

ServiceNow Basics

User Training

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Basic Navigation

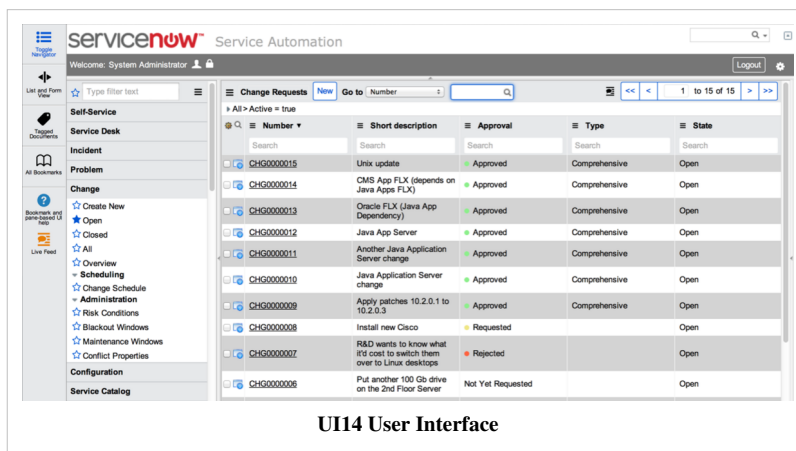
Navigation and the User Interface

Overview

The user interface is the main way to interact with the applications and information in a ServiceNow instance.



Note: Screen shots in the ServiceNow wiki may reflect any version of the ServiceNow user interface.



User Interface Tour

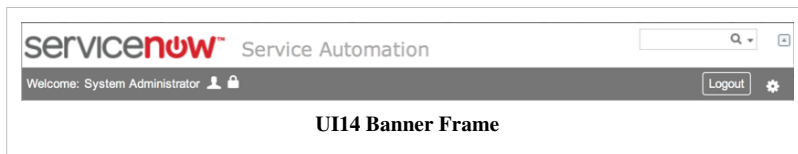
The user interface is divided into the following areas:

- **Banner frame:** runs across the top of every page and contains a logo, global navigation controls, and tools.
- **Application navigator or left-navigation bar:** provides links to all applications and modules.
- **Content frame:** displays

information such as lists, forms, homepages, and wizards.

The Edge: a toolbar on the left side of the interface that provides quick links to commonly used features.

UI14 Banner Frame



The UI14 banner frame contains the following controls and tools.

- **Welcome message:** shows the name of the current user and provides a link to the user's profile.
- **Impersonation key** (): (administrators only): allows the administrator to switch user views without logging out; useful for testing security and role-specific setup functions.
- **Elevated Privileges** (): (elevated privilege roles only): allows the user to elevate to a higher security role when needed and then return to their normal role.
- **Global Text Search** (): searches for text in multiple applications.
- **Collapse/Expand Banner** (/): alters the amount of space the banner frame occupies.
- **Logout:** returns to the Welcome page for subsequent login.
- **Gear icon** (): displays the system menu with additional settings and controls.
- **Home** (): provides links to available application homepages.
- **Printer friendly version** (): opens a printer friendly version of the current content frame.
- **Help** (): opens the ServiceNow Wiki in another window or tab.
- **JavaScript Log and Field Watcher** () (administrators only): opens the client-side JavaScript Debug window. This icon is commonly called the debug icon.
- **Font Size** (/): changes the font size on all pages and menus. When you make a change, the new font size appears briefly in the Welcome banner.
- **Split Layout:** splits the content frame into two panes, either vertical or horizontal. In a vertical split, the list pane is on the left and the form pane is on the right. In a horizontal split, the list pane is on the top and the form pane is on the bottom.
- **Enable Accessibility:** enables or disables the Section 508 accessibility features.
- **Application** (administrators only): provides a link to the Applications list, the Application picker, and the application icon (). If the application picker shows **None**, clicking the icon takes you to a blank application form; if it shows an application, clicking the icon takes you to the record for the selected application.
- **Update Set** (administrators only): provides a link to the Update Sets list, the Update Set picker, and the view current update set icon ().
- **Language:** select a language or return to the default language (). This option is available if a language plugin is activated.
- **Theme:** select a theme for the user interface or return to the system theme ().

Application Navigator

The application navigator, or left-navigation pane, appears at the left of the screen and provides links to all of the applications and modules. Each application appears as a section in the application navigator denoted by an application label. Modules are listed by name under each application label. Use the application navigator to quickly find information and services.

To view information in the application navigator:

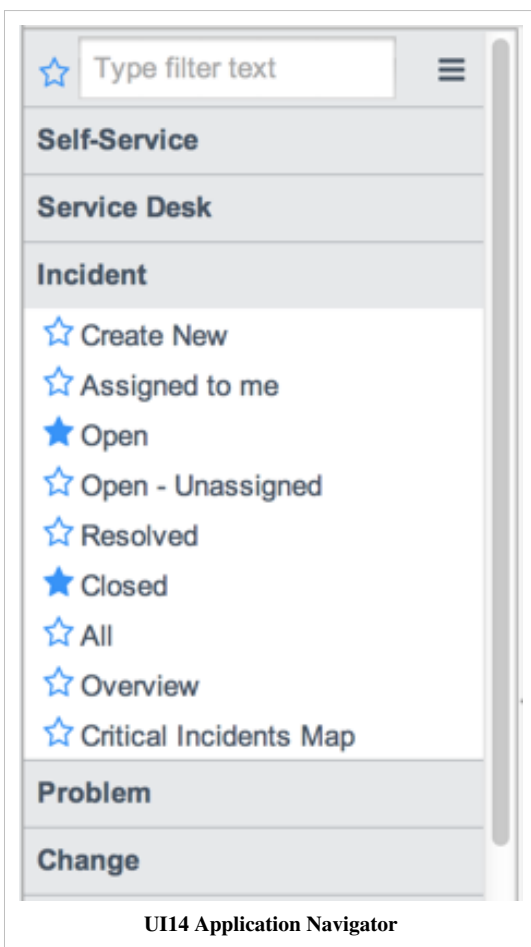
- Expand an application menu by clicking on the label to show the available modules. Click again to collapse the application and hide the modules.
- Filter the applications and modules listed in the application navigator by entering text in the navigation filter at the top.

To view information in the content pane:

- Click a module.
- Enter **<table name>.list** into the navigation filter at the top to display the associated list.

For more information about using the application navigator, see Navigating Applications.

UI14 Application Navigator



In addition to displaying and filtering the applications and modules in the application navigator, users can:

- Use the module icons (☆) and the filter icon (☆) to select and view favorites.
- Make selections from the application navigator control menu by clicking the menu icon (≡) in the application navigator header.

Content Frame

The content frame is the main area of the user interface and displays different types of pages.

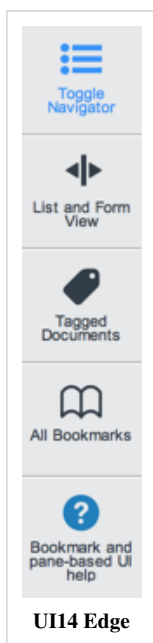
- **Welcome page:** appears when a user is not logged in. Administrators can customize the welcome page.
- **Homepages:** provide easy access to commonly used functions or information. Users and administrators can customize homepages.
- **Service catalog:** provides a portal for customers to order goods and services. It is similar to a homepage, where each gauge is a category of catalog items. For more information, see [Using the Service Catalog](#).
- **Knowledge base:** allows for storage and publication of any information, such as desktop support information, company and department processes or procedures, or documentation on internally developed applications. It is similar to a service catalog, where each gauge is a topic in the knowledge base. For more information, see [Knowledge Management with KCS](#).
- **Lists:** display information in a table. Users can search, sort, filter, and edit lists. For more information, see [Using Lists](#).
- **Forms:** create or modify an individual record. For more information, see [Using Forms](#).
- **Wizards:** are helper applications that provide a step-by-step user interface for a process. Wizards are created by an administrator.
- **Surveys:** enable users to take surveys and administrators to create surveys.
- **External URLs:** display content from outside the ServiceNow platform.
- **Custom URLs:** display ServiceNow content. Administrators can define a module using a custom URL.
- **Content pages:** display content built with the content management system.


The Edge

The Edge is a gray toolbar on the left side of the screen. This toolbar provides quick access to features such as bookmarks and flyout windows.

UI14 Edge

In UI14, the Edge provides the following functions:




- **Toggle Navigator:** shows or hides the application navigator.
- **List and Form View:** splits the content frame into two vertical panes, with the list pane on the left and the form pane on the right. To split the content pane horizontally, click the gear icon () and then click **Split Layout Horizontal**.
- **Tagged documents:** displays the Tagged Documents page.
- **All bookmarks:** provides a list of all bookmarks in the Edge. For more information about creating and managing bookmarks, see [Using Bookmarks](#).
- **Bookmark and pane-based UI help:** displays the Edge help window.

Navigating Applications

Overview

An application is a group of modules, or pages, that provide related information and functionality in a ServiceNow instance. For example, the Incident application contains modules for creating and viewing incidents; the Configuration Management application contains modules for configuring servers, databases, and networks.

The application navigator, or left-navigation bar, provides links to all applications and the modules they contain, enabling users to quickly find information and services. To hide the application navigator:

- **UI14:** click the Toggle Navigator button () in the Edge.

Administrators can customize the application navigator to provide different modules by user role, modify or define applications and modules, and change its appearance.

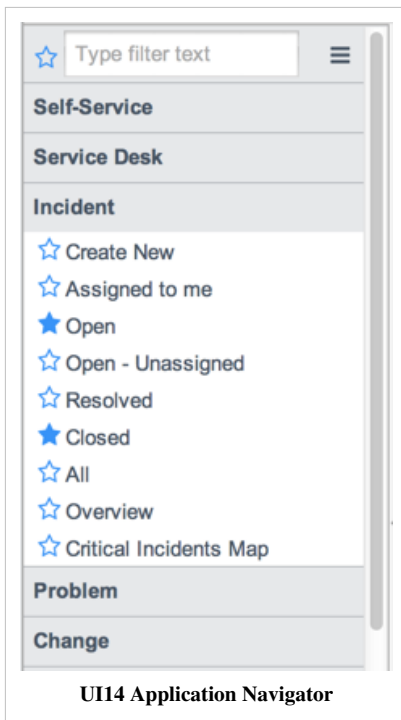
Using the Application Navigator

The application navigator comprises a list of application labels and the application navigator header. Each application appears as a section in the application navigator denoted by an application label. Modules are listed by name under each application label.

To expand or collapse an application section, click the application label. To open a module in the content frame, click the module name.

If you cannot find an item in the application navigator, consider the following reasons:

- You may not have access rights. The applications and modules available to a user may depend on the user's role. For example, the Finance department may not have access to change management modules.
- The application may be deactivated in your company's ServiceNow implementation. Contact the system administrator to activate it, if necessary.
- The application that contains the module you are looking for may be collapsed.



UI14 Application Navigator

Module Icons





In addition to names, modules in the application navigator also have icons.

UI14: each module has a star icon to the left of the module name. Use these stars to identify and view frequently used modules. For more information, see [Using Favorites](#).

Application Navigator Header

The application navigator header provides the following tools, depending on the version of the interface currently in use.

UI14

- **Navigation Filter** ( ): filters the applications and modules that appear in the navigator based on the filter text. To learn more, see [Using the Navigation Filter](#).
- **Favorites Filter** (): filters the modules displayed in the application navigator, showing either all modules or the modules marked as favorites.
- **Menu** (): lists the following menu options.
 - **Roles:** similar to the **Switch Perspectives** option in UI11. Selecting a role filters the available applications by that role (for example, select ITIL to show only ITIL items such as Incidents, and filter out Asset Management items such as Asset Portfolio). You must have access rights to the items to see a perspective in the list. Administrators can customize perspectives. To see all available applications, click **All**.
 - **Automatically Add Favorites:** when enabled, any module that the user selects is automatically marked as a favorite.
 - **Refresh Navigator:** refreshes the list of applications and modules. Administrators who are customizing the navigator can test their work without refreshing the whole browser session.
 - **Collapse All Applications:** collapses all applications so that only application labels appear.

- **Expand All Applications:** expands all applications so that all available modules appear.



