# Week 2: Understanding Document

## 1. Platform Overview and Architecture

ServiceNow is a leading cloud-based platform designed to support enterprise-wide service management processes. Its architecture is multi-instance, meaning that each customer has its dedicated instance, ensuring data security and performance optimization. This single-tenant architecture provides customization flexibility while maintaining security and performance. ServiceNow's architecture includes three layers:

- Database Layer: Stores data using relational tables that can be extended and customized.
- Application Layer: Hosts the applications and workflows built on the platform, including ITSM, HR, CSM, and others.
- Presentation Layer: Manages how users interact with the platform through the UI, lists, and forms.

ServiceNow supports automation, integrations, and workflows to enable businesses to streamline IT services, security operations, human resources, and more.

## 2. User Interface and Branding

The user interface (UI) in ServiceNow is designed for ease of use while offering customization options to reflect company branding. The UI is divided into different sections, including:

- Application Navigator: Allows users to quickly access modules, tables, and applications.
- Forms and Lists: Enable interaction with data through easy-to-navigate interfaces.
- Branding: Organizations can customize the platform's look and feel by adjusting logos, color schemes, and headers.

UI changes can be made using themes or custom styles, ensuring that ServiceNow aligns with the organization's visual identity.

## 3. Lists, Filters, and Forms

Lists in ServiceNow display records from a table in a spreadsheet-like format, offering features such as sorting, filtering, and exporting data. Filters allow users to define specific criteria to view only the relevant records. These filters can be saved for future use, helping users to quickly access common views. Forms are another key element in ServiceNow, providing a structured interface to view, edit, and input data in records.

Key components of forms include:

- Form Header: Displays the record title and offers quick actions like save, delete, and submit.
- Form Fields: Capture specific pieces of data, such as text inputs, date pickers, reference fields, and choice lists.

Together, lists, filters, and forms enhance user interaction with the data stored in ServiceNow.

## 4. Task Management

ServiceNow's task management system is integral to automating workflows and tracking task assignments across various modules like Incident Management, Problem Management, and Change Management. A task is any record in ServiceNow that requires action. Tasks can be assigned to individuals or groups, and the platform provides notifications and automated updates to keep tasks moving through the workflow.

Tasks have a lifecycle, including states such as 'Open', 'In Progress', 'On Hold', and 'Closed'. Service Level Agreements (SLAs) can also be associated with tasks to ensure they are completed within specific time frames.

## 5. Notifications

ServiceNow offers a robust notification system that helps users stay informed about key events, such as task assignments, status changes, or escalations. Notifications can be sent via different channels, including email, SMS, or in-platform alerts.

Administrators can configure notification rules based on user roles, event types, or conditions. For example, users can be notified when a high-priority incident is assigned to them or when an SLA is about to breach. ServiceNow's notifications can be customized using templates that define the message content and format.

## 6. Knowledge Management

Knowledge Management in ServiceNow allows organizations to create, share, and manage knowledge articles, which are used to capture solutions, FAQs, and best practices. The module enables users to search and access relevant information, reducing the reliance on support teams and improving self-service capabilities.

Key Features include:

- Knowledge Base Creation: Administrators can create multiple knowledge bases, each focused on specific domains (e.g., IT, HR).
- Article Lifecycle: Knowledge articles go through different states such as draft, review, and published.
- Feedback and Ratings: Users can provide feedback or rate articles to improve the quality of the knowledge base over time.

## 7. Service Catalog

The Service Catalog provides a self-service portal where users can request services, products, or information from various departments. Each item in the catalog is linked to automated workflows that handle approvals, task assignments, and fulfillment.

Popular catalog items include:

- Request for new hardware (e.g., laptops, monitors)
- Software installation requests
- Access to applications or systems

- Onboarding services for new employees

The Service Catalog simplifies and automates the fulfillment of routine requests, reducing the workload on IT and other support teams.

## 8. Tables and Fields

Tables in ServiceNow store data in rows and columns, with each row representing a record and each column representing a field. Tables are central to data management, and fields define the type of data stored (e.g., text, date, integer). Administrators can create custom tables and fields to meet specific business requirements.

- Custom Tables: Can be created to store unique data for specific use cases.
- Field Types: Include text, choice lists, reference fields (which link records across tables), and more.

Tables and fields in ServiceNow allow for structured and flexible data management across various modules.

## 9. Access Control List (ACL)

The Access Control List (ACL) in ServiceNow determines who can view or modify data within the platform. ACLs are applied at the table, record, or field level and control access based on roles, conditions, and scripts.

- Table-Level ACLs: Control access to all records in a table.
- Record-Level ACLs: Apply permissions to specific records within a table.
- Field-Level ACLs: Control access to individual fields within a record.

By configuring ACLs, administrators ensure that sensitive data is only accessible to authorized users.

## 10. Data Import

Data Import in ServiceNow allows administrators to bring external data into the platform. The process involves mapping external data fields to ServiceNow fields and validating the data before importing. ServiceNow supports importing from CSV, Excel, or external databases via connectors or APIs.

- Import Set Table: Temporarily holds the data before it is transformed and loaded into target tables.
- Transform Maps: Define how fields in the import set map to fields in ServiceNow tables.

Data imports help organizations keep their systems up-to-date and synchronized with external data sources.

## 11. CMDB

The Configuration Management Database (CMDB) is essential for tracking and managing configuration items (CIs), such as servers, applications, and network components. The CMDB

helps maintain an accurate inventory of IT assets and their relationships, which is critical for incident, problem, and change management processes.

- • Configuration Items (CIs): Represent physical or logical assets.
- • Relationship Mapping: Shows dependencies between CIs, providing insights into the impact of outages or changes.

A well-maintained CMDB improves decision-making and supports root cause analysis during service disruptions.

## 12. Integration

ServiceNow offers various integration options to connect with external systems such as CRM, ERP, or monitoring tools. Integration can be achieved through APIs (REST, SOAP), web services, or custom connectors.

- • REST API: Enables ServiceNow to send and receive data from other systems.
- • SOAP API: An older but widely supported protocol for system integration.

Integrations help streamline data flow between systems, enabling more cohesive business processes.