DIGITAL NURTURE 3.0 SERVICENOW LEARNINGS

WEEK 1 : ServiceNow Platform and Development Fundamentals

(DAY 3&4):

TOPICS COVERED:

1.SERVICENOW PLATFORM OVERVIEW –

- ServiceNow Platform Architecture,
- Applications and Workflows,
- User Interfaces,
- Role-based Access and
- Authentication

ServiceNow Platform Architecture:-

1. The Now Platform is an Application Platform as a Service (APaaS).
2. ServiceNow is a cloud-based.
3. ServiceNow provides and supports the infrastructure computer resources.
4. ServiceNow provides a platform upon which you can develop your own custom solutions.
5. ServiceNow provides a robust set of applications and workflows to support most common business processes.

Applications and Workflows:-

1. ServiceNow comes with a robust suite of applications which are categorized (functionally) into 4 primary workflows:
2. IT Workflows: 79 applications that support internal IT functions
3. Employee Workflows: 43 applications targeted at the needs of employees
4. Customer Workflows: 93 applications that support functions related to customers
5. Creator Workflows: 23 applications designed to enable ServiceNow platform development and operations support

User Interfaces:-

1.Mobile UI

2.Service Portal

3.Now Platform UI.

Role-based Access:-

User:
A user in ServiceNow is an individual who interacts with the platform, either by creating, viewing, or managing records. Users have unique credentials and are assigned roles that define their access and capabilities within the system.

Group:
A group is a collection of users in ServiceNow that share a common purpose or responsibility, such as handling incidents or managing requests. Groups help streamline task assignments, approvals, and access control based on shared roles and permissions.

Role:
A role is a set of permissions in ServiceNow that defines what actions a user or group can perform and what data they can access. Roles are assigned to users or groups to grant specific access rights, enabling effective management of system security and functionality.

Authentication:-

User authentication in ServiceNow verifies a user's identity before granting access to the platform, ensuring secure and authorized use. This process typically involves username and password validation, and may include multi-factor authentication for enhanced security.

- Local database authentication
- Single sign on
- LDAP
- Multi factor authentication

2. ServiceNow User Interface Overview

- ServiceNow Platform User Interface,
- Fundamentals Lesson, identifying elements of the interface,
- Global Search, Connect Chat,
- Contextual Help, Application Navigator,
- Favorites, History.
- ACLs, UI policies, Business
- Rules and Client Scripting

ELEMENTS OF THE USER INTERFACE:-

Following are the Main Screen Elements-
Banner Frame:
The banner frame is located at the top of the ServiceNow interface and contains key elements like the logo, user profile, settings, global search, and notifications. It provides quick access to user options and platform-wide features, making navigation more efficient.

Content Frame:
The content frame is the main area where records, forms, lists, and dashboards are displayed. It's the central workspace where users interact with and manipulate data, making it the focal point for viewing and managing content within the ServiceNow platform.

Application Navigator:
The application navigator is a panel on the left side of the ServiceNow interface that lists available applications and modules. It allows users to quickly find and access different parts of the platform, such as incident management, service catalog, and reports, through a structured menu system.

Banner includes:
- Logo
- User Menu – Profile, Impersonate user, elevate roles, logout.
- Tools – Global Search , Connect Chat , Help.
- System Settings – (according to the UI preference).

APPLICATION NAVIGATOR:

It includes:

Navigation Filter:
The Navigation Filter is a search box at the top of the Application Navigator. It allows users to type keywords or phrases to filter and find specific applications or modules quickly, improving navigation efficiency.

All Applications:
The "All Applications" section in the Application Navigator displays a comprehensive list of all available applications and modules a user has access to. This section helps users browse and locate tools across the entire ServiceNow platform.

History:
The History section in the Application Navigator shows a list of recently accessed records, forms, and modules. It allows users to quickly return to previously viewed items, improving workflow efficiency by providing easy access to past activities.

Favorites:
The Favorites section in the Application Navigator allows users to bookmark frequently used applications, modules, or records. Users can quickly access their preferred items without navigating through the entire application structure.