Note: To increase or decrease font size on pages and menus, click the gear icon on the banner.

Using Favorites

In UI14, the application navigator has a star icon beside each module name that can be selected (★) or deselected (☆). Use these icons to select frequently used modules and then display only the favorites in the application navigator.

- Click the star icons to select and deselect modules as favorites.
- Click the favorites filter icon (☆) beside the navigation filter to turn on and off favorite modules. Selecting this icon shows the favorite modules; deselecting shows all modules.

By default, a module is automatically selected as a favorite when you open the module. To disable this setting, click the menu icon (≡) in the application navigator header and select **Automatically Add Favorites** from the list to remove the check mark.

Using the Navigation Filter

The navigation filter helps users quickly access information and services by filtering the items in the application navigator or opening forms and lists directly.

- If a module name contains the text, the application label expands to show that module.
- If an application name contains the text, the application label expands to show all modules in that application.

To use the navigation filter:

1. Click **Type Filter Text** in the application navigator header, or press **Access Key** ^[1] + **F**. A text entry field appears.
2. Begin typing the filter text (for example, *inc* for Incidents). The list of items available in the application navigator is filtered as you type.
 - To open a module, click the module name, or press the **Down Arrow** to highlight and then **Enter**.
 - If you know the table name and wish to open a list or form directly, enter the table name followed by *.list* or *.form* (*.LIST* or *.FORM* for a new tab or window). For example:
 - *incident.LIST* opens the incident list in a new tab or window.
 - *incident.form* opens a new incident form in the content frame.

Introduction to Searching

Overview

Find information quickly in ServiceNow by using any of the available searches. Searches are not case sensitive. Use advanced options for more specific queries:

- Wildcards: use a symbol to represent zero or more characters.
- Phrase searches: find a phrase with multiple terms.
- Searching lists: control the query for list searches of a specific field.
- Boolean operators: refine searches with operators such as AND and OR.
- Attachment searches: search in files that are attached to records.
- International character sets: perform searches with any Unicode characters.
- Punctuation: perform searches that contain punctuation.

Zing is the text indexing and search engine that performs all text searches in ServiceNow.

Available Searches

Use any of the following searches to find information in ServiceNow:

- Lists: find records in a list; search in a specific field (Go to), all fields (Search), or in a specific column.
 - Global text search: find records in multiple tables from a single search field.
 - Knowledge base: find knowledge articles.
 - Navigation filter: filter the items in the application navigator.
 - Live feed: filter, search, or sort messages in live feed.
 - Search screens: use a form-like interface to search for records in a table. Administrators can create these custom modules.
-

Wildcards

Wildcards are available for Zing.

The following searches support single and multiple character wildcard searches:

- Global text search
- Knowledge base
- Lists (text searches of all fields)

To perform a single character wildcard search, use the percent sign (%) symbol. This wildcard finds terms that contain any one character to replace the percent sign. For example, to find text or test, search for:

```
te%t
```

To perform a multiple character wildcard search, use the asterisk (*) symbol. This wildcard finds terms that contain 0 or more characters to replace the asterisk. For example, to find planned or placed, search for:

```
pl*d
```

You can use wildcard characters anywhere in a search term. If a wildcard returns too many options for an efficient search, a message appears asking you to refine the search. Administrators can configure the limit for wildcard searches with the `glide.ts.max_wildcard_expansion` property.

Phrase Searches

Use quotation marks to search for a phrase with multiple terms. Zing finds only matches that contain the exact words in the exact order you specify, ignoring stop words (common words that are excluded from searches) and punctuation. For example, the following searches return the same results because the stop word *a* is ignored:

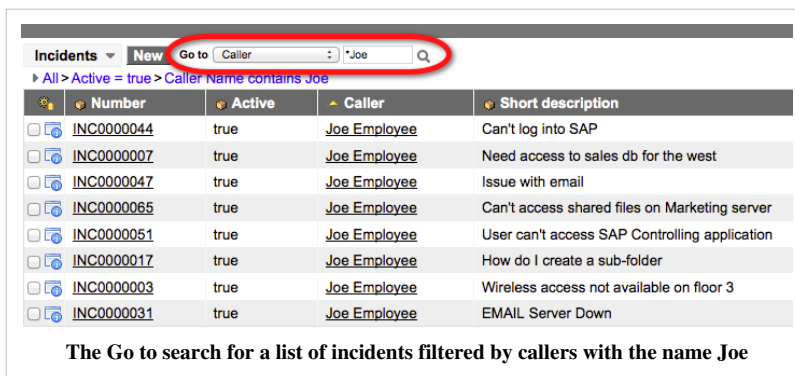
```
"email password"
```

```
"email a password"
```

Wildcards do not work within quoted phrases; they are ignored as punctuation.

Searching Lists

By default, a list view includes a **Go to** search option that includes a choice list and a search field. The choice list contains a general text search option in addition to an option for each column name in the list. The column names are actually the field names on the record form. Use the choice list in conjunction with the search field to filter the list of records by the desired field.



The Go to search for a list of incidents filtered by callers with the name Joe

	Number	Active	Caller	Short description
<input type="checkbox"/>	INC0000044	true	Joe Employee	Can't log into SAP
<input type="checkbox"/>	INC0000007	true	Joe Employee	Need access to sales db for the west
<input type="checkbox"/>	INC0000047	true	Joe Employee	Issue with email
<input type="checkbox"/>	INC0000065	true	Joe Employee	Can't access shared files on Marketing server
<input type="checkbox"/>	INC0000051	true	Joe Employee	User can't access SAP Controlling application
<input type="checkbox"/>	INC0000017	true	Joe Employee	How do I create a sub-folder
<input type="checkbox"/>	INC0000003	true	Joe Employee	Wireless access not available on floor 3
<input type="checkbox"/>	INC0000031	true	Joe Employee	EMAIL Server Down

To use the Go to search:

1. Navigate to a list of records.
2. If necessary, modify the fields for the list of records by clicking the gear icon (⚙) and selecting the desired fields.
3. From the **Go to** choice list, select the desired field on which to filter.
4. In the search box, enter the text to search for.
5. Click the search icon (🔍).

Searching Values in Choice Lists

Each option in a choice list is defined with a column label and a value. For example, the **State** choice list field on the Incident form contains several options. The text you see for each option, such as **New** and **Closed**, among others, is the column label. Each of these column labels has an underlying value. On the Incident form, the default value for **New** is **1** and the default value for **Closed** is **7**.

To search for records based on the values in a choice list, use the **Go to** search and do either of the following:

- Select **for text** as the Go to search option and enter the text of the column label. For example, entering **Resolved** when you search for text on a list of incidents returns all incident records that have **Resolved** somewhere in the record, including the **State** field.
- Select **State** as the Go to search option and enter the value for that state. For example, entering **6** when you search the **State** field on a list of incidents returns all incident records that have a state greater than or equal to (\geq) 6. Assuming the default values for the Incident form, all records in the **Resolved** and **Closed** state appear because the value for the **Resolved** is 6 and the value for **Closed** is 7.

Selecting **State** in the Go to search and entering **Resolved** would not return any records because the search is looking for the value, not the column label.



Administrators can see the underlying values of all choice list options by right-clicking a choice list field and selecting **Show Choice List**.

Choice list values are also useful for scripting. See Client Scripts for more information.

Using Column Search

UI14 Column Search

In addition to searching by field or for text, you can also search individual columns in a list.

1. Click the search icon () beside the personalize list icon () to expand the column headers and add a search field to each column.

2. To search a single column, enter the search text in the desired column search field and press **Enter**.

The search returns records that match the search term.

3. To search multiple columns, do one of the following:

- Enter the search text in each of the desired column search fields and press **Enter**.
- Search an individual column and then search additional columns based on the results of the first search.

Each time you enter search criteria in a column search field and press **Enter**, the results will narrow.

To clear a column search:

- Delete the text in the search field for the desired column and press **Enter**. This returns results for any remaining column search criteria.
- Delete the text in all of the column search fields to return all records in the list.

Using Wildcards with List Searches

If you enter text in the search box without using any wildcards, the system performs the search for values greater than or equal to the value you enter. For text fields, this means that the search first sorts the records on the selected field, then finds the first record that starts with the text and all following records. For numeric fields, this means that the search finds all records where the number field ends with the entered number.

You can use wildcards to refine your search. The following wildcards are available:

- ***searchterm:** or **%searchterm%:** search for values that contain *searchterm*
- **%searchterm:** search for values that end with *searchterm*
- **searchterm%:** search for values that start with *searchterm*
- **=searchterm:** search for values that equal *searchterm*
- **!*searchterm:** search for values that do not contain *searchterm*
- **!%searchterm:** search for values that do not end with *searchterm*
- **!=searchterm:** search for values that do not equal *searchterm*

Administrators can add a property to perform a default *contains* search instead of a *greater than* search. To make this change, add the property **glide.ui.goto_use_contains** (it is not available by default) and set the property value to **true**.

Boolean Operators

Boolean operators combine search terms with logic operators. The following searches support boolean operators:

- Global text search
- Knowledge base
- Lists (text searches of all fields)

For these searches, the AND operator is applied by default, which means if no Boolean operator is entered between two terms, the AND operator is used. For knowledge base searches, if the AND search returns poor results, the search is automatically re-run with the OR operator. Administrators can configure the knowledge base search to always use OR by modifying the **glide.knowman.search.operator** property.



Note: Boolean operators are case-sensitive. For example, OR is an operator while or is a search term that may be a stop word.

OR or vertical bar symbol ()	Finds a match if either of the terms exist in a document (a union using sets). For example, to find documents that contain either "email password" or just "email", search for: "email password" OR email or "email password" email
AND	Finds a match if both terms exist in a document (an intersection of sets). For example, to find documents that contain "CPU load" and "10 minutes", search for: "CPU load" AND "10 minutes"

NOT , minus (-), or exclamation point (!)	<p>Excludes documents that contain the term after NOT (a difference of sets). For example, to find documents that contain "CPU load" but not "10 minutes", search for:</p> <pre>"CPU load" NOT "10 minutes"</pre> <p>or</p> <pre>"CPU load" -"over 10"</pre> <p>The NOT operator cannot be used with just one term. For example, the following search returns no results:</p> <pre>NOT "10 minutes"</pre> <p>NOT must be a stand-alone word. For example:</p> <pre>atom NOT ion</pre> <p>excludes the term <i>ion</i></p> <pre>NOTION</pre> <p>searches for the term <i>notion</i></p> <p>Minus and exclamation point must immediately precede the excluded term. For example:</p> <pre>email !Joe</pre> <p>Excludes <i>Joe</i></p> <pre>email ! Joe</pre> <p>Includes <i>Joe</i>.</p>
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Searching for Attachments

Searches return matches in attachments when the attachment indexing option is enabled for the table you are searching. By default, this option is enabled for the knowledge base. Administrators can enable or disable this option for any table.

Searching with International Character Sets

Zing indexes the full range of Unicode characters to provide i18n support for searches.

How Zing Analyzes Characters

For Zing indexing and queries, documents are treated as a sequence of words. Words may be a single character (typical for Chinese and Japanese pictograms), or they may be space-separated sequences of letters (typical of Latin, Arabic, and Pinyin languages).

When dividing a document into words, Zing uses the following rules to interpret Unicode characters.

- **Punctuation:** Some punctuation and symbols are indexed in special cases (see How Punctuation Affects Search Results). In all other cases, punctuation characters are converted to spaces. Spaces define the basic unit of word separation.
- **Pictograms:** Each Chinese or Japanese pictogram is indexed as a separate word (as if it were a single Latin-1 character surrounded by spaces).
- **Letter:** All other characters (such as Latin-1, Arabic, or Pinyin) are individual letters of space separated words. Sequences of letters define indexable words.

Wildcard text searches and i18n References

Wildcard text searches (with "*" and "%") are only effective with multiple character words. A wildcard within a sequence of pictogram characters returns too many options for an efficient search. Wildcards are best used with letter-based words.

[1] <http://en.wikipedia.org/wiki/Stemming>

Stemming and i18n

During queries, search terms that are not part of phrases (not enclosed in quotation marks) are generalized to their "stemmed" word. Stemming removes a variety of common inflections, such as "-s", "-es", "-ing", or "-ed". All words with a common stem are treated as synonyms of the original search term. Zing uses the Porter stemmer^[1], which is most effective for English text.

