

# ServiceNow Platform & Development Fundamentals

## Overview

## #Week-1

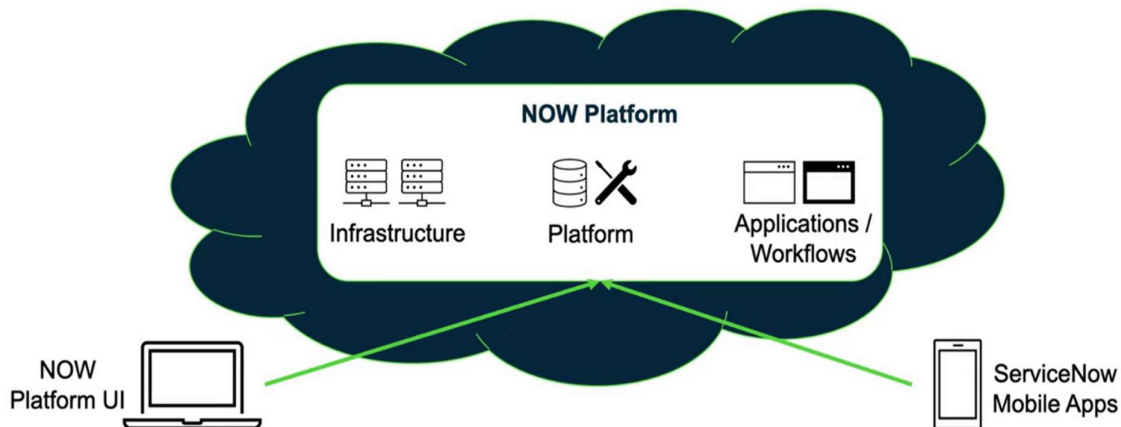
This document compiles my understanding of various key topics related to ServiceNow, covering its purpose, platform architecture, user interface, branding, data management, incident handling, reporting, and low-code/no-code development. These insights are based on detailed study and practical exploration of the platform.

## Learning Objectives

### 1. What is ServiceNow - Purpose, Platform, and Infrastructure

ServiceNow is a versatile cloud-based platform designed to help organizations automate and streamline IT service management (ITSM) and various other business processes. The platform's primary purpose is to enhance efficiency, improve service delivery, and provide a single system of record for operations. ServiceNow's infrastructure is built to be scalable and flexible, offering robust tools that can be customized to meet the needs of any business.

### Cloud-based Application Platform as a Service (APaaS)



## Applications:

- Incident Management – Manage & Resolve incident quickly.
- Problem management – Identifies the root cause of the incidents.
- Service Catalog – Provides a user-friendly interface for employees.
- Knowledge Management – Allows organizations to create, share, and manage knowledge.
- Workflow Automation – Automates repetitive Tasks & Processes.
- Reporting & Analytics – Offers robust reporting tools & dashboards to analyze the metrics.

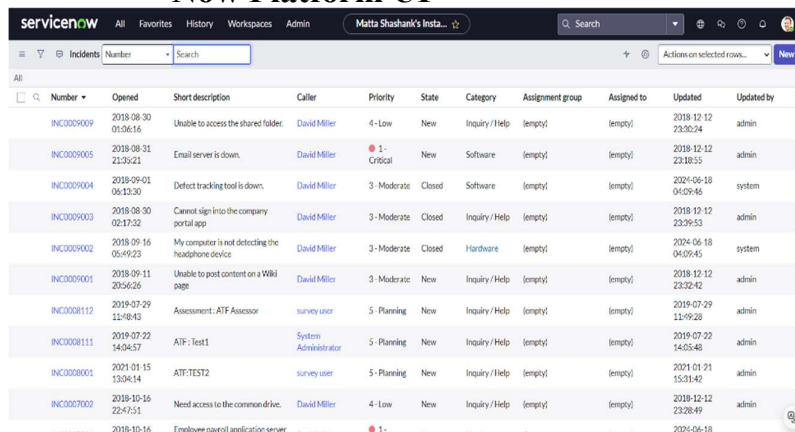
## 2. ServiceNow Platform Overview: Architecture, Applications and Workflows

The ServiceNow platform is architected to support a wide range of applications and workflows. At its core, the platform includes a central data repository that integrates with various applications, enabling seamless data flow and process automation. Key components of the architecture include:

- **Applications:** Pre-built and customizable applications that address specific business needs.
- **Workflows:** Automated workflows that guide processes from initiation to completion.
- **User Interfaces:** Intuitive interfaces that make navigation and operation straightforward.
- **Role-Based Access and Authentication:** Security measures that control access based on user roles.
- **Backups & Security:** 4 weekly full data backups.

