.

User Empowerment: Empowering users to manage their tasks through features like "My Work" and group task views enhances productivity and accountability within teams.

ServiceNow Incident Management Tutorial and Task Administration

- Understand the database model for effective reporting.
- Learn to create and manage various report types.
- Discover how to schedule and automate report emails.
- Share reports with users and groups easily.
- Add reports to dashboards for comprehensive data visualization.
- Explore key fields in the report table for customization.
- Prepare for CSA certification with practical reporting skills.

Key Insights

Data-Driven Learning: Emphasizing the importance of understanding the underlying data model enhances your ability to utilize ServiceNow effectively. This foundational knowledge supports better decision-making and reporting strategies.

Report Creation Methods: There are multiple ways to create reports in ServiceNow, including the application navigator, Studio, or from existing list views, enabling flexibility in how users interact with the platform.

Scheduling Reports: Automating report delivery via email ensures important data reaches stakeholders regularly, increasing operational efficiency and informed decision-making.

Sharing Capabilities: The ability to share reports with individual users or groups enhances collaboration and ensures relevant information is accessible to those who need it.

Dashboard Integration: Adding reports to dashboards allows for a consolidated view of data, facilitating better analysis and visibility of key performance indicators.

Understanding Report Fields: Familiarity with key fields in the report table, such as source type and grouping fields, provides users with the tools to create tailored reports that meet specific needs.

Certification Preparation: Mastering ServiceNow reporting capabilities is crucial for passing the CSA certification, reinforcing the importance of practical skills in real-world applications.

What is Low Code No Code Development?

Highlights

- Empowerment: Low code no code allows business professionals to solve problems independently.
- Collaboration: IT specialists and business users work together to enhance solutions.
- Breaking Barriers: Eliminates obstacles between business needs and tech solutions.
- User-Friendly Tools: Intuitive interfaces simplify complex IT tasks.

- Cost Efficiency: Reduces development costs and speeds up project delivery.
- Flexibility vs. Constraints: Simplified tools may limit customization options.
- Growing Opportunities: Businesses are increasingly adopting low code no code platforms.

Key Insights

Accessibility: Low code no code democratizes software development, enabling non-technical users to create applications, which fosters innovation across organizations.

Agility: The iterative approach of low code no code allows for rapid adjustments and improvements, leading to quicker time-to-market for solutions that meet evolving business needs.

Skill Development: Encourages business users to learn technical skills, bridging the gap between IT and business for improved collaboration and understanding.

Tool Limitations: While these tools simplify many processes, they can also constrain creativity by forcing users into predefined workflows and functionalities.

Team Dynamics: Stronger collaboration between IT and business teams leads to better outcomes, as both sides leverage their strengths for mutual benefit.

Security Considerations: As more users engage in development, maintaining security and governance becomes crucial to protect sensitive data and applications.

Job Evolution: IT roles may shift towards more strategic functions as low code no code empowers business users, but developers' skills remain essential for complex projects.