Searching HTML Content

The ServiceNow system indexes the following elements in HTML tags starting with the Eureka release. Other HTML codes are not indexed.

- **Title attributes:** In any HTML tag, the title attribute, which is a different element than the *title* HTML tag.
- **Anchor link targets:** In any anchor link that specifies an href, the linked-to URL.
- **Alt text for images:** In any image element, the alternative text for screen readers.

How Punctuation Affects Search Results

Zing uses select punctuation symbols to improve search results. For example:

- **Apostrophes ('):** ignores trailing possessives and retains most others. For example, a search for *O'Reilly's* locates matches to *O'Reilly* and *O'Reilly's*.
- **IP addresses:** locates numbers that follow a typical IP address pattern.
- **Numbers:** locates terms that follow a typical product or record number pattern. To meet this pattern, search terms must contain frequent numbers and only these punctuation characters: underscores (_), hyphens (-), or periods (.). For example, a search for *INT123-456* locates exact matches to the search term.
- **Acronyms:** locates acronyms whether they are separated by periods (.) or not. For example, a search for *u.s.a.* locates matches to *usa* or *u.s.a.*. Note that wildcard searches may affect acronym handling. For example, a search for *u.s.** may yield better results than a search for *u.s.*
- **Company names:** locates terms containing punctuation characters that are common in company names: ampersands (&), plus signs (+), or hyphens (-). For example, a search for *RM&S* locates exact matches to the search term.
- **Host names:** locates sequences of letters and numbers separated only by periods (.). For example, a search for *en.myhost123.com* locates exact matches to the search term.

Note:



- Punctuation handling must be enabled by an administrator.
- The punctuation handling described here does not affect wildcards and boolean operators. These operators provide separate Zing functions.

References

[1] <http://en.wikipedia.org/wiki/Stemming>

Managing Records in Lists

Using Lists

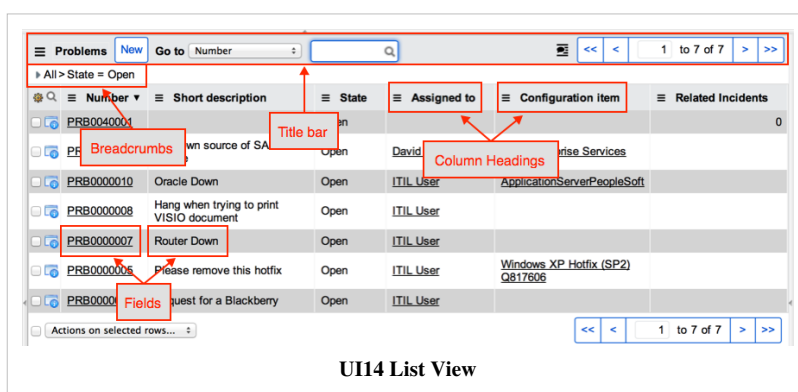
Overview

Lists display information from a data table. Users can search, sort, filter, and edit data in lists. Lists also may be embedded in forms and may be hierarchical (have sublists).

The list interface contains four main elements:

- Title Bar
- Breadcrumbs
- Column headings
- Fields

A response time indicator (⌚) may appear at the bottom right of some lists to indicate the processing time required to display the list.



Title Bar

The title bar displays the title of the list (table) and provides several controls.




The title bar includes the following controls:

- **List controls:** appears when you click the menu icon (≡) to the left of the list title . This menu provides the following list controls:

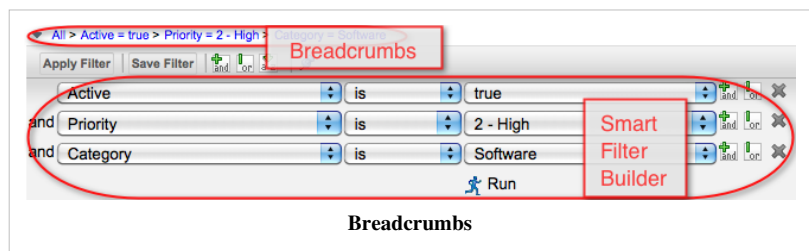
- **View:** changes the columns and order of the list to a predefined layout. Administrators can customize views.
- **Filters:** applies a saved filter or allows you to edit a personal filter.
- **Group By:** aggregates records by a field.
- **Show:** changes the maximum number of records per page.
- **Refresh List:** refreshes the list to show changes immediately.
- **New:** opens a blank form that allows users to create a new record in the list.

Clicking the **New** button in a filtered list automatically applies the same filter to the new record. For example, clicking **New** in the Closed Incidents list opens a new record preset with **Active** deselected. In a list filtered for active, priority 1 incidents, clicking **New** opens a new record preset with **Active** selected and **Priority** set to **1 - Critical**. You can change the preset values on the form as needed. If there is a field you do not want to have populated in this way, you can add the following dictionary attribute to the field: `ignore_filter_on_new=true`.

- **Go to or Search:** finds information in the current list. For more information, see Finding Information in Lists.
- **List Activity Stream** (): (UI14) shows recent record activity for all records currently displayed on a list. For more information, see Displaying Activity Streams.

Breadcrumbs

Breadcrumbs offer a quick form of filter navigation. A filter is a set of conditions applied to a table in order to find and work with a subset of the data in that table. The current filter is indicated by a hierarchical list of conditions—breadcrumbs—at the top of the table. For more information, see Using Filters and Breadcrumbs.

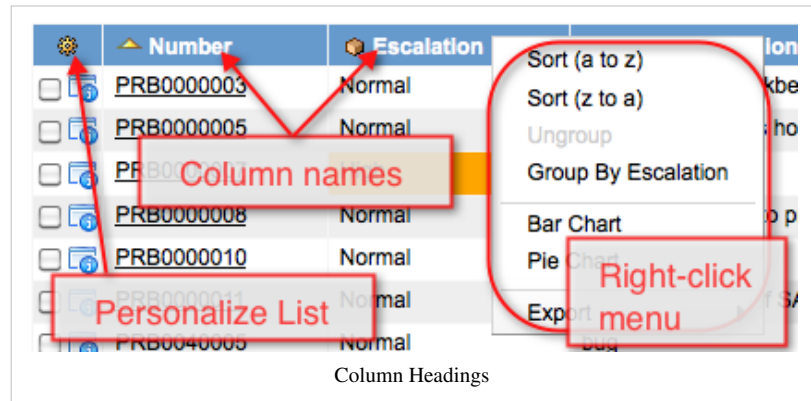


Column Headings

Column headings appear at the top of a list header. These headings display column names and provide some list controls. Column headings are stationary at the top of the list and do not scroll with list content, starting with the Eureka release.

The column headings provide the following controls:

- **Sorting:** Click the column name to sort the list in ascending order. Click again to sort in reverse order. An arrow to the right of the column name indicates the column currently being sorted as well as the sort direction.



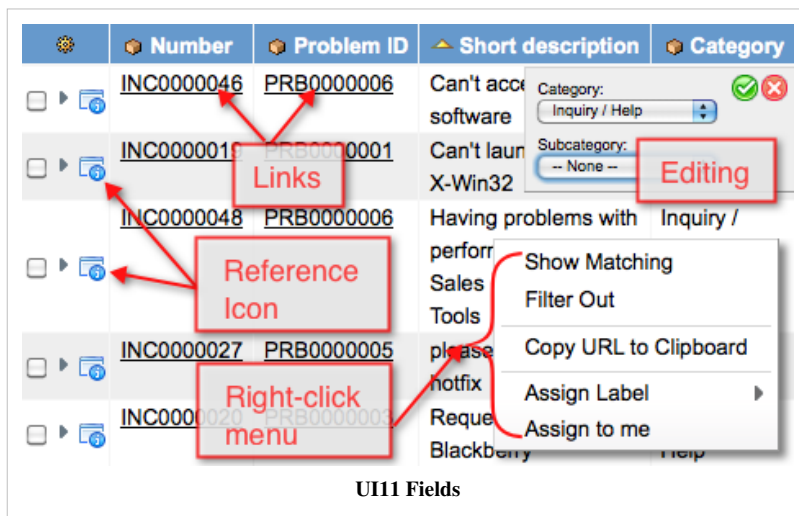
- **List context menu:** Access this menu, also called a right-click menu, by clicking the menu icon (☰) at the top of a list column (UI14) or by right-clicking the column heading. The list context menu offers these controls:
 - **Sort (a to z) and (z to a):** sort in ascending and descending order.
 - **Show Visual Task Board:** create a visual task board based on the current list (starting with the Eureka release).
 - **Group By:** aggregate records by a field. For more information, see Finding Information in Lists.
 - **Bar Chart and Pie Chart:** create quick bar and pie chart reports based on the filter criteria of the list. Users can then modify these reports or create gauges (depending on access rights). For more information, see Creating Reports.
 - **Personalize** (requires access rights): provides administrative functions related to the information displayed and how it is controlled.
 - **Import** (administrators only): import data from an XML file.
 - **Export:** exports data to Excel, CSV, XML (administrators only), or PDF. For more information, see Exporting Data.
 - **Update Selected and Update All** (administrators only): change applicable field values. For more information, see Editing Lists.
- **Personalize List** (⚙️): customizes the list layout for the current user. For more information, see Creating Personal Lists.
- **Search** (🔍): (UI14) enables the column search.




Note: Some of the options displayed on the list context menu depend on the user role and the installed applications.

Fields

Fields display data and provide the following functionality.



- **Links:** open the associated record in form view. Click the reference icon or first column field to open the current record. You can also click a link to a related record in other columns to go to that related record.
- **Editing:** changes the information in one or more records. For more information, see Editing Lists.
- **Reference Icon** (): provides detailed information about the record. Point to the reference icon

to open a pop-up window, or click it to open the record in form view. For more information, see Reference Icon.

- **Context menu:** also called a right-click menu, offers the following options:
 - **Show Matching** and **Filter Out:** provide quick filter options.
 - **Copy URL to Clipboard:** copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
 - **Copy sys_id** (administrators only): copies to the clipboard the sys_id of the record. Follow browser instructions if browser security measures restrict this function.
 - **Assign Tag** (UI14) : allows the user to assign a new or existing tag or label to a record, which provides quick access to frequently referenced or urgent information. When a tag is assigned to a record in UI14, the record is displayed on the Tagged Documents page.
 - **Assign to me, Approve, and Reject:** provide quick edit options.
 - **Add to Visual Task Board:** allows users to add the selected record to visual task boards they own



Note: Some of the options displayed on the field context menu depend on the user role and the installed applications.

Field Status Indicators

Field status indicators are used to highlight certain fields on lists and to provide status information.

- In UI14, field status indicators on lists can be displayed as a colored circle on the left side of the field or using a field background color.

All UI versions display field status indicators for mandatory fields only, starting with the Eureka Release. Previous versions also display field status indicators for modified and read-only fields.

To select the style of the field status indicator in UI14:

1. Click the personalize list icon () in the upper left corner of a list.

2. Select the **Modern cell coloring** check box to use the UI14 style field status indicator. Clear this check box to use the UI11 and classic style.
3. Click **OK**.

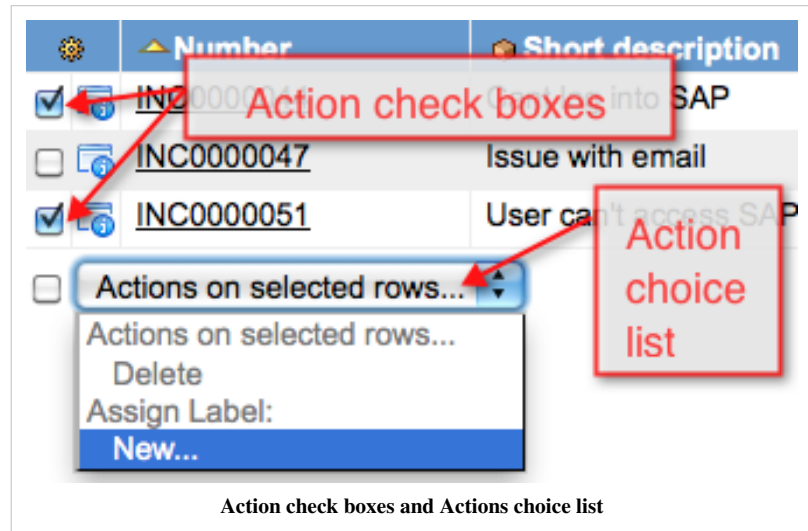
For more information, see [Creating Personal Lists](#).