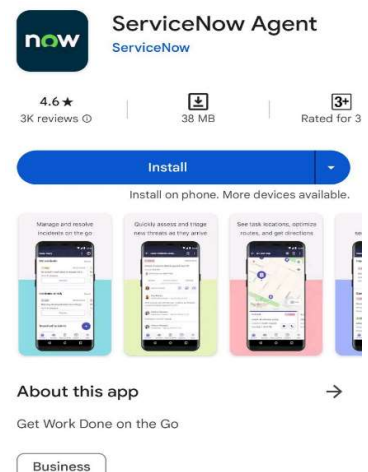
## User Interfaces

### Now Platform UI



Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC000909	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-12 23:30:34	admin
INC000905	2018-08-31 21:39:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)	2018-12-12 23:18:55	admin
INC000904	2018-09-01 06:13:30	Defect tracking tool is down.	David Miller	3 - Moderate	Closed	Software	(empty)	(empty)	2020-06-18 04:09:46	system
INC000903	2018-08-30 02:17:32	Cannot sign into the company portal app	David Miller	3 - Moderate	Closed	Inquiry / Help	(empty)	(empty)	2018-12-12 23:39:53	admin
INC000902	2018-09-16 05:49:23	My computer is not detecting the headphone device	David Miller	3 - Moderate	Closed	Hardware	(empty)	(empty)	2020-06-18 04:09:45	system
INC000901	2018-09-11 20:56:26	Unable to post content on a Wiki page	David Miller	3 - Moderate	New	Inquiry / Help	(empty)	(empty)	2018-12-12 23:32:42	admin
INC0008112	2019-07-29 11:48:43	Assessment: ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-29 11:49:28	admin
INC0008111	2019-07-22 14:04:57	ATF - Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 14:05:48	admin
INC0008001	2021-01-15 13:04:14	ATF-TEST2	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2021-01-21 15:31:42	admin
INC0007002	2018-10-16 22:47:51	Need access to the common drive.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-12 23:28:49	admin
INC0007001	2018-10-16	Employee payroll application server	David Miller	1 - Critical	New	Hardware	(empty)	(empty)	2020-06-18	admin

### Mobile App



**ServiceNow Agent**  
ServiceNow

4.6 ★  
3K reviews

38 MB  
Rated for 3+

**Install**

Install on phone. More devices available.

Manage and resolve incidents on the go. Quickly assess and resolve new threats as they arrive. See task instances, optimize routes, and get directions.