Search for applications or modules

Application
Module

Application

Module
Category
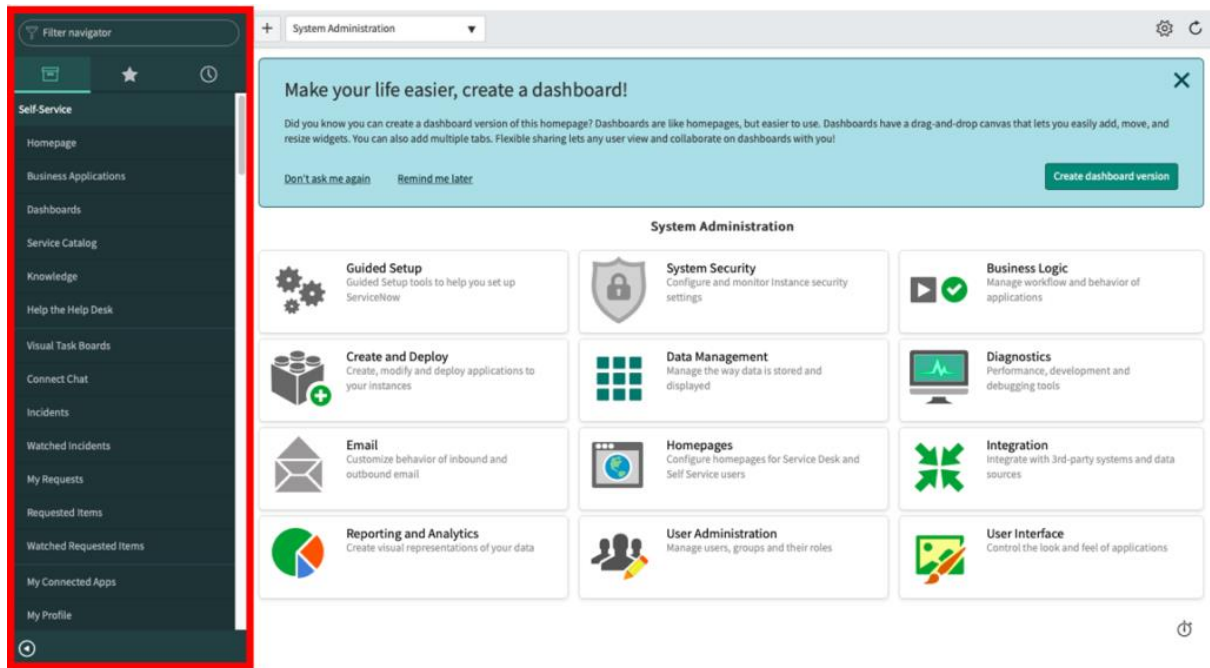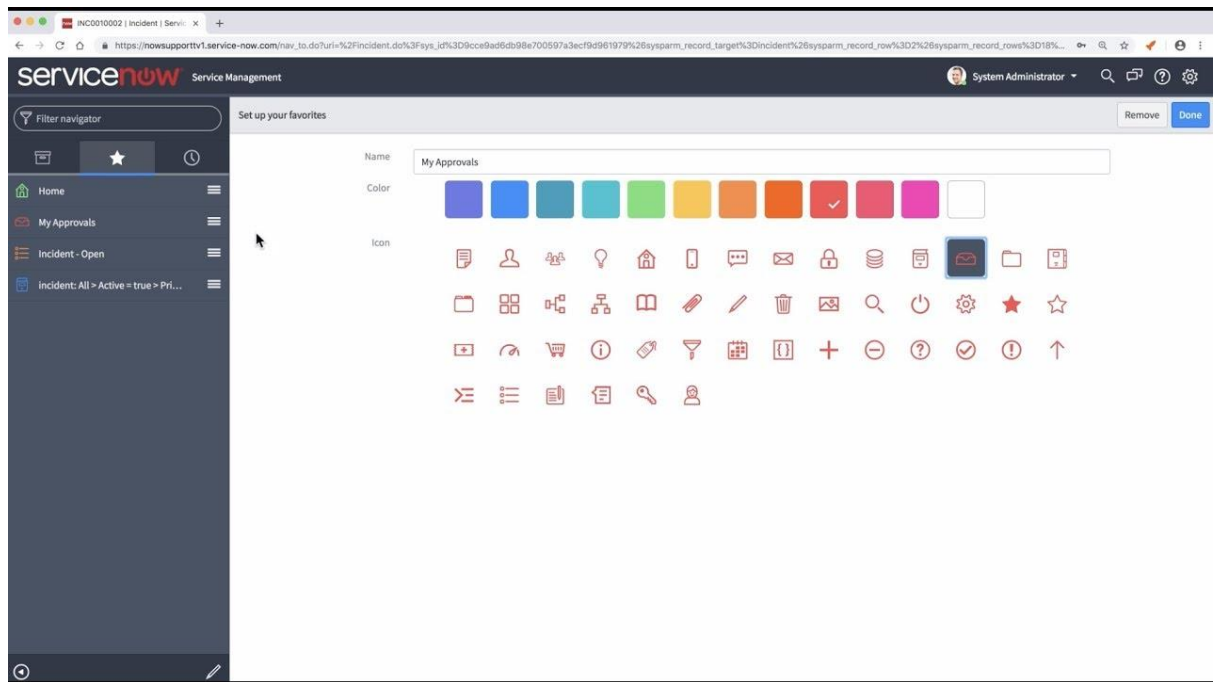
3.ServiceNow Branding Overview