Action Check Boxes

Action check boxes enable users to perform actions on selected items in a list.

To use action check boxes:

1. Select the check boxes beside the records you want to affect. To select all records on the page, go to the bottom of the list and select the check box beside the **Actions** choice list.
2. Apply the desired action.
 - **UI14:** in the column list context menu, **Update Selected** records using an editing form. For more information, see [Editing Lists](#).

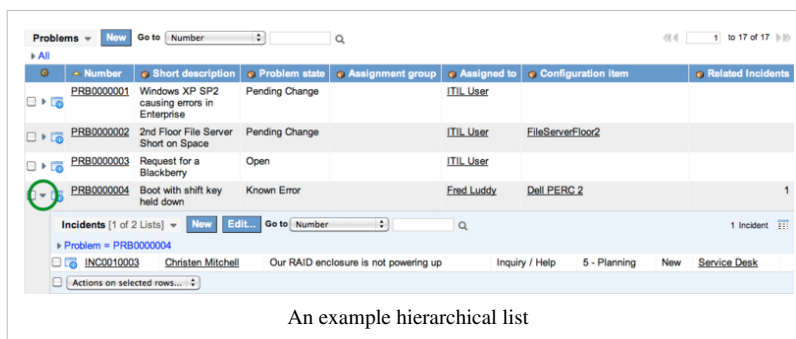


- In the **Actions** choice list, **Delete** (administrators only), **Show on Live Feed**, **Assign Tag**, or **Remove Label** (if applicable). For more information, see [Creating and Using Labels](#).

Hierarchical Lists

Lists can have sublists in a hierarchy that can also be accessed in list view. Hierarchical lists allow users to view records from related lists directly from a list of records without navigating to a form.

To expand or collapse the related lists on a record in a hierarchical list, click the arrow (▶) beside the reference icon.



See [Hierarchical Lists](#) for more information on how to enable and use this feature.

Embedded Lists

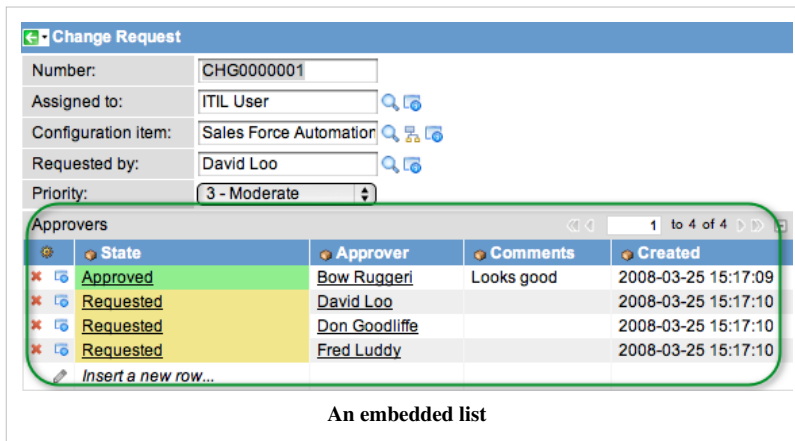
Some lists may be embedded in forms. Changes to embedded lists are saved when the form is saved. For more

information, see [Editing in Forms](#).

Use these controls to work with an embedded list:

- To expand or collapse an embedded list, click the expand (⊕) or collapse icon (⊖) in the list header.
- To add a new row, double-click **Insert a new row...**

- To edit a row, double-click in an empty area of the field. See Using the List Editor.
- To delete a row, click the delete icon (✖) beside the row.
 - New rows are removed immediately.
 - Existing rows are designated for deletion when the record is saved. To clear this designation, click the delete icon again.



The screenshot shows a 'Change Request' form with fields for Number (CHG0000001), Assigned to (ITIL User), Configuration Item (Sales Force Automation), Requested by (David Loo), and Priority (3 - Moderate). Below these fields is an embedded list titled 'Approvers'. The list has columns for State, Approver, Comments, and Created. It contains four rows: one 'Approved' row by Bow Ruggeri and three 'Requested' rows by David Loo, Don Goodliffe, and Fred Luddy. Each row has a delete icon (✖) to its left. A green box highlights the entire list area.

State	Approver	Comments	Created
Approved	Bow Ruggeri	Looks good	2008-03-25 15:17:09
Requested	David Loo		2008-03-25 15:17:10
Requested	Don Goodliffe		2008-03-25 15:17:10
Requested	Fred Luddy		2008-03-25 15:17:10

An embedded list

Navigating to a List

To open a list using the application navigator, click the list name or type the table name followed by `.list` in the application navigator filter. For more information, see Navigating Applications.

To open a list using a URL, append the table name and `_list.do` to the instance Web address. For example, the following URLs open the incident and

change request lists, respectively, in the demo instance:

`http://<instance name>.service-now.com/incident_list.do`

`http://<instance name>.service-now.com/change_request_list.do`

To open a list in the content frame using a URL, add `nav_to.do?uri=` to the list Web address, as in the following examples:

`http://<instance name>.service-now.com/nav_to.do?uri=incident_list.do`

`http://<instance name>.service-now.com/nav_to.do?uri=change_request_list.do`

Filters, views, and other parameters can also be applied using a URL. For more information, see Navigating by URL.



Note: Consider creating bookmarks for commonly viewed lists.

Displaying Activity Streams

Change Requests

New

Go to Number

1 to 16 of 16

All > Active = true

Number	Short description	Approval
CHG0030001	Please make the following DNS change to x.dot.com	Approved
CHG0000015	Unix update	Approved
CHG0000014	CMS App FLX (depends on Java Apps FLX)	Approved
CHG0000013	Oracle FLX (Java App Dependency)	Approved
CHG0000012	Java App Server	Approved
CHG0000011	Another Java Application Server change	Approved
CHG0000010	Java Application Server change	Approved
CHG0000009	Apply patches 10.2.0.1 to 10.2.0.3	Approved
CHG0000008	Install new Cisco	Requested
CHG0000007	R&D wants to know what it'd cost to switch them over to Linux desktops	Rejected
CHG0000006	Put another 100 Gb drive on the 2nd Floor Server	Not Yet Requested
CHG0000005	Install new PBX	Approved

Activity Stream

Please make the following DNS change to x.dot.com

Impact 3 - Low

Opened by System Administrator

Priority 4 - Low

6 hours ago by System Administrator

Posted in CHG0030001

Reply

Apply patches 10.2.0.1 to 10.2.0.3

Assigned to Bow Ruggeri

Configuration item SAP ORA01

Impact 3 - Low

Opened by ITIL User

Priority 1 - Critical

18 hours ago by ITIL User

Posted in CHG0000009

Reply

Rollback Oracle Version

Assigned to ITIL User

Configuration item Sales Force Automation

Impact 3 - Low

Opened by System Administrator

Priority 3 - Moderate

6 months ago by System Administrator

Posted in CHG0000001

Reply


Activity Stream Window

the activity stream.



Note: Activity streaming is available for Internet Explorer 9 and higher.

You can stream live activity information for all records on the current list. This feature is available starting with the Eureka release when UI14 is enabled.

To view this information, click the list activity stream icon () in the list title bar. This icon appears in the title bar for all task tables.

The live stream information appears in a flyout window, and is the same information that appears in the activity formatter for a record. The information in the flyout window updates automatically with audit and journal entries. Click the x at the top to close

Finding Information in Lists

Overview

Users can quickly find information in a list by searching, sorting, and grouping the list.

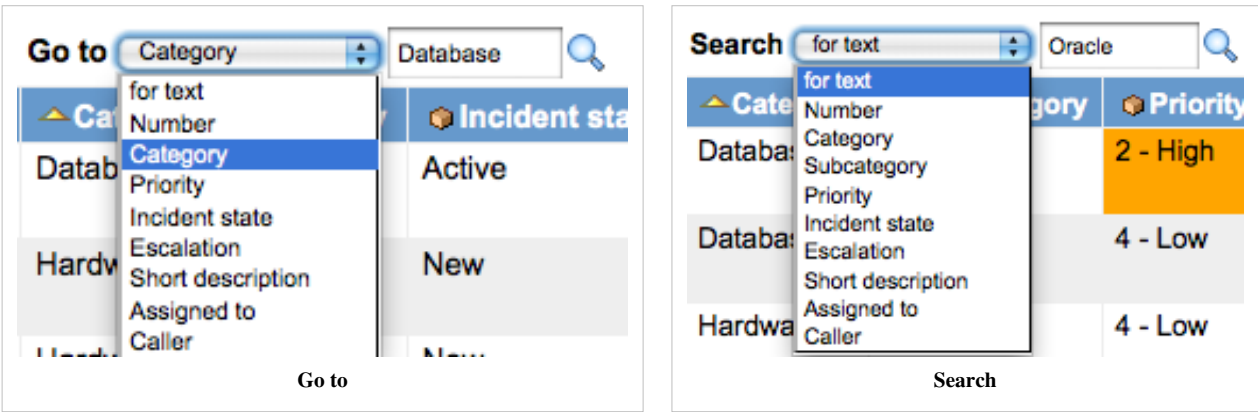
Searching a List

The list title bar includes options for searching the list. Administrators can enable text searches for any list.

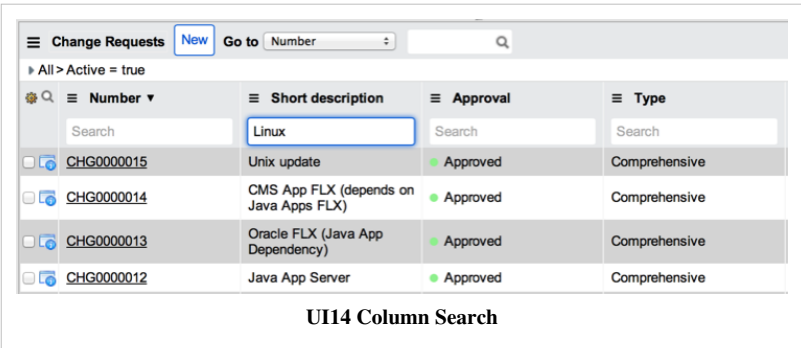
To search a list:

1. Select a field (for **Go to**) or select **for text** (for **Search**).
2. Enter the search text and press **Enter** or click the search icon (🔍).
 - **Go to:** for most fields, sorts by the selected field and returns records where the field value is equal to or greater than the search term. For the **Number** field, which is a string type field, finds the records that have a number ending with the number that you enter. For example, searching a list of incidents by selecting **Number** and entering **4** shows records with numbers like **INC0000004** and **INC0000014**.
 - **Search:** returns records that contain the search term in any field.

Use wildcards to further refine list searches.



Searching Individual Columns



In addition to searching by field or for text, you can also search individual columns in a list. This search supports queries that include AND, but does not support OR.

1. Expand the column headers and add a search field to each column by clicking the search icon (🔍) beside the personalize list icon (⚙).
2. To search a single column, enter the search text in the desired column search field and press **Enter**.

You can also use wildcards to further refine column searches. For example, use the ***** to define a *contains* search.

The search returns records that match the search term.

3. To search multiple columns, do one of the following:

- Enter the search text in each of the desired column search fields and press **Enter**.
- Search an individual column and then search additional columns based on the results of the first search.

Each time you enter search criteria in a column search field and press **Enter**, the results will narrow.

To clear a column search:

- Delete the text in the search field for the desired column and press **Enter**. This returns results for any remaining column search criteria.
- Delete the text in all of the column search fields to return all records in the list.

Sorting a List

To sort a list, use one of the following methods:

- Click a column name to sort the list in ascending order. Click again to sort in reverse order.
- Right-click a column name and select **Sort (a to z)** or **Sort (z to a)** to sort in ascending or descending order, respectively.
- Specify a sort order with a filter. Filters provide for sorting by more than one column (for example, by *Category* and then *Subcategory*). To learn more, see *Using Filters and Breadcrumbs*.

The current sort order is indicated by an arrow next to the column name (▲, up for ascending and down for descending). Only the primary sort order is indicated. Note that you cannot sort a list by an array-based field, such as a Glide list.