**About this app** →

Get Work Done on the Go

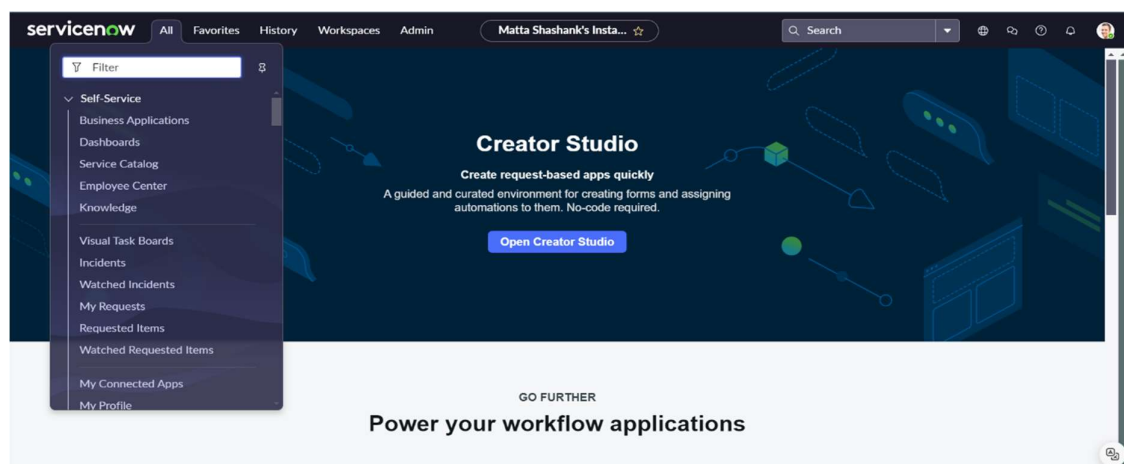
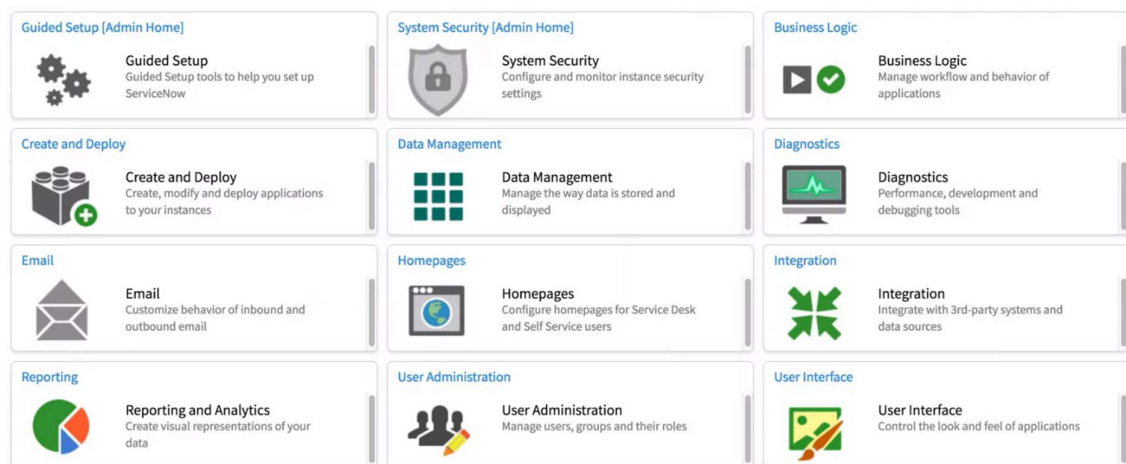
Business

### 3. ServiceNow User Interface Overview

The ServiceNow User Interface (UI) is designed for ease of use, allowing users to navigate the platform efficiently. Key elements include:

- **Global Search:** A powerful search tool enabling users to quickly find records, tasks, and information.
- **Connect Chat:** A real-time communication feature that facilitates collaboration among users.
- **Application Navigator:** A central hub for accessing all available applications within ServiceNow.
- **Favorites and History:** Tools that allow users to bookmark frequently used applications and track their activity history.

In addition, Access Control Lists (ACLs), UI policies, Business Rules, and Client Scripting play crucial roles in customizing the user experience and enforcing security.



## 4. ServiceNow Branding Overview

Branding in ServiceNow involves customizing the platform's look and feel to align with an organization's identity. This includes:

- \*Look & feel of the company

- **Company Guided Setup:** Tools to customize the ServiceNow interface according to company branding guidelines.
- **ServiceNow Portal:** A customizable front-end portal that provides users with access to services and information.
- **UI Builder:** A tool for creating and modifying user interfaces within the ServiceNow environment.

The screenshot displays the 'ITSM Guided Setup' interface in ServiceNow. The top navigation bar includes the 'servicenow' logo, user profile 'Matta Shashank's Insta...', and a search bar. The main content area shows a progress bar at 3% Complete. It features three sections: 'Company' (50% progress, 'Continue' button), 'Connectivity' (0% progress, 'Get Started' button), and 'Foundation Data' (0/7 Tasks completed). A sidebar on the left shows a sequence of setup steps.

The screenshot displays the 'Welcome Page Sections' configuration page in ServiceNow. The top navigation bar shows 'Welcome Page Sections' and a 'New' button. The main area contains a table with columns for 'Short description', 'Condition', 'Active', 'Display order', 'Published', and 'Updated'. Three sections are listed: 'About', 'Using', and 'More Information'. The 'About' section is selected.