- ServiceNow Branding
- Company Guided Setup,
- ServiceNow Portal, and UI Builder.

ServiceNow Branding:-

It means of applying your distinct corporate identity across the Now Platform Ul to create a shared identity, build trust, and speed adoption

Company Guided Setup:-

Company Guided Setup refers to a structured, step-by-step process designed to help organizations configure and customize their ServiceNow instance according to their specific needs. It provides a guided approach with pre-defined tasks, checklists, and best practices to streamline the setup of core applications, such as Incident Management, Change Management, and other IT service management processes. This helps ensure that the platform is configured efficiently and consistently with organizational standards.

- To access Guided Setup, locate the Guided Setup application in the Application Navigator and select the ITSM Guided Setup or ITOM Guided Setup module.
- ITSM Guided Setup includes the following categories: Company, Connectivity, Foundation Data, CMDB, Incident Management, Major Incident Management, Problem Management, Change Management, Service Catalog, Knowledge Management, Continual Improvement Management, Project Communication, Go Live.
- ITOM Guided Setup includes the following categories: MID Server, Discovery, Event Management, Operational Intelligence, Cloud Provisioning and Governance
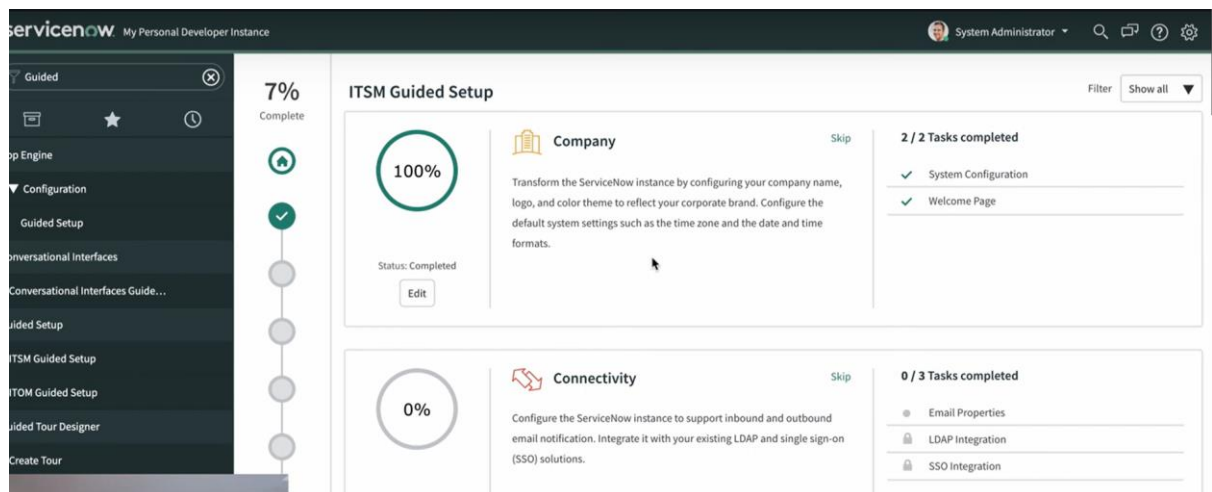
Service Portal, UI Builder:-
- Service Portal and UI Builder are two additional tools that can be used to brand the interface.
- Service Portal is a widget-based tool that allows creation of intuitive, user-friendly interfaces to the Now Platform.
- UI Builder allows you to build-out a functional page by choosing from a library of components (buttons and data visualizations) and layouts.

5.ServiceNow Lists and Filters

- ServiceNow List View interface, standard paradigm,
- List Control, filter conditions,
- Refresh list

LIST INTERFACE :-

Condition Builder:

The Condition Builder is a tool in ServiceNow used to create and define conditions for filtering data or setting criteria. It allows users to specify rules and logic to display specific records in lists, reports, and queries.