Grouping Items in a List

Grouping aggregates a list by a field and displays the record count per group. Grouping can help you find data quickly by organizing and providing a summary of search or filter results. For example, this picture shows active incidents grouped by caller.

	Number	Caller	Category	Priority	Incident state	Escalation	Sh
▶ Caller: Bow Ruggeri (4)							
▼ Caller: Bud Richman (4)							
<input type="checkbox"/>	INC0000046	Bud Richman	Software	3 - Moderate	New	Normal	Can't i
<input type="checkbox"/>	INC0000052	Bud Richman	Software	1 - Critical	New	Overdue	SAP F applica down
<input type="checkbox"/>	INC0000039	Bud Richman	Network	1 - Critical	Active	Overdue	Routin
<input type="checkbox"/>	INC0000040	Bud Richman	Inquiry / Help	3 - Moderate	Resolved	Overdue	Javasi
▶ Caller: Carol Coughlin (1)							

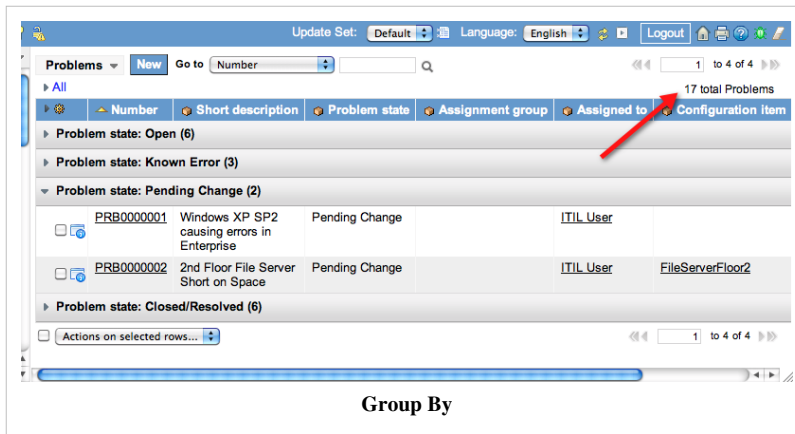
Group By

To group items in a list, use one of these methods:

- On the title bar, click the context menu and select **Group By**. Select the field by which to group the list. To remove a grouping, select **-- None --**.
- Right-click the column name and select **Group By**. To remove a grouping, select **Ungroup**.

To use a grouped list:

- Groups are named the values of the field selected for grouping.
- Record count per group appears next to the group name.
- The total number of items in the list (all groups combined) appears just below the paging controls in the list. This is shown only when the list is grouped on a field.



- To expand or collapse a group, click the arrow (▶) next to the group name.
- To expand or collapse all groups, click the arrow at the top of the list.
- To open the full list for a group, click the group name.
- The maximum number of records shown per group is the number of records per page in list view.
- To see all records for a given

group, open the full list.

- To change the number of records per page, click the title menu and select **Show**.
- The maximum number of groups shown is 100 by default, but may be configured by an administrator.

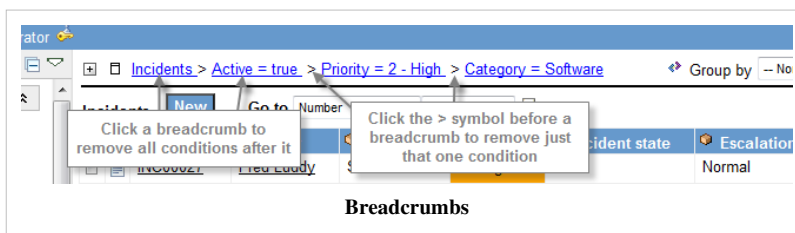
Using Filters and Breadcrumbs

Overview

A filter is a set of conditions applied to a table in order to find and work with a subset of the data in that table. Users can apply, modify, create, and save filters. The current filter is indicated by a hierarchical list of conditions—breadcrumbs—at the top of the table.

Breadcrumbs

Breadcrumbs offer a quick form of filter navigation. They are ordered from left to right, with the leftmost condition being the most general and the rightmost condition being the most specific. Clicking a breadcrumb removes all of the conditions to its right. Clicking the condition separator (>) before a condition removes only that condition.



In the example, clicking **Priority = 2** removes the condition **Category = Software** and returns all active incidents with a priority of 2. By contrast, clicking the condition separator (>) before **Priority = 2** removes the condition **Priority = 2**

and returns all active incidents in the software category. In both cases, removing a condition returns a larger results set. Finally, clicking **Incidents** goes to the top of the hierarchy, removing all conditions and returning all incidents in the system.

Click a breadcrumb to refresh the list of records and show the latest information from the database for those records.

Breadcrumb Context Menu

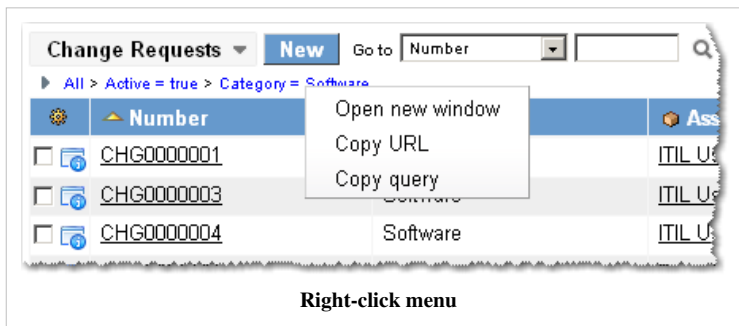
Additional navigational functions are available. Right-click a breadcrumb and select one of the following:

- **Open new window:** opens the results list for the breadcrumb in a new tab or window.
- **Copy URL:** copies to the clipboard the URL for the results list of the breadcrumb. Follow browser instructions if browser security measures restrict this function.
- **Copy query:** copies to the clipboard the encoded query for the breadcrumb. You can use this query in the URL of an instance or in the reference qualifier field of a dictionary entry.

For example, if you are viewing a list of all active incidents with a high or medium impact, right-click the breadcrumb and copy the query `active=true^impact=1^ORimpact=2`. You can append this query to the end of the instance URL:

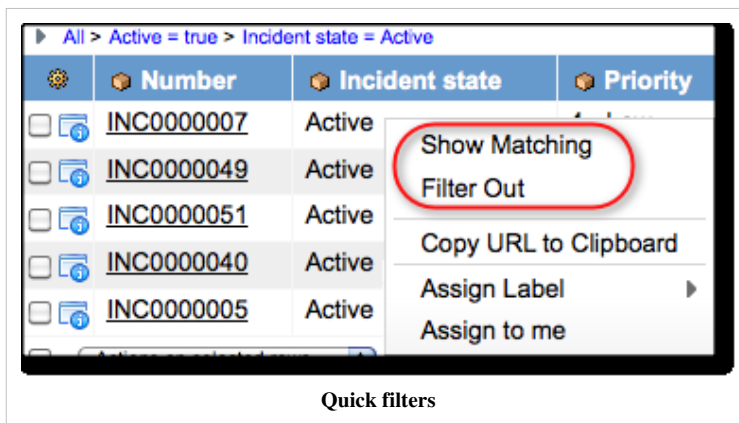
`https://{instance_name}/incident_list.do?sysparm_query=active=true^impact=1^ORimpact=2`.

This selection is not available for the **All** breadcrumb. Follow browser instructions if browser security measures restrict this function.



Quick Filters

To quickly filter a list using a value in a field, right-click in the field and select **Show Matching** or **Filter Out** (for date fields choose from **Show Before**, **Show After**, and **Filter Out**). These functions add a condition as a rightmost breadcrumb of the current filter.





In this example, right-clicking **Active** and selecting **Show Matching** adds the condition `Incident state = Active` as the most specific condition of the filter. By contrast, right-clicking **Active** and selecting **Filter Out** adds the condition `Incident state != Active` as the most specific condition of the filter.

For date and date-time fields you can also use **Show After** or **Show Before** to define a time based filter.


Creating Filters

A filter restricts what records appear in a list by providing a set of conditions each record must meet to be included in the list. A condition consists of these parts:





- **Field:** Each field contains data from a particular column in the list's table. Selecting a reference field allows you to dot-walk to data from other tables.
- **Operator:** Each field type has its own set of valid operators. The operator sometimes also determines if a value is needed.
- **Value:** Each field has its own set of valid values determined by the field type. Reference fields have access to auto-complete, and choice lists provide a drop-down list of options.
- **Grouping:** Each condition line is grouped with either an AND or OR connector. The filter requires all condition lines linked with an AND connector to be met. The filter evaluates each condition line linked with an OR connector separately.

Create filters on a list using the condition builder. To make the condition builder appear every time you open the list, click the Pin/Unpin Filter icon  /  so that the pin is pressed down.

To create a filter:

1. Open the condition builder by clicking the arrow () beside the breadcrumbs.
2. Select a **field** from the drop-down list.

The field type determines the available operators and values. For example, the **Active** field may have a value of *true*, *false*, or *empty*, while a text field may have many different values. Similarly, the **greater than** operator does not apply to the **Active** field, but it does apply to the **Priority** field. For more information, see Condition Builders.

3. Select an **operator** from the drop-down list.
4. Select or enter a **value**, if appropriate.
5. Add or remove conditions to construct the desired filter:
 - To add a top-level condition, click **Add AND condition**  or **Add OR condition**  on the condition builder tool bar, above the conditions.
 - To add a dependent condition, click **Add AND condition** or **Add OR condition** beside the condition.
 - To remove a condition, click **Delete**  beside the condition.
6. To specify the sort order of the results, click **Add Sort** , then select a **field** to sort by and a sort **order**.
7. Click **Save** to keep the filter for future use. For more information, see Saving Filters.
8. Click **Run** to apply the filter.



Note: To find all records that do not contain the specified value, create a filter with two conditions: *[field] [is not] [value] or [field] [is] [empty]*.

Using OR Conditions

The condition builder uses two different types of OR conditions, top level and dependent.

Using a dependent OR condition, you can specify alternative criteria to a single operation. Dependent OR conditions work in the manner A and (B or C).

For example, to return a list of all unassigned problem and incident records from the Task table, create a filter with a dependent OR on the **Number** field.

- **[Assigned to] [is] [empty] AND [Number] [begins with] [PRB] OR [Number] [begins with] [INC].**

Dependent OR condition

Number	Caller	Short description	Category	Priority	State	Assignment group	Assigned to
INC0000002		Can't get to network file shares	Software	4 - Low	New	Software	Howard Johnson
INC0000003	Joe Employee	Wireless access not available on floor 3	Network	4 - Low	New	Network	Beth Anglin
INC0000005		CPU load high for over 10 minutes	Software	2 - High	New		Charlie Whitherspoon
INC0000007	Joe Employee	Need access to sales DB for the West	Database	4 - Low	New	Database San Diego	David Loo
INC0000014	Bow Ruggeri	Missing my home directory	Hardware	4 - Low	New	Software	ITIL User

A top-level OR condition allows you to display the results of multiple filter criteria in a single list. Top level OR conditions work in the manner (A and B) or (C and D).

For example, to return a single list of all active incidents with a category of hardware, and all inactive incidents with a category of software, create two condition sets separated by a top-level

OR condition.

- [Active] [is] [true] AND [Category] [is] [Hardware]
- Top level **OR** condition
- [Active] [is] [false] AND [Category] [is] [Software]

Top level OR condition

Number	Caller	Short description	Category	Priority	State	Assignment group	Assigned to
INC0000002		Can't get to network file shares	Software	4 - Low	New	Software	Howard Johnson
INC0000003	Joe Employee	Wireless access not available on floor 3	Network	4 - Low	New	Network	Beth Anglin
INC0000005		CPU load high for over 10 minutes	Software	2 - High	New		Charlie Whitherspoon
INC0000007	Joe Employee	Need access to sales DB for the West	Database	4 - Low	New	Database San Diego	David Loo
INC0000014	Bow Ruggeri	Missing my home directory	Hardware	4 - Low	New	Software	ITIL User
INC0000015	Fred Luddy	I can't launch my personal application anymore	Software	4 - Low	New		Don Goodliffe

Top-level and dependent OR conditions can be used together. Filters using both types of OR conditions work in the manner (A or B) or (C or D). By mixing AND conditions with top-level and dependent OR conditions, you can create very specific filters.