	Short description	Condition	Active	Display order	Published	Updated
<input type="checkbox"/>	About \$!gs.getProperty('glide.product.na...		true	10	2005-06-28	2015-06-28 12:44:48
<input type="checkbox"/>	Using \$!gs.getProperty('glide.product.na...	gs.getSession().isLoggedIn() == true	true	20	2005-06-28	2009-07-16 16:07:33
<input type="checkbox"/>	More Information	gs.getSession().isLoggedIn() == true	true	30	2005-06-28	2009-07-16 16:06:12

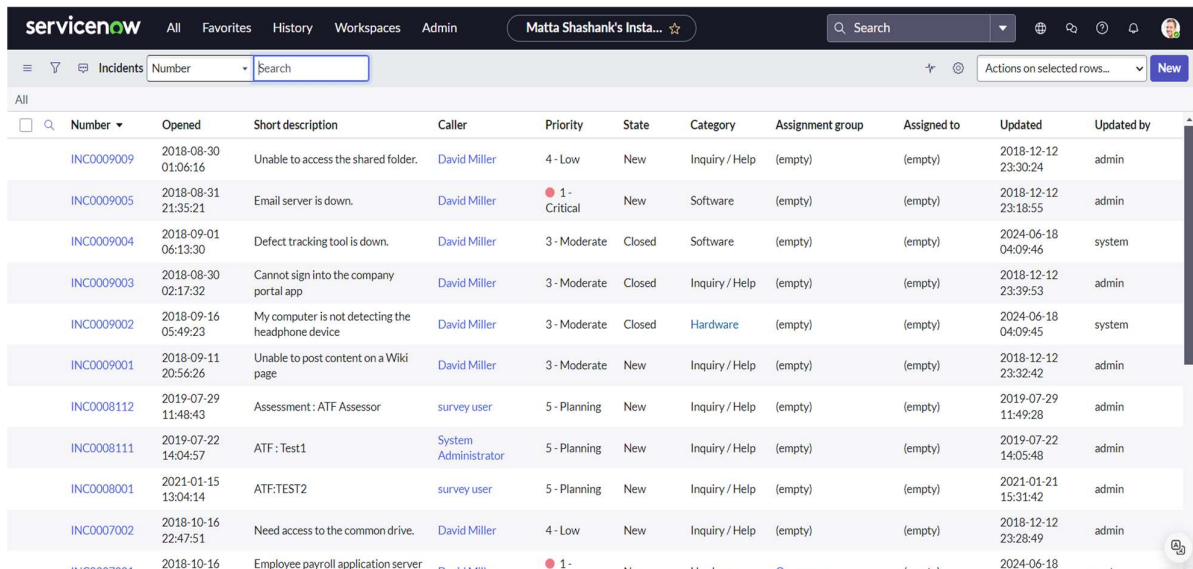
Related Links  
[Get Started](#)

# 5. ServiceNow Lists and Filters

ServiceNow Lists and Filters provide powerful data management capabilities. The list view interface allows users to:

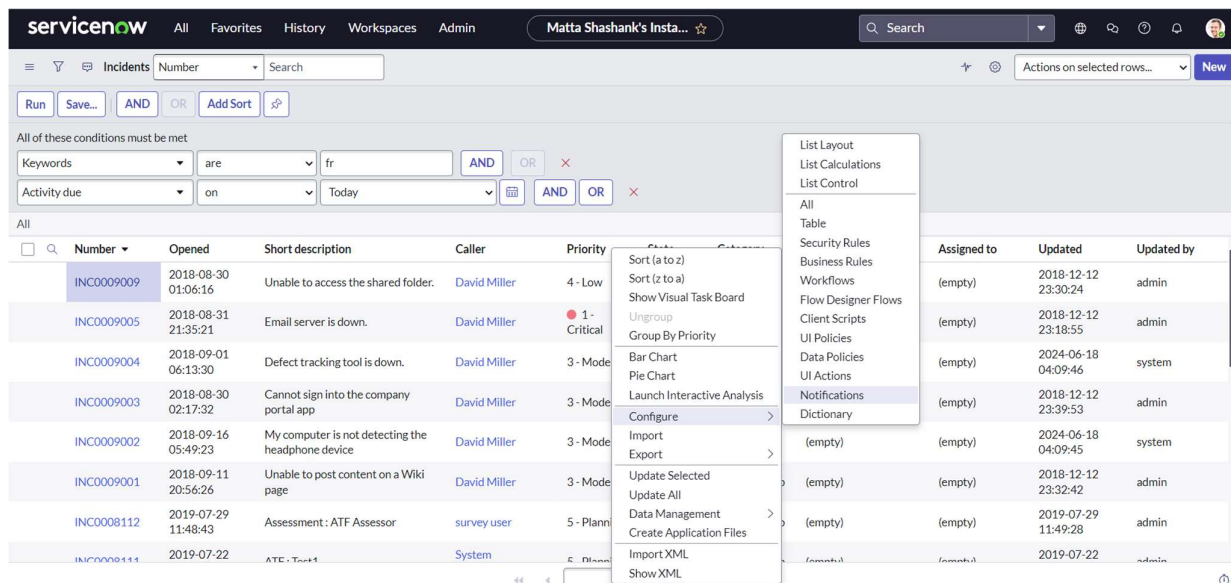
- **Manage Data:** Organize, sort, and display records efficiently.
- **Apply Filters:** Set filter conditions to narrow down data and focus on specific records.
- **List Controls:** Manage how lists are displayed, refreshed, and interacted with.

