DIGITAL NURTURE 3.0 SERVICENOW LEARNINGS

WEEK 1 : ServiceNow Platform and Development Fundamentals

(DAY 5,6&7):

TOPICS COVERED:

1. A Hands-on ServiceNow Tool Demo

- Logging In,
- ServiceNow Next Experience UI,
- The Navigation Bar,
- ServiceNow Applications Overview
- The Application Navigator,
- The ServiceNow Store,
- Working with Lists and Forms
- Overview, List Views, Form
- Views, Knowledge
- Management in ServiceNow,
- The ServiceNow Database

1. Logging In
To start using ServiceNow, you first need to log in with your credentials. This typically involves entering your username and password on the login screen of your organization's ServiceNow instance.
After logging in there are several activities to do further and explore the menus to know about the tasks to be done and requirements to build an application ,
a.) Navigate the User Interface (UI)

- **Explore the Home Page:** The home page often provides a dashboard with quick access to commonly used features, reports, and widgets. It may include shortcuts to create new incidents, view open tasks, or access knowledge articles.

- **Use the Navigation Bar:** The navigation bar allows users to find different modules and applications. Users can browse or search for specific items using the application navigator.

- **Access the User Menu:** Check and update your profile, switch roles (if applicable), or log out using the user menu.

b.) Search for Information

- **Global Search:** Use the global search bar at the top of the screen to find records, incidents, knowledge articles, or other information across the platform. This is helpful for quickly locating specific items without navigating through different modules.

- **Filtered Search:** In specific modules, use the search and filter options to narrow down records based on criteria like status, assignment group, priority, etc.

c.) Work with Incidents, Requests, and Tasks
View and Manage Tasks: Access your assigned tasks, incidents, or requests
Create New Records: Depending on your permissions, you can create new incidents, service requests, changes, problems, or other records.

d.) Access Knowledge Management

- **Search Knowledge Articles:** Use the knowledge management feature to search for articles that provide solutions to common problems or answer frequently asked questions.

e.) Run and View Reports

- **Access Dashboards:** View dashboards that provide insights into various metrics, such as the number of open incidents.
- **Generate Reports:** Use predefined reports or create custom reports to analyze data and track performance.

f.) Access the ServiceNow Store

- **Explore Plugins and Applications:** Visit the ServiceNow Store to find and install new applications or plugins that extend the functionality of your instance. These may include third-party integrations, productivity tools, or industry-specific applications.

g.) **Notifications:** Receive notifications for task assignments, updates, approvals, and more, ensuring you stay informed about the status of ongoing work.

Before all this process firstly you have to create an instance by which you will get an URL so that you can directly copy paste in the browser and start logging in . The process of creating an instance is :

1. Sign Up for a ServiceNow Developer Account

- **Visit the ServiceNow Developer Site:** Go to the official ServiceNow Developer website.
- **Create an Account:** If you don't already have an account, you'll need to sign up. Click on the "Sign Up" button and fill out the registration form with your details such as name, email, and company information.
- **Verify Your Email:** After signing up, you'll receive a verification email. Click on the link in the email to verify your account.

2. Log In to the Developer Site

- **Access Your Account:** Once your account is verified, log in to the ServiceNow Developer site using your credentials.
- **Dashboard:** After logging in, you will be directed to your developer dashboard, where you can manage your instances and access various developer resources.

3. Request a New Instance

- **Navigate to the Instance Management Section:** On the developer dashboard, find the “Manage” section or look for an option like “Request Instance” or “Manage Instance.”
- **Select a Version:** ServiceNow periodically releases new versions (e.g., Tokyo, Utah, etc.).
- **Request the Instance:** Click the “Request Instance” button. ServiceNow will start creating a new instance for you. This process typically takes a few minutes.

  List View and Form views:

  list views and form views are different from each other the following is the process:

  how to create list view

  Steps

  1) Open problem table

  2) Configure list layout

  3) Click New View

  4) Give name

  5) then add your required fields for list view

  6) click save

  Configuring Form Layouts:

  1. To configure a **Form Layout**, you must first select a desired form.

  2. Right click on the form’s header.

  3. Hover over **“Configure”** and click on **“Form Layout”**.

ServiceNow Database:
You can go System Diagnostics -> Diagnostics Page in your instance and get all details under Database overview.
ServiceNow is built using Java and Tomcat web server running on Linux.
The CMDB is the ServiceNow database that stores information about all technical services. Within the CMDB, the support information for each service offering is stored in a Configuration Item (CI) specific to that service.

2.) Introduction to Importing Data in ServiceNow

- Import data into ServiceNow via integrations

Before integration we should know about the meaning of importing data

Importing data means pulling data from a source or entity and loading it to a target data entity

The import process has an intermediatary data entity between pulling and loading that is called as staging but the servicenow calls it as an import set table

So import data includes three steps:

- ✓ Source
- ✓ Staging
- ✓ Target

In the next stage we will get to know about integrations and how it is related to data source import.

3.) Creating a Data Source in ServiceNow :

- ✓ Integrations in ServiceNow start with the creation of Data Source,
- ✓ creating a Data Source record in ServiceNow to load data from some external data,
- ✓ collection and importing into the ServiceNow platform

To create a data source in ServiceNow:

1. Open the All menu in the main ServiceNow browser window
2. Select Reports > Administration > Report Sources
3. Click New
4. Configure the report source
5. Click Submit

load data process :

- ✓ To load data from a data source into a staging table, use the *All* menu to open **System Import Sets > Load Data**.