Filtering on Multiple String Values

For a string field, you can create a filter that searches for multiple values by creating a comma delimited list. This feature enables administrators to copy and paste search criteria from a Microsoft Excel spreadsheet into a filter, for example.

1. Create the filter with the **is one of** or **is not one of** operator.

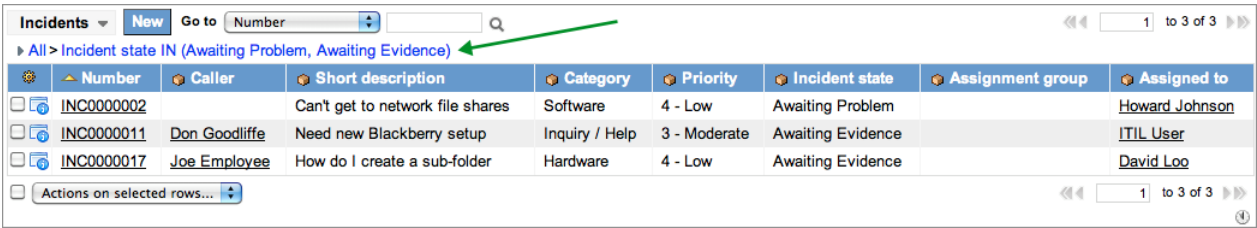
All selections from the field's choice list appear.

2. Select one or more of the options by using multiple selection key commands.

The choice list remains visible.

3. Click **Run** to filter the list.

The filter conditions appear as a comma-delimited string at the top of the results list.



Using the Dynamic Operator

The dynamic operator, **is (dynamic)**, lists predefined dynamic filter options where the condition value is computed from a value in a reference field. For example:

Field	Operator	Dynamic Filter Option	Description
Caller	is (dynamic)	Me	Computes the value of Caller based on the current user viewing the list.
Assignment group	is (dynamic)	One of My Groups	Computes the value of Assignment group based on the current user viewing the list.

Saving Filters

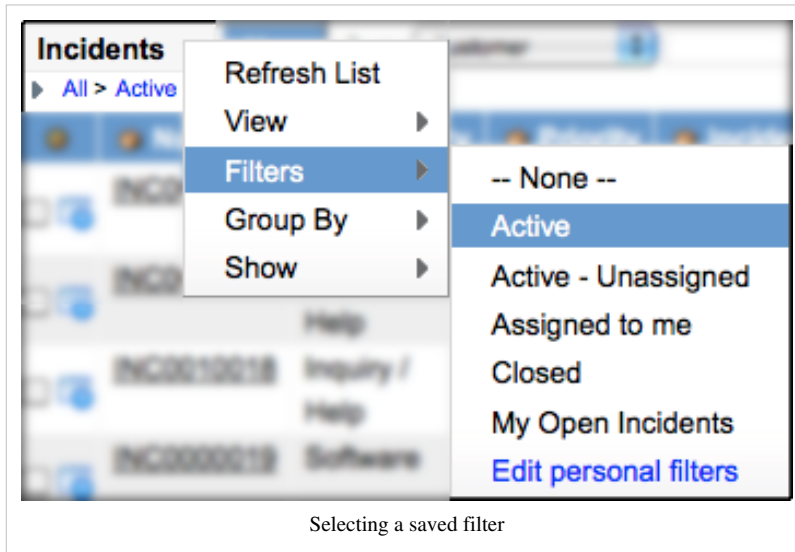
Depending on your access rights, you may save filters for everyone, a user group, or yourself.

To save a filter:

1. Create or modify a filter.
2. Click **Save**.
3. Enter a name for the filter in the **Save as** field.
4. Select who the filter is **Visible to**:
 - To create a personal filter (all users), select **Me**.
 - To create a global filter (requires access rights), select **Everyone**.
 - To create a filter for a specific user group (requires access rights), select **Group** and then enter or search for the group name.
5. Click **Save**.

Using Saved Filters

To apply a saved filter, select the filter name in the title menu. The filter runs and the breadcrumbs appear.



To edit or delete personal filters, select **Edit personal filters** from the title menu. The Filter [sys_filter] table opens with the filter **User = [current user]**. Filters created from this view are saved as personal filters for the current user.

Editing Saved Filters

An administrator can edit any filter.

1. Navigate to **System Definition > Filters**.
2. Select the filter you want to edit.

3. Modify the **Filter** conditions, as necessary.
4. Click **Update**.

Deleting Filters

Administrators can delete any saved filter: global, group, or personal.

1. Navigate to **System Definition > Filters**.
 - To see who created the filter and when, personalize the list to add the **created_by** and **created** fields.
 - To see who has access to the filter, personalize the list to add the **user**, **group**, or **domain** fields. Filters that are not assigned to a user or group are global.
2. Click the filter name and click **Delete**, then confirm the request.

Scripted Filters

The condition builder alone cannot create some filters, such as displaying a record set that is dependent on an unrelated table. Administrators with a knowledge of JavaScript can create JavaScript functions for use in advanced filters.

To use a scripted filter:

1. Create a new script include.
2. In the script include **Script** field, create a JavaScript function that returns an array of sys_ids.
 - Ensure that the function uses the same name as the script include.
 - Ensure that the script include is **Active** and **Client callable**.
3. Call the JavaScript function from the condition builder.

For more information, see GlideRecord queries and Script Includes.

Example

A company provides *intensive care* for a group of customers. To track these services, the service manager needs a high-level journal and links to all incidents that the customers raise.

The company creates a new application, *Intensive Care*, and a table, *u_intensive_care*. While the table contains a reference field for the customer name, there is no direct link to the user table. Thus, the manager cannot set up an incident list filter for customers who are under intensive care using the condition builder.

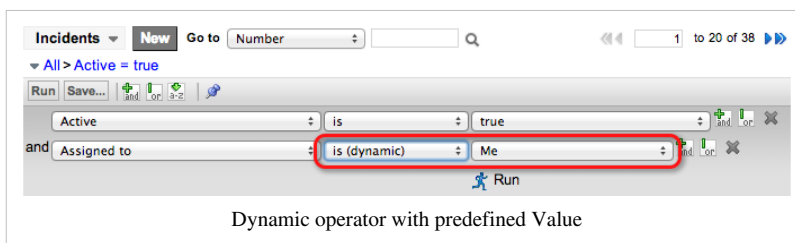
Solution

Write a JavaScript function that uses a GlideRecord query to build an array of user sys_ids in the *u_intensive_care* table (see sample code, below). Call the function from the condition builder in the Incident table (condition, **Caller is javascript:myFunction()**).

```
function myFunction() {
  var arrUsers = [];
  gr = new GlideRecord('u_intensive_care');
  gr.query();
  while (gr.next()) {
    arrUsers.push(gr.u_customer.toString());
  }
  return arrUsers;
}
```

Dynamic Filter Options

Dynamic filter options enhance filters by allowing users to run a set query against a reference field without having to enter JavaScript code in the condition builder. All dynamic filter options use the **is (dynamic)** operator and call a particular scripted filter.



Dynamic filter options are active by default starting with the Dublin release.

To create a dynamic filter option:

1. Create a scripted filter as a client-callable script include or business rule.
2. Navigate to **System Definition > Dynamic Filter Options**.
3. Click **New**.
4. Enter the Dynamic Filter Option form fields (see table).
5. Click **Submit**.

Field	Description
Label	Enter the text you want to appear as an option when a user selects the is (dynamic) operator.
Script	Enter the name of the function you created.
Field type	Select Reference .
Reference script	Select the client-callable script include or business rule you created for the scripted filter.
Referenced table	Select the table this filter option applies to.
Available for filter	Select this option to display the option as a filter breadcrumb.
Order	Enter a number to designate the placement of this option in the filter option choice list.
Roles	Select the role a user must have to see this option.
Active	Enable or disable the option.

Default Dynamic Filter Options

The following dynamic filter options are available by default.

Target Table of Reference Field	Option Label	Description
User [sys_user]	Me	The reference field contains the current user.
	One of My Assignments	The reference field contains the current user or someone for whom the current user is a delegate <i>for assignments</i> .
	One of My Approvals	The reference field contains the current user or someone for whom the current user is a delegate <i>for approvals</i> .
	Users With Roles	The reference field contains users that have any role.
Group [sys_user_group]	One of My Groups	The reference field contains a group to which the current user belongs.

Enhancements

Eureka

- After you run a filter on a list, the column search fields are displayed and filled in with the corresponding search criteria.

Editing Lists

Overview

Users can edit data in lists using a variety of methods:

- **Quick edit functions:** change applicable field values using the right-click menu.
- **List editor:** edit field values in a list without opening a form.
- **Multiple records:** edit more than one record at the same time using the list editor or an editing form.

Quick Edit Functions



To edit a record in a list using quick edit functions, right-click a field and select the appropriate function:

- **Assign to me:** for records that use assignments, adds the logged in user's name into the **Assigned to** field.
- **Approve:** for records that use approvals, changes the record's approval state to **Approved**.
- **Reject:** for records that use approvals, changes the record's approval state to **Rejected**.

Using the List Editor

The list editor allows users to edit field values directly from a list without navigating to a form. Administrators can configure the list editor. By default, list editing is disabled for some tables. Fields of certain types cannot be edited from lists.

To use the list editor:

1. Double-click (or click, if you have personalized the list editor) in an empty area of the field. The appropriate editor for the field type opens. You can also use keyboard navigation to access the list editor.
 - Before the list editor opens, access rights to edit the field are verified. A loading indicator appears if this process takes longer than expected.
 - If the field has a dependency relationship (for example, *Category* and *Subcategory*), then a composite editor opens to allow editing of all dependent fields. You must have rights to edit all dependent fields to use the list editor.
2. Enter the appropriate values and click **Save** (), or click **Cancel** () to retain the original value.

Incidents	New	Search	for text
Number	Category	Priority	
INC00001	Request	1 - Critical	
INC00002	Software	4 - Low	
INC00003			
INC00004	Network		
INC00005			
INC00006			
INC00007	Database	4 - Low	
INC00008	Inquiry / Help	4 - Low	

List editor

Using Keyboard Navigation for List Editing

Users can use spreadsheet-like keyboard navigation to edit data in list view.

To use keyboard navigation for list editing:

1. Navigate to the list you want to edit.
2. Press **Tab** until the first field in the list is selected (highlighted).
3. Use any of the following key combinations to navigate through the list until the field you want to edit is selected.
 - Move right: **Tab** or the **Right Arrow** key.
 - Move left: **Shift + Tab** or the **Left Arrow** key.

- Move down: the **Down Arrow** key.
- Move up: the **Up Arrow** key.

To select multiple fields in the same column, hold **Shift** and press the **Down Arrow** or the **Up Arrow** key.

4. Press **Enter**. The list editor opens.
5. Enter a new value. To add a new line in a multi-line text field, press **Shift + Enter**.
6. Save or cancel your changes in one of the following ways:
 - Press **Enter**. The new value is saved and the field below the edited field becomes selected.
 - Press **Tab**. If the list is configured to save immediately, the new value is saved. If the list is configured to save data by rows, an indicator appears beside the value and the list editor opens for the next field. The row is saved only when you navigate away from the row or click the **Save** (💾) button beside the row.
 - Press **Ctrl + Enter**. If the list is configured to save immediately, the new value is saved. If the list is configured to save data by rows, an indicator appears beside the value and the current field remains selected.
 - Press **Esc**. The list editor closes without saving changes and the field remains selected.



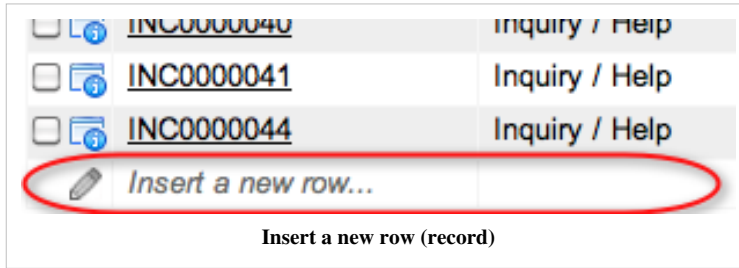
Note: Depending on the browser you are using, you may use different key combinations to edit certain field values. For example, to edit a choice list using Chrome, press the Spacebar.