Breadcrumbs:

Breadcrumbs in ServiceNow are navigational aids displayed at the top of lists and forms. They show the path taken to reach the current view, allowing users to backtrack to previous filters or locations within the application easily.

Column Context Menu:

The Column Context Menu is a drop-down menu that appears when right-clicking on a column header in a list. It provides options such as sorting, filtering, grouping, or adding/removing columns, allowing users to customize how data is displayed.

Column Name:

Column Name refers to the header label of a column in a list or table within ServiceNow. It identifies the type of data contained in that column, such as "Incident Number," "Created Date," or "Assigned To."

Personalize List:

Personalize List is a feature in ServiceNow that allows users to modify the appearance and layout of lists. Users can choose which columns to display, their order, and apply personal preferences to enhance their view of data.

Column Search:

Column Search enables users to search for specific values within a column in a list. This feature helps users quickly find relevant records based on the contents of a particular column.

Sort Indicator:

The Sort Indicator is an icon displayed in the column header of a list that shows the current sorting order (ascending or descending). It helps users understand how the data is being sorted and can be clicked to change the sort order.

Refresh List:

Refresh List is a feature that updates the data displayed in a list to reflect the most current information. Clicking the refresh button reloads the list, ensuring that users see the latest changes or newly added records.

Scenario: Managing Wiki Webpage Issues in ServiceNow

1. Condition Builder:

You want to filter the issue list to show only the tickets related to webpage issues on the wiki that are classified as "High Priority." Using the Condition Builder, you create a filter with the condition:

Category **is** "Wiki Webpage" **AND** Priority **is** "High".

2. Breadcrumbs:

After applying the filter using the Condition Builder, breadcrumbs appear at the top of the issue list like this:

All > Issues > Category = Wiki Webpage > Priority = High.

These breadcrumbs show the path and the conditions applied to view the current list of wiki webpage issues.

3. Column Context Menu:

You right-click on the "Reported Date" column header and use the Column Context Menu to sort the issues by the date they were reported. You also hide the "Status" column temporarily to make more room for other columns that are more relevant to your current task.

4. Column Name:
In the list of issues, column names like "Issue Number," "Short Description," "Priority," "Assigned To," and "Reported Date" identify the type of information displayed in each column, helping you understand the content at a glance.

5. Personalize List:
You use the Personalize List option to add the "Affected User" column to the list view, so you can see which users are affected by each wiki webpage issue. You also rearrange the columns, moving "Priority" to the left for quicker sorting and viewing.

6. Column Search:
To find a specific issue by its short description, you use the search box in the "Short Description" column header to type in keywords like "broken link." This narrows down the list to only those records that mention "broken link" in their descriptions.

7. Sort Indicator:
After clicking on the "Reported Date" column header, a sort indicator (an up or down arrow) appears next to the column name. This shows that the list is sorted by the reported date in descending order, with the most recent issues appearing at the top.

8. Refresh List:
You click the Refresh List button to update the issue list and see the latest changes, ensuring any new wiki webpage issues or updates to existing ones are immediately reflected in your view.
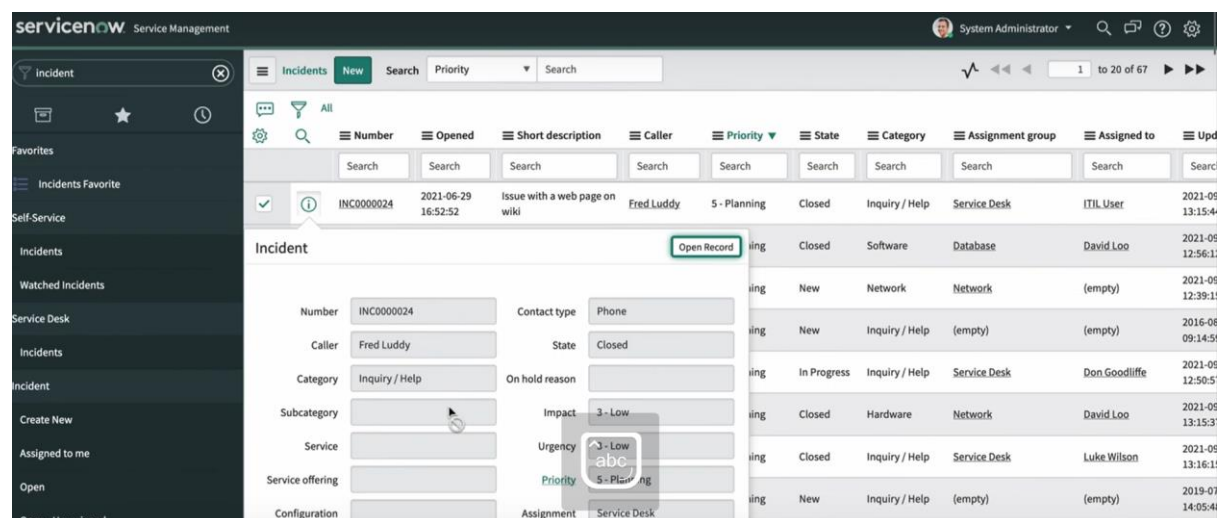
6.Forms in ServiceNow

