**WEEK 1-What is ServiceNow**

* **Video 1-**
  + ServiceNow is a prominent company with over 17,000 employees and a diverse clientele, including major corporations like AT&T and Coca Cola. Its leadership includes notable figures like CEO Bill McDermott and founder Fred Luddy.
  + ServiceNow has received multiple accolades, such as being named one of Glassdoor’s Best Places to Work in 2022 in both the US and UK. This highlights its positive work environment.
  + The company serves a wide range of mid to large enterprises, showcasing its broad market appeal and strong customer base, which includes prestigious brands like Microsoft and Delta
  + Fred Luddy, the founder and current chairman, dropped out of college to pursue programming. His journey illustrates the innovation and passion that led to ServiceNow's creation.
  + Fred Luddy founded ServiceNow in 2003 to address the disconnect between information technology and business efficiency. His goal was to create a system that empowers businesses rather than frustrates them.
  + Fred Luddy aimed to transform the role of IT in businesses, making it a tool for revenue generation rather than just an expense. By creating ServiceNow, he facilitated intuitive interactions between business operations and IT solutions.
  + ServiceNow is a cloud-based platform that enables businesses to streamline their IT operations and workflows effectively. It offers a range of pre-built applications and customization options to meet unique business needs.
  + The platform provides robust data management with daily backups and a single enterprise-wide data model, enhancing reliability and integration across IT functions.
  + ServiceNow categorizes its applications into IT, Employee, Customer, and Creator Workflows, ensuring that businesses can easily find solutions tailored to their specific operational needs.
  + The company operates globally, with data centers strategically located across various regions to support its services, ensuring redundancy and accessibility for users worldwide.
* **Video 2-**

1. An overview of the ServiceNow platform covers its architecture, applications, workflows, user interfaces, and role-based access. It emphasizes the platform's cloud-based delivery model, multi-instance architecture, and security features. The session concludes with insights on user authentication and the importance of understanding the platform for certification preparation.
2. The video explains three main cloud delivery models: Infrastructure as a Service, Platform as a Service, and Software as a Service, and their distinct functionalities. Additionally, it introduces Application Platform as a Service, which integrates elements from all three models for enhanced business solutions.
3. ServiceNow aims to replace traditional IT departments with a cloud-based software solution that centralizes data within a single database model. This innovative approach streamlines operations across various workflows, enhancing efficiency.
4. ServiceNow's multi-instance architecture allows companies to have dedicated instances for increased control and security over their data. This architecture enhances upgrade scheduling and maintains data separation across instances
5. ServiceNow offers three primary user interfaces: the Now Platform UI, mobile apps for onboarding, and a customizable service portal for specific user groups. Each interface is designed to enhance user accessibility and experience.
6. Assigning permissions through roles rather than directly to users is recommended for better flexibility and management in ServiceNow. This approach simplifies changes when users move or roles are reassigned.

* **Video 3-**

The ServiceNow user interface (UI) is designed to provide an intuitive and efficient environment for users to interact with the platform's various functionalities. It allows users to navigate the system, perform tasks, search for data, and personalize their workspace. Understanding the key components of the UI helps improve productivity and makes it easier to manage workflows and applications.

1. Global Search Functionality

#### Overview:

The global search feature in ServiceNow allows users to search across the entire platform for relevant records, documents, or information. It is one of the most powerful tools for quickly locating data, helping users avoid navigating through menus or modules.

#### Key Features:

Search Scope: Global search allows users to search through all data and records that they have access to, across multiple applications (e.g., incidents, changes, requests, knowledge articles).

Search Filters: Users can narrow down search results by filtering based on the type of record or specific categories. For example, you can choose to search within incidents, change requests, or knowledge articles.

Search Suggestions: As you type, ServiceNow will suggest relevant records or common search terms, helping speed up the search process.

Quick Actions: The global search also enables users to take quick actions directly from the search results (e.g., view or edit a record without navigating to the full module).

#### Search Types:

Record Search: Searches for specific records, such as incident tickets, user records, or task lists.

Knowledge Base Search: Allows users to search for knowledge articles or FAQs.

Application Search: Quickly finds specific applications or modules within the platform.

Navigational Search: Helps users find specific navigation paths, such as settings or configuration options within the ServiceNow interface.

### 2. Navigation Elements

#### Overview:

The navigation system in ServiceNow is designed to streamline access to different modules, applications, and functionalities within the platform. Understanding how to efficiently navigate is crucial for users who need to interact with various parts of the system regularly.

#### Key Navigation Elements:

Application Navigator:

* + Purpose**:** The Application Navigator is located on the left-hand side of the interface and serves as the main way to access applications and modules within ServiceNow. It organizes all the applications installed on the platform into categories and subcategories.
  + Search Box: At the top of the navigator, there's a search box where users can type the name of an application, module, or table. This allows users to quickly find what they are looking for without manually scrolling through the entire list.
  + Navigation Structure: It typically includes categories such as "Self-Service," "Incident," "Change," "Service Catalog," and more. Each category expands to show the specific modules within it.

Navigation Bar:

* + Location: Found at the top of the page, the navigation bar contains quick links for notifications, settings, user profiles, and system preferences.
  + Global Search Box: The global search box is part of the navigation bar, allowing users to initiate searches from any page.

**Favorites:**

* + **Purpose:** The favorites functionality allows users to "bookmark" frequently used applications, reports, forms, or records for easy access.
  + **How it Works:** Users can click the star icon next to any module or page to add it to their favorites. The favorites list will then appear at the top of the Application Navigator, providing a customized navigation experience.
  + **Benefits:** Reduces time spent searching for frequently used items and improves efficiency for users who regularly access certain areas of the platform.

**History:**

* + **Purpose:** The history feature tracks all the pages and records that a user has recently accessed. It provides a quick way to revisit previous records or pages.
  + **How it Works:** Clicking on the history button in the navigation bar shows a dropdown of recently visited items. This list is automatically populated based on user activity.
  + **Benefits:** History is especially useful for retracing steps or returning to specific records without having to search or navigate back through menus.

**Connect Chat:**

* + **Purpose:** ServiceNow's chat feature allows users to communicate in real-time with other users within the platform. It facilitates collaboration on tasks, incidents, and requests.
  + **How it Works:** Users can initiate chats directly from within records or task views. For example, while working on an incident, you can start a chat with other team members to discuss resolution strategies.
  + **Features:** Chat history, file sharing, and linking records directly to the chat window make it easy to collaborate and document conversations.

**Contextual Help:**

* + **Purpose:** This feature provides guidance and help to users as they navigate the platform. It’s particularly useful for new users or those unfamiliar with certain modules or applications.
  + **How it Works:** Contextual help can be accessed through the question mark (?) icon in the navigation bar. The help provided is relevant to the specific page or record the user is currently viewing, offering step-by-step instructions or FAQs.
  + **Benefits:** Improves user autonomy and reduces reliance on external support or documentation by providing quick access to relevant help information.

* **Video 4-**

**ServiceNow Branding Overview**

ServiceNow branding allows organizations to customize the look and feel of their ServiceNow instance to align with their corporate identity. Branding is an essential part of creating a cohesive user experience that reflects the company’s style, improves user engagement, and ensures consistency across digital workflows. This customization can range from simple logo changes to advanced UI adjustments using the UI Builder.

### **1. Branding Setup**

Branding setup refers to the process of applying an organization's visual identity (