Creating New Records

Users can create new records in list view. Administrators can configure the list editor to enable this feature for lists.

To create a new record in list view:

1. Navigate to the empty row at the bottom of the list.
2. Open the list editor for a field in the row and enter a value.
3. Save or cancel your changes.



Personalizing the List Editor

To personalize the behavior of the list editor:

1. Open the list.
2. Click **Personalize List** () in the upper left corner.

- To allow the list editor to open for the list, select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening for the list.
- To open the list editor with a double-click, select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.

Editing Multiple Records

All users can edit multiple records at the same time using the list editor. Administrators and users with the `list_updater` role can edit multiple records at the same time using an editing form. If you want to update a single field on multiple records to have the same value, the list editor is the quickest method. If you want to edit multiple fields or fields that do not appear in the list view, use an editing form.

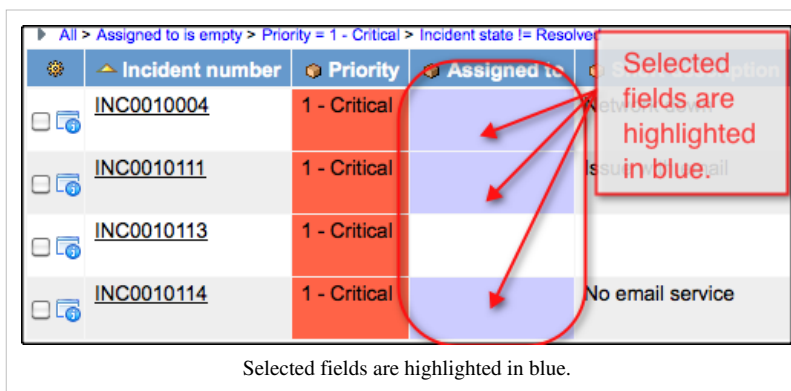
To edit multiple records in a list using the list editor:

1. Select the records you want to edit:
 - To select multiple consecutive fields, hold **Shift** and *drag* in the desired fields, or select a cell and then press **Shift + Up Arrow** or **Shift + Down Arrow**.
 - To select multiple non-consecutive fields, press **Shift** and click in one of the desired fields, then hold **Shift + Ctrl** (**Shift + Command** on Mac), and *click* in the desired fields.

2. Open the list editor by double-clicking (or clicking, depending on setup) in an empty area of the field.

The number of selected rows that will be edited is indicated. If any rows cannot be edited (due to security constraints), that is indicated.

3. Enter the appropriate values and click **Save**.



To edit multiple records in a list using an **editing form** (administrators and users with the `list_updater` role):

1. Select the records to edit in one of the following ways:
 - Select the check boxes in the record rows.
 - Select a field in the record rows.
 - Filter the list to show only the rows you want to edit.

2. Right-click the column header and select **Update Selected** or, if you filtered the data, select **Update All**. An editing form opens.
3. Enter appropriate values in any of the fields and click **Update** to save your changes in all selected records.

Creating Personal Lists

Overview


Personal lists modify a specific list view according to individual preferences. Users can create personal lists. Administrators can manage the personal lists function.

Personal list layout options include:

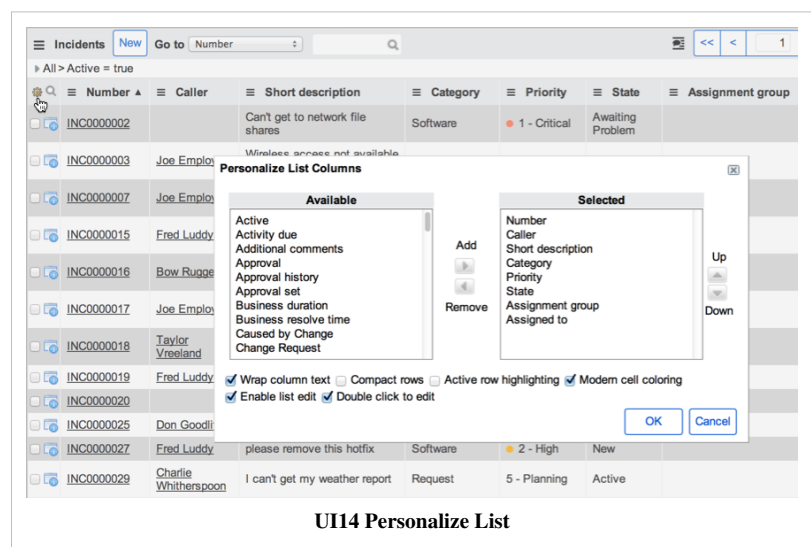
- Column selection and order
- Row spacing
- Text wrapping
- List editing
- List highlighting

Personalizing a List

To personalize a list:



1. Open the list.
2. Click the personalize list icon () in the upper left corner.
3. Use the slushbucket to select the columns and the desired order.

The first non-reference field automatically links to the form view of the record. For this reason, consider using the record number as the first column in your personal list layout.



4. Select display options.
 - To display long text on more than one line, select the **Wrap column text** check box. Clear the check box to display text on one line.
 - To condense the vertical space between rows, select the **Compact rows** check box. Clear the check box to use standard row spacing.
 - To highlight list rows as the cursor passes over them, select the **Enable list highlighting** check box. Clear the checkbox to restore the static, alternate row highlighting.
 - To use updated field status indicators available in UI14, select the **Modern cell coloring** check box. Clear the check box to use field status indicators available in UI11 and the classic interface.
5. Select list editing options (requires setup).
 - To allow the list editor to open for the list, select the **Enable list edit** check box. Clear the check box to prevent the list editor from opening for the list.
 - To open the list editor with a double-click, select the **Double click to edit** check box. Clear the check box to open the list editor using a single click.

**Note:**

- To reset a list to the default layout, click the personalize list icon () and select the **Reset to column defaults** check box.
 - If a list is personalized, an indicator () appears in the upper left corner.
-

Managing Records in Forms

Forms

Overview

A form displays information from one record in a data table. The specific information depends on the type of record displayed. Users can view and edit records in forms. Administrators can customize forms.

The form interface contains the following elements:

- **Form header:** appears at the top of the form and provides navigational and functional controls. For more information, see Form Header.
- **Fields:** display individual items of data for the record. For more information, see Fields.
- **Sections:** group fields under a header. Users may collapse or display sections using tabs.
- **Related links:** provide access to additional functions based on record type and system setup. Administrators can add related links to forms using UI actions.
- **Related lists:** display records in another table that have a relationship to the current record. For more information, see Using Related Lists.
- **Embedded lists:** allow for editing related lists without having to navigate away from the form. Changes are saved when the form is saved. For more information, see Embedded Lists.
- **Response time indicator** (🕒): appears at the bottom right of some forms to indicate the processing time required to display the form. For more information, see Response Time Indicator.

Form Header

The form header displays the title of the form (table) and provides a number of controls.

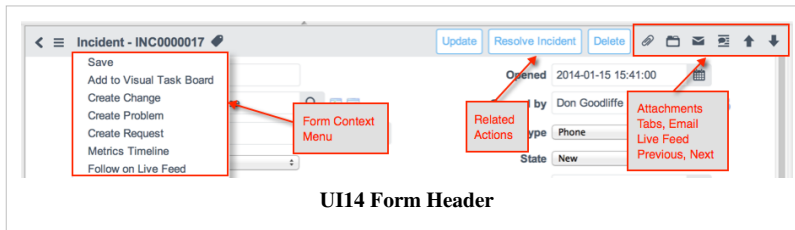
The screenshot shows the 'Change Request' form interface. Red boxes and arrows highlight the following elements:

- Form Header:** The top section containing the title 'Change Request', navigation buttons (Update, Delete), and a list of fields (Number, Requested by, Category, Priority, Approval, Type, State, Assigned to).
- Fields:** Individual data entry points within the form header.
- Sections:** A tabbed interface with 'Notes', 'Schedule', and 'Planning' tabs.
- Embedded List:** A list of 'Affected Locations' with a search bar and a table showing 'San Diego North'.
- Related Links:** A section with links like 'Calculate Risk', 'Check Conflicts', 'Show Workflow', and 'Workflow Context'.
- Related Lists:** A section showing related records, including 'Affected CIs', 'Impacted Services/CIs', 'Approvers (6)', 'Change Tasks (6)', and 'Problems (1)'.

The bottom of the form displays a table of 'Problems' with columns for Number, Short description, State, Assignment group, Assigned to, and Con. The table shows one record: PRB0000006, Can't access SFA software, Known Error, ITIL User, and Sales F.

UI14 Form Elements

UI14



The UI14 form header includes the following controls:

- **Back** (<): navigates to the previously viewed page without saving changes.
- **Form context menu** (≡): also

called a right-click menu; appears when a user clicks the menu icon beside the form title or right-clicks the form header.

- **Edit Tags** (🏷): displays the **Add tag** field below the form header, which allows users to create custom tags and categorize documents. For more information, see Tagging Documents.
- **Submit** or **Update**: saves changes and returns to the previously viewed page.
- **Related Actions**: provides standard actions in the form header for some tables, such as Close Incident or Resolve Incident in incident.
- **Delete**: deletes the record from the list.
- **Attachments** (📎): allows users to view and add attachments to the record. For more information, see Uploading Attachments.
- **Toggle tabs** (📁): toggles between tabbed and sequential arrangements of form sections and related lists.
- **Annotations** (?): displays on-form annotations. For more information, see Annotating Forms.
- **Email** (📧): opens an email window.
- **Show Live Feed** (📺): opens the document feed for this record in a flyout window.
- **Previous** (⬆) and **Next** (⬇): open the previous and next record on the list from which the record was accessed. These controls save changes to the record.

Form Context Menu

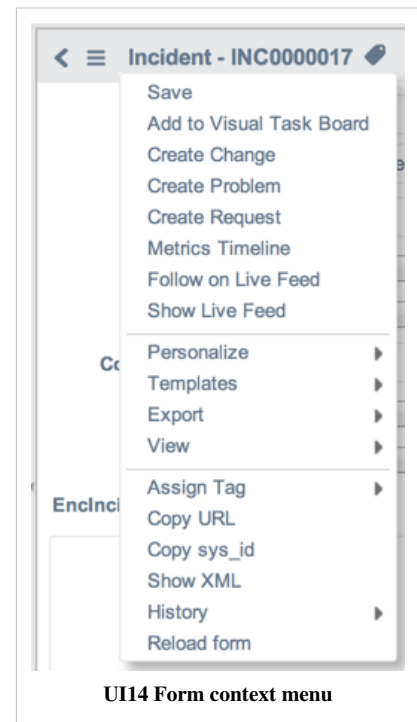
The form context menu provides controls based on the table and user access rights. Administrators can customize some of the options available on a context menu using UI actions.

Access the form context menu by clicking an icon or by right-clicking the form header.

- **UI14:** click the Menu icon (☰) beside the form title.

Available options include:

- **Save:** saves changes without leaving form view.
- **Add to Visual Task Board (UI14):** adds a card for this record to a freeform task board. For more information, see Using Visual Task Boards.
- **Related actions:** provides standard actions in the form context menu for some tables, such as Create Change in incident.
- **Insert and Insert and Stay:** save the data to a new record instead of updating the current record. For more information, see Inserting a Record.
- **Personalize and Templates:** provide administrative functions, including personalizing forms and creating templates.
- **Export:** exports data to PDF. Administrators can also export to XML. For more information, see Exporting Data.
- **View:** changes fields to a predefined layout. Note that switching views submits the form, which saves all changes. Administrators can customize views.
- **Assign Tag (UI14) or Assign Label (UI11 and classic):** allows the user to assign a new or existing tag or label to a record, which provides quick access to frequently referenced or urgent information. When tag is assigned to a record in UI14, the record is displayed on the Tagged Documents page. When a label is assigned to a record in UI11 or classic, a link to the record is displayed in the application navigator under the assigned label. For more information, see Tagging Documents (UI14) or Creating and Using Labels (UI11 and classic).
- **Copy URL:** copies to the clipboard the URL for the form view of the record. Follow browser instructions if browser security measures restrict this function.
- **Copy sys_id (administrators only):** copies to the clipboard the sys_id of the record. Follow browser instructions if browser security measures restrict this function.
- **Show XML (administrators only):** displays record data in XML format.
- **History (administrators only):** displays audit history for the record (must be enabled for the table).
- **Reload Form:** reloads information from the database to refresh the form view.