- Forms in ServiceNow,
- The Standard Layout,
- Form Field Types, Saving Changes,
- Insert / Insert & Stay, Form
- Sections, Related Lists &
- Formatters, Form Views,
- Form Personalization,
- Adding Attachments,
- Form Templates,
- Creating & Editing Views.

What are Forms?

A form is a common set of tools and user-interface elements used to view and update a single record from the database.

It includes:

- Header Bar
- Required
- Related Lists
- Fields

➕ Read Only

Form Field Types:
➕ String Field
➕ Choice Field
➕ Boolean(T/F) Field
➕ Reference Field

Form Activities Include:
➕ Saving changes
➕ Copying records
➕ Insert / Insert & Stay, Form
➕ Sections, Related Lists &
➕ Formatters

Managing an Incident Report for Wi-Fi Password Access Issue
1. Saving Changes:
The user submits a report indicating that they are unable to access the Wi-Fi password. After filling out the form with details such as **Short Description** ("Unable to access Wi-Fi password"), **Description** ("Cannot find the Wi-Fi password for the conference room"), and **Priority** ("High"), the user clicks **Save** to record the issue.

2. Copying Records:
A similar issue was reported previously for another conference room. The user uses the **Copy Record** feature to duplicate the previous incident's details. They adjust the specifics, like changing the location from "Room A" to "Room B," and then save it as a new incident for the current issue.

3. Insert / Insert & Stay:
Insert: After filling out the incident form with all necessary information about the Wi-Fi password issue, the user clicks **Insert**. This saves the new incident and returns the user to the incident list.
Insert & Stay: The user completes the form for the Wi-Fi issue and clicks **Insert & Stay**. This saves the incident but keeps the user on the same form to quickly create another similar incident if needed.

4. Sections:
The incident form is organized into sections such as **Issue Details**, **Affected Systems**, and **Additional Notes**. The **Issue Details** section includes fields like **Short Description** and **Description**, while **Affected Systems** might have fields related to the Wi-Fi network and location.

5. Related Lists:
On the incident form, related lists might show records such as **Work Notes** and **Change Requests**. The **Work Notes** list displays any updates or comments related to resolving the Wi-Fi password issue, while the **Change Requests** list might show any pending requests for changes to network settings.

6. Formatters:
The incident form might include a **Status Indicator** formatter that visually represents the status of the incident, such as a progress bar showing "In Progress" or "Resolved." This helps users quickly see the current status of the Wi-Fi access issue.

7. Form Views:
The user can switch between different form views, such as **Standard View** and **Technical Support View**. The **Standard View** might display basic fields like **Description** and **Priority**, while the **Technical Support View** includes additional fields like **Network Configuration** and **Resolution Steps**.

8. Form Personalization:
The user personalizes the incident form by moving the **Priority** field higher on the form for better visibility and hiding the **Resolution** field initially, as it's not relevant until the issue is resolved.

9. Adding Attachments:
The user attaches a screenshot of the error message received when trying to access the Wi-Fi password to the incident record using the **Add Attachment** feature. This provides additional context and helps the support team understand the problem better.

10. Form Templates:

A standard form template for **Wi-Fi Issues** is used, ensuring that fields like **Location**, **Network Name**, and **Problem Description** are consistently filled out. This template helps streamline the reporting process for similar issues.

11. Creating & Editing Views:

The user creates a new view called **Wi-Fi Support View** that shows fields relevant to Wi-Fi issues, such as **Access Point Location** and **Password Retrieval Status**. They also edit an existing view to adjust which fields are visible based on the needs of the support team handling Wi-Fi access issues.