- ✓ Click the **Submit** button to load the data from the Excel file into the staging table.
- ✓ After the records are imported into the staging table, a *Progress* page appears
- ✓ Once data is loaded, click the **Create transform map** link in the *Next steps...* section to map data from the staging table to the target table.
  - To map fields from the import set table to target tables in ServiceNow, you need to create a transform map.
  - Navigate to **System Import Sets > Administration > Transform Maps**, click "New," and define how fields in the import set correspond to fields in the target table.

Run the Import

- Once the Data Source and Transform Map are configured and tested, you can perform the import operation.
- Use **System Import Sets > Load Data** to load data from the source and run the transform map to import it into the target table.

4.) Understanding Import Sets in ServiceNow

- How import sets are created and how they provide the ability to transform data and map individual fields to target tables.

Import Sets in ServiceNow are powerful for integrating external data into the platform. By using Data Sources, Import Set Tables, and Transform Maps, you can effectively import, transform, and map data to ensure it fits your needs, enhancing the overall data quality and process efficiency in your ServiceNow environment.

How Import Sets are Created

1. **Define a Data Source:** First, create a data source that specifies where the data is coming from (e.g., a CSV file, database, or web service).

2. **Load Data into Import Set Table:** Use the data source to load data into an Import Set Table. This table is temporary and holds the raw data that needs to be processed.

3. **Example: Importing Employee Data**
   a ServiceNow admin at a company, need to import employee data from a CSV file into the ServiceNow "User" table. The CSV file contains employee details such as First Name, Last Name, Email, and Department.

Step 1: Create a Data Source

- You start by creating a Data Source in ServiceNow that points to your CSV file containing the employee data.

Step 2: Load Data into an Import Set Table

- ServiceNow automatically creates an Import Set Table for this Data Source

  I kept it as : 'u_employee_import'

  load the data from the CSV file into this Import Set Table. Now, the table u_employee_import holds rows of employee data as read from the CSV file.

Step 3: Create a Transform Map

First Name (from u_employee_import) → First Name (in the User table)

Last Name (from u_employee_import) → Last Name (in the User table)

Email (from u_employee_import) → Email (in the User table)

Department (from u_employee_import) → Department (in the User table)

Step 4: Transform Data and Import

- You run the Transform Map on the Import Set data.

5.) ServiceNow Transform Maps & Field Maps

Importing, transforming, and mapping imported data into ServiceNow

In the previous hands on I learned about importing,transforming ,mapping means but now how field maps are related to it :

Field Maps are a key component in ServiceNow's import process. They define the relationship between fields in an Import Set Table (a temporary table where imported data is initially stored) and fields in a Target Table (the actual table in ServiceNow where the data is intended to be stored). By specifying which field in the import set maps to which field in the target table, Field Maps ensure that data is accurately transformed and placed in the correct locations.

To import customer data from a CSV file into ServiceNow :

- **Create a Data Source** for the CSV file and load it into an Import Set Table.
- **Define a Transform Map** linking the Import Set Table with the "Customer" table.
- **Map Fields** from the Import Set Table to the "Customer" table fields (e.g., customer_id to customer_id).
- **Add Transformation Scripts** if needed, such as validating email formats.
- **Run the Transform Map** to move and map the data into the "Customer" table, ensuring accuracy and integrity.

6.) ServiceNow Incident Management Tutorial and Task Administration

- ServiceNow ticket and task management (Incident,Problem, Change)
- capabilities, task creation,
- task assignment rules,
- task collaboration, and
- visual task boards.

ServiceNow Ticket and Task Management

ServiceNow Ticket and Task Management involves handling and tracking different types of requests and issues within an organization. It includes three primary categories:

Incident Management deals with resolving individual user-reported issues to restore normal service quickly.

Problem Management focuses on identifying and addressing root causes of recurring incidents to prevent future issues.

Change Management oversees IT system modifications, ensuring changes are implemented smoothly with minimal disruption through structured planning and approval processes.

A task is a group of activities to be done .

Creating a Task: Navigate to the relevant module, click "Create New," fill in the details, and save.

Assigning a Task: Open the task record, select a user or group in the "Assigned to" field, and save the changes.

Collaborating on a Task: Use the comments and work notes sections to communicate updates and track activity related to the task.

To create an incident:

1. Log in to ServiceNow: Access your ServiceNow instance.
2. Navigate to Incident Creation: Go to Incident > Create New or Self-Service > Create New Incident.
3. Complete the Incident Form

Assignment Rule: An assignment rule in ServiceNow automates the process of assigning tasks to users or groups based on predefined criteria. It ensures that tasks are directed to the appropriate individuals or teams efficiently.

Tools for Assignment Rules:

- **Condition Builder:** Defines the criteria for when the rule should apply.
- **Assignment Actions:** Specifies how tasks are assigned, such as to specific users or groups.

Task Collaboration Tools:

- **Comments and Work Notes:** Allow users to communicate updates and notes within a task record.
- **Activity Stream:** Tracks and displays all activity and changes related to the task for visibility and collaboration.

7.) ServiceNow Reporting Tutorial

A report in ServiceNow is a tool used to extract, analyze, and present data from the ServiceNow platform.

1. Create a Report:

- Go to Reports > Create New, select the data source, and choose the report type (e.g., List, Chart). Configure the report by setting filters, arranging columns, and customizing visuals. Save the report with a descriptive name.

2. Manage Reports:

- Access reports via Reports > View / Run, then open a report to edit its filters, layout, or visualizations. Use Delete or Duplicate to remove or copy reports as needed.

3. Share Reports:

- Click the Share button to email the report or generate a shareable link. Schedule reports for automatic email delivery or add them to dashboards for continuous visibility

8.)What is Low Code No Code Development?

Low-code development is an approach to app creation that empowers developers to create powerful software applications, with a minimum of hand coding.

Benefits are : speed , agility ,cost , productivity.