## Lists



Number	Opened	Short description	Caller	Priority	State	Category	Assignment group	Assigned to	Updated	Updated by
INC0009009	2018-08-30 01:06:16	Unable to access the shared folder.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-12 23:30:24	admin
INC0009005	2018-08-31 21:35:21	Email server is down.	David Miller	1 - Critical	New	Software	(empty)	(empty)	2018-12-12 23:18:55	admin
INC0009004	2018-09-01 06:13:30	Defect tracking tool is down.	David Miller	3 - Moderate	Closed	Software	(empty)	(empty)	2024-06-18 04:09:46	system
INC0009003	2018-08-30 02:17:32	Cannot sign into the company portal app	David Miller	3 - Moderate	Closed	Inquiry / Help	(empty)	(empty)	2018-12-12 23:39:53	admin
INC0009002	2018-09-16 05:49:23	My computer is not detecting the headphone device	David Miller	3 - Moderate	Closed	Hardware	(empty)	(empty)	2024-06-18 04:09:45	system
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INC0008112	2019-07-29 11:48:43	Assessment : ATF Assessor	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-29 11:49:28	admin
INC0008111	2019-07-22 14:04:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 14:05:48	admin
INC0008001	2021-01-15 13:04:14	ATF:TEST2	survey user	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2021-01-21 15:31:42	admin
INC0007002	2018-10-16 22:47:51	Need access to the common drive.	David Miller	4 - Low	New	Inquiry / Help	(empty)	(empty)	2018-12-12 23:28:49	admin
INC0007001	2018-10-16	Employee payroll application server	David Miller	1 - Critical	New	Hardware	(empty)	(empty)	2024-06-18	system

## Filters



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INC0008111	2019-07-22 14:04:57	ATF : Test1	System Administrator	5 - Planning	New	Inquiry / Help	(empty)	(empty)	2019-07-22 14:05:48	admin

## 6. Forms in ServiceNow

Forms in ServiceNow are used for data entry and record management. Key features include:

- **Standard Layout:** The default structure of forms used across the platform.
- **Form Field Types:** Various types of fields (e.g., text, date, choice) that can be used to capture data.
- **Customization Options:** Including saving changes, adding attachments, using form templates, and personalizing form views.

This screenshot shows the 'Incident' form in ServiceNow. The form is titled 'Incident INC0009009'. It contains several fields for data entry, including 'Number' (INC0009009), 'Caller' (David Miller), 'Category' (Inquiry/Help), 'Subcategory' (-- None --), 'Service', 'Service offering', 'Configuration item', 'Channel' (-- None --), 'State' (New), 'Impact' (3 - Low), 'Urgency' (2 - Medium), 'Priority' (4 - Low), 'Assignment group', and 'Assigned to'. The 'Short description' field contains the text 'Unable to access the shared folder.' and the 'Description' field contains 'Unable to access the shared folder. Please provide access.' Below the form, there is a 'Related Search Results' section with tabs for 'Notes', 'Related Records', and 'Resolution Information'. The 'Related Records' tab is active, showing fields for 'Parent Incident', 'Problem', 'Change Request', and 'Caused by Change'.