UI14 Form context menu



Note: Some of the options displayed on the form context menu depend on the user role and installed applications.

Fields

A field represents an individual item of data on a record. Users can view and modify field data on a form. Fields may be configured as:

- **Mandatory:** requires a value before users can save the record.
- **Read-only:** prevents the current user from editing the field on the form.
- **Standard data entry:** accepts values such as numbers, text, choice lists, dates and times, and check boxes.
- **Specialized data entry:** accepts one or more of the following:
 - **Journal:** permits users to enter text. When the record is saved, journal field entries are listed under the input field, marked with the user name and timestamp (example, **Additional comments** on an incident).
 - **Suggestion:** provides the option to include predefined text in a text or journal field. For more information, see Suggestion Fields.
 - **Reference:** lets users select a record on another table (example, in an incident, the **Caller** field references the User table). Reference fields define a relationship between two tables. When a reference field is populated, point to the reference icon () beside the field to preview the referenced record, or click the reference icon to navigate to the record.
 - **Watch List:** allows multiple users to subscribe to notifications of a task. A watch list is a common type of *glide list*, which is a field that allows users to select multiple records from another table.
 - **HTML:** allows users to use HTML to define how field content renders (example, knowledge article text). HTML fields can include media elements, such as images, Web links, and videos.
 - **Wiki:** allows users to use Wiki markup to define how field content renders. For more information, see Wiki Fields.
 - **Image:** permits users to upload an image file (type of .gif, .jpg or .jpeg, or .png only).
 - **Video:** permits users to upload a video file.
 - **Normalized:** alters raw input to match standardized values for improved searching and reporting. For more information, see Normalizing and Transforming Field Values.
 - **Currency or Price** accepts monetary information. For more information, see Currency or Price.
 - **Translated HTML or Translated Text:** are similar to standard HTML or text fields, but can be translated if the Internationalization plugin is active. For more information, see Using Translated Text.
 - **Duration:** indicates a length of time. The field automatically converts hours to days for values greater than 24 hours. For example, 30 hours is converted to 1 day and 6 hours.
 - **URL:** accepts a URL (web) address and creates an active hyperlink.

See Introduction to Fields for more detailed information on fields.

Field Status Indicators

Indicators are used on some fields to denote a special field type.

UI14

An asterisk (*) to the left of a field name indicates a mandatory field. The user must enter a value to save the form. The mandatory field status indicator is red when a field is empty and changes to light red when the user enters a value.

Fields do not show the modified and read-only status indicators starting with the Eureka release.

Number

INC0010012

* Caller

Joe Employee

* Location

3030 High Point Rd, Greensboro NC

* Category

-- None --

* Subcategory




-- None --

Configuration item

UI14 Field Status Indicators

Sections




Sections provide headers for a group of related fields.

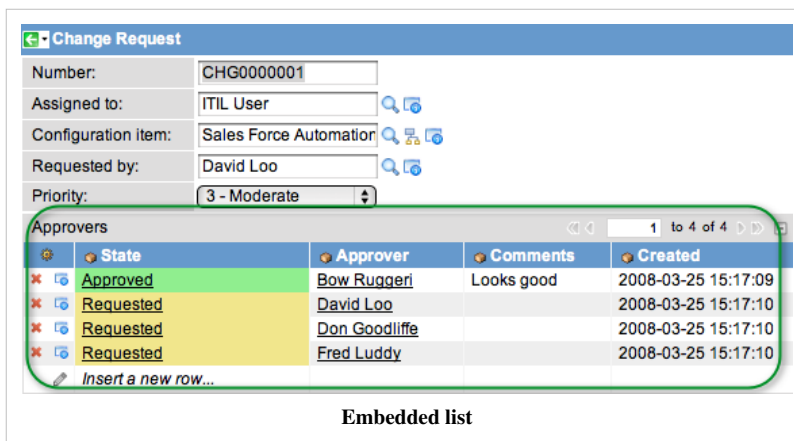
- To expand or collapse a section, click the expand () or collapse icon ().
- To toggle between tabbed and sequential arrangements of sections, click the toggle tabs icon ().

Embedded Lists

Some forms may show related lists as embedded. Changes to embedded lists are saved when the form is saved. For more information, see [Editing in Forms](#).

Use these controls to work with an embedded list:

- To expand or collapse an embedded list, click the expand () or collapse icon () in the list header.
- To add a new row, double-click **Insert a new row...**
- To edit a row, double-click in an empty area of the field. See [Using the List Editor](#).
- To delete a row, click the delete icon () beside the row.
 - New rows are removed immediately.
 - Existing rows are designated for deletion when the record is saved. To clear this designation, click the delete icon again.



Change Request

Number: CHG0000001

Assigned to: ITIL User

Configuration item: Sales Force Automation

Requested by: David Loo

Priority: 3 - Moderate

Approvers

State	Approver	Comments	Created
Approved	Bow Ruggeri	Looks good	2008-03-25 15:17:09
Requested	David Loo		2008-03-25 15:17:10
Requested	Don Goodliffe		2008-03-25 15:17:10
Requested	Fred Luddy		2008-03-25 15:17:10

Insert a new row...

Embedded list

Navigating to a Form

Users can navigate to the form for an existing record or to a blank form for creating a new record.

To open an existing record in form view, use one of these methods:

- Locate the record in a list and click the record number or the reference icon. For more information, see [Navigating Applications and Using Record Lists](#).

- Append the table name, followed by `.do?sysparm_query=number=` and the record number to the instance web address. For example, the following URL opens incident INC0000007:

`https://<instance name>.service-now.com/incident.do?sysparm_query=number=INC0000007`

Additional record parameters can be applied with a URL. For more information, see [Navigating by URL](#).

To open a blank form for a new record, use one of these methods:

- Open a list, such as Incident, and click **New**.
- In the navigation filter, type the table name followed by `.form`.
- Append the table name and `.do` to the instance web address. For example, the following URL opens a new Incident form:

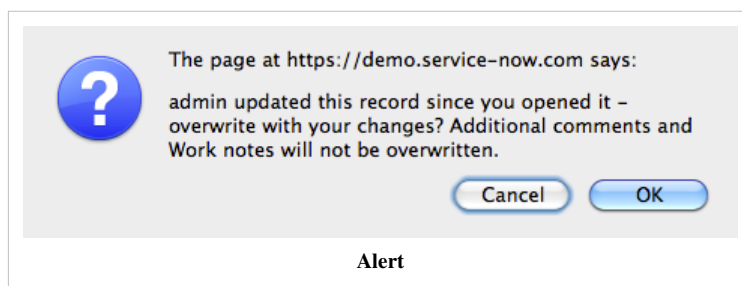
`https://<instance name>.service-now.com/incident.do`

Editing in Forms

To edit a record in form view:

1. Navigate to the form.
2. Enter appropriate data.
3. Save the record using one of these methods:
 - Click **Submit** or **Update** to save changes and return to the previously viewed page.
 - Right-click the form header and select **Save** to save changes without leaving form view.
 - Right-click the form header and select **Insert** or **Insert and Stay** to save the data to a new record instead of updating the current record (see Inserting a Record).
4. If the record has been changed by another user since you opened it, an alert may appear. Click **OK** to confirm your changes.

This alert is generated by the *Simultaneous Update Alert* client script.



Note: Depending on system setup, the data entered in a form may affect other options on the form or change its appearance. For example, if you select a status of **Closed** for an incident, a **Close Notes** field may appear and may be required to save the record. Administrators can create custom form effects in a variety of ways, including UI policies and client scripts.

Inserting a Record

Insert provides a method for creating multiple similar items, such as email notifications, users, groups, or business rules. Administrators may also enable the Insert function for task records.

To insert a record:

1. Open a similar item.
2. Edit the item and give it a new **Name**.
3. Click one of the following:
 - **Insert** saves the item as a new record and returns to the previously viewed page.
 - **Insert and Stay** saves and views the new record.

Canceling Changes

To cancel changes to a form, navigate away from the form view without saving the record. If a message appears, click **Leave this Page** to confirm cancellation.



Note: Administrators can disable the confirmation message by setting the `glide.ui.dirty_form_support` property to false.

Using Form Pane Tabs

When using the split screen feature, you can open multiple forms in the form pane. Form pane tabs appear above the form header. The current tab is highlighted with a blue bar. Form pane tabs are available starting with the Eureka release.

1. View a list in the content frame (for example, the Incident list).
2. Click the **List and Form View** button on the Edge to split the screen.

The list is displayed in the list pane on the left and an empty form pane with a new highlighted tab is displayed on the right.

3. Select an incident record in the list pane to display the incident in the highlighted tab.

The incident number appears in the tab at the top of the form pane.

4. Click the **+** tab to add a new tab to the form pane.

The new tab is added to the right of the current tabs and has the generic name **New Tab** until you select another incident from the list pane.

To remove tabs:

1. Select the tab to be deleted.
2. Click the **x** in the tab.

Tagging Documents


Tags enable you to categorize different documents in a ServiceNow instance and then view those documents on one page. The tagging feature, which is available in the UI14 interface, is similar to the labels feature in the UI11 interface.

Create new tags on forms and assign the tags to different documents. Then view the tagged documents or edit the tags on the Tagged Documents page. Tagging documents is available starting with the Eureka release.



Note: Tags are created per user and are not available system-wide.

Creating Tags

Create tags using the edit tags icon () at the top of a form. The tags you create appear below the form header and on the Tagged Documents page header.

1. Click the edit tags icon to expand the form header and display the **Add tag** field.
2. Click in the **Add tag** field and do one of the following:
 - Enter a new tag name and press Enter.
 - Select an existing tag from the choice list.

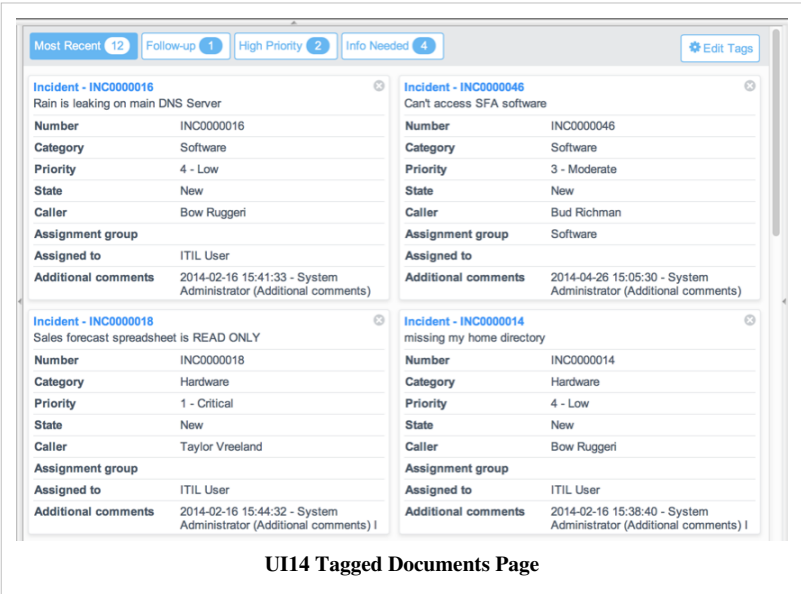
The tag is added to the form and a new **Add Tag** field appears. You can assign more than one tag to a document.

To remove a tag from a form, click the **x** beside the tag name.

Creating form tags

Viewing Tagged Documents

The Tagged Documents page displays recently viewed documents or user-tagged documents in the content frame. Access this page by clicking the **Tagged Documents** button on the Edge.



The page header contains a button for recently viewed documents and for each user-created tag.

- Click **Most Recent** to display the most recently viewed documents.
- Click any of the buttons for user-created tags to display the documents associated with that tag.

Individual preview areas display selected information for each document.

- Point to or click a document to expand the preview.
- Click the document title to open the form for that record.

- Click the remove tag icon (X) in the upper right corner to remove that tag and close the record preview.

Editing Tags

You can edit tags from the Tagged Documents page.

1. Click the **Edit Tags** button on the right side of the page header.

This enables editing for all of the tags on the Tagged Documents page header.

2. Click in a tag name and make the desired changes.
3. Click **Done** to save the changes.

All documents with that tag are updated to reflect the change.

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