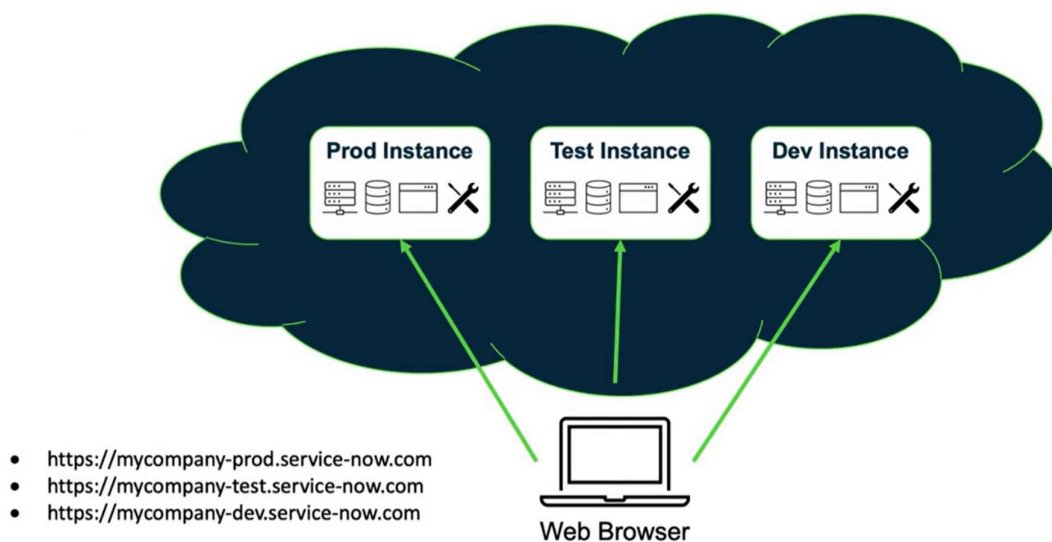
This screenshot shows the ServiceNow interface with the 'Incident - INC0009009' form. A dropdown menu is open, showing various actions such as 'Save', 'Add to Visual Task Board', 'Copy Incident', 'Create Incident Task', 'Create Outage', 'Create Problem', 'Create Request', 'Create Child Incident', 'Create Normal Change', 'Create Standard Change', 'Create Emergency Change', 'Refresh Impacted Services', 'Metrics Timeline', 'Follow on Live Feed', 'Analyze Access', 'Configure', 'Export', 'View', 'Create Favorite', 'Copy URL', 'Copy sys\_id', 'Show XML', 'History', and 'Reload form'. The form fields are visible in the background, and the 'Incident' form is titled 'Incident INC0009009'. The 'Short description' field contains the text 'Unable to access the shared folder.' and the 'Description' field contains 'Unable to access the shared folder. Please provide access.' The 'Related Search Results' section is also visible, showing tabs for 'Notes', 'Related Records', and 'Resolution Information'.



## 7. Hands-on ServiceNow Tool Demo

The Hands-on Tool Demo provided me with practical experience with the ServiceNow platform, covering:

- **Navigation:** Using the Next Experience UI, navigating the platform, and accessing applications.
- **Lists and Forms:** Working with list and form views, managing records, and using the ServiceNow database.
- **Knowledge Management:** Understanding how knowledge articles are managed and accessed within ServiceNow.
- **ServiceNow Instances**
  - . Production Instance
  - . Testing Instance
  - . Development Instance



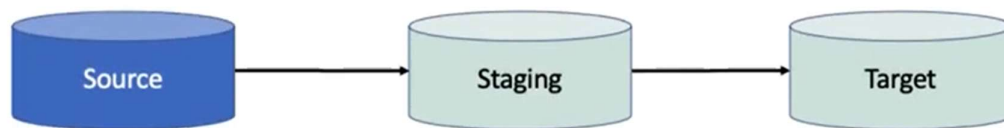
- **Workflows**

- IT Workflows: Supports internal IT functions
- Employee Workflows: Targeted at the needs of the employee
- Customer Workflow: Functions related to customers.
- Creator Workflow: To design and develop the ServiceNow Platform and operations support

## 8. Introduction to Importing Data in ServiceNow

Importing Data into ServiceNow is crucial for integrating external data sources. The process involves:

- **Creating Data Sources:** Setting up connections to external data sources.
- **Import Sets:** Staging data before it is transformed and moved into target tables.
- **Transform Maps:** Mapping data fields from the import set to the corresponding fields in the target table.



## 9. Transform Maps & Field Maps in ServiceNow

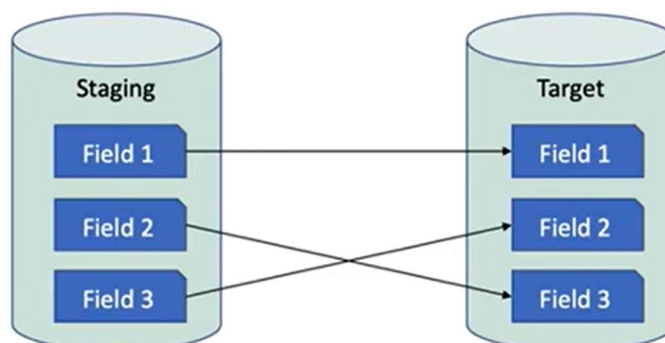
Transform Maps and field Maps are crucial components when importing data into the system. They help you define how external data should be mapped to existing ServiceNow tables and fields.

- **Transform Maps:** Transform Maps are used to map data from an import set table to a target table in ServiceNow.
- **Field Maps:** Field maps define the mapping of individual fields from the import set table to the target table within a Transform Map.

### UseCases:

**Data Migration:** When moving data from files to ServiceNow.

**Data Integration:** For integrating data from external sources or third-party applications.





# 10. Incident Management and Task Administration

Incident Management in ServiceNow is a key component of ITSM. It involves:

- **Incident Management:** It Manages the lifecycle of all incidents.
- **Incident States:** New, In Progress, On Hold, Resolved, Closed
- **Ticket Creation:** Logging incidents, problems, and changes.
  - \* **Detection & Logging**
  - \* **Classification & Categorizing**
  - \* **Diagnosis**
  - \* **Resolution**
  - \* **Closure**
- **Task Administration:** Assigning, tracking, and resolving tasks through collaborative tools like visual task boards.
- **Task Records**
- **Task Lifecycle:** Open, Work in Progress & Closed
- **Task Assignment:** Groups, Individuals
- **Notifications:** Alerts, Customizable v

The screenshot shows the ServiceNow web interface for Incident Management. At the top, there's a navigation bar with 'servicenow' logo and tabs for 'All', 'Favorites', 'History', and 'Workspaces'. A search bar is on the right. Below the navigation bar, the main header shows 'Incidents by Category' and a 'Guided Board' view. A filter bar allows searching by title or number and setting a 'Due By' date. A row of user avatars is visible, including Abraham Lincoln, Beth Anglin, Bud Richman, Charlie Whitherspoon, David Loo, Don Goodliffe, Fred Luddy, Howard Johnson, and ITIL User.

The main content area is a grid of incident cards. The columns are labeled 'Inquiry / Help 33', 'Software 13', and 'Hardware 11'. Each card displays an incident title, its status (e.g., 'Unassigned'), a user avatar, and a timestamp. A callout card is overlaid on the 'Software' column, showing an incident titled 'Can't log into SAP from my laptop today' with a user avatar and a timestamp.

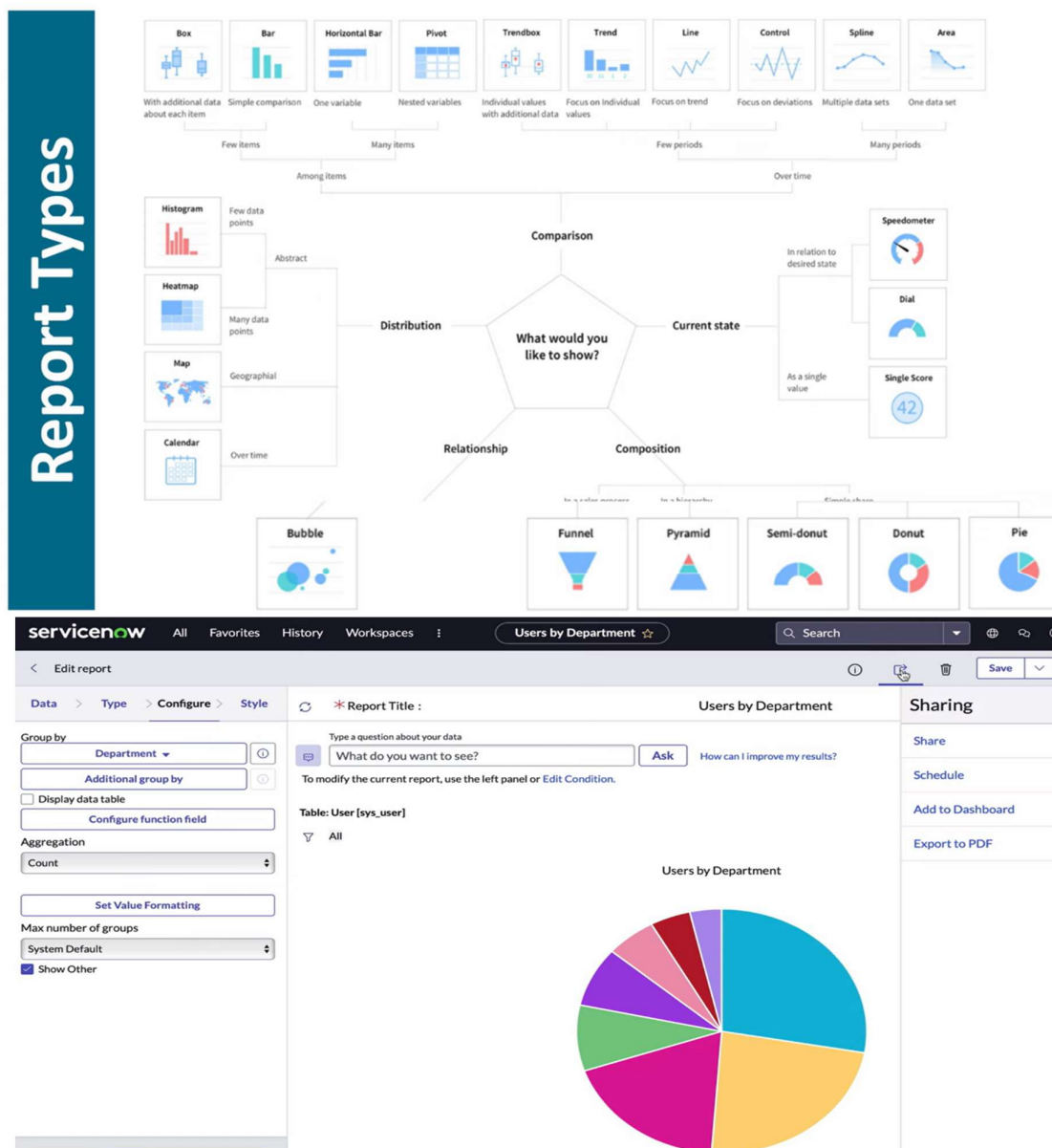
Category	Incident Title	Status	User	Timestamp
Inquiry / Help	Unable to access the shared folder.	Unassigned	AL	15h ago
	Sales forecast spreadsheet is READ ONLY	Unassigned	BR	36m ago
	SAP Sales app is not accessible	Unassigned	BR	5mo ago
	Having problems with Sales Tools perf...	Unassigned	LW	15h ago
Software	Defect tracking tool is down.	Unassigned	FL	5mo ago
	Missing my home directory	Unassigned	BR	5mo ago
	Forgot email password	Unassigned	BR	5mo ago
	Reset my password	Unassigned	LW	5mo ago
Hardware	This is my test hardware inc	Unassigned	AL	5mo ago
	The USB port on my PC stop	Unassigned	AL	5mo ago
	CPU load high for over 10 m	Unassigned	BR	5mo ago
	My computer is not detectin	Unassigned	Unassigned	5mo ago

# 11. ServiceNow Reporting

ServiceNow Reporting allows users to create, manage, and share reports that provide insights into the data stored within in the ServiceNow platform.

The platform offers:

- **Various Report Types:** Bar charts, Pie charts, and dashboards.
- **Report Management:** Tools for creating, sharing, and managing reports with users and groups.
- **Creating Reports:**
  1. Data Source Selection
  2. Filters
  3. Group By
  4. Aggregation
- Reports can be scheduled to run at regular intervals & automatically sent to specified users via g-mail.



## 12. Low Code / No Code Development

Low Code/No Code Development in ServiceNow allows users to create applications without extensive coding knowledge and automate workflows using visual tools.

### - App Engine Studio:

- Pre-built templates to create applications.
- Guided Development to build applications.
- To easily manage data, tables, fields

**-Flow Designer:** A no-code tool for automating processes across the ServiceNow.

- Triggers & Actions
- Pre-Built Actions

**-UI Builder:** Creates Workspaces and portals via drag-and-drop.

- Custom Interfaces
- Components

### -Use Cases:

- Faster Development
- Cost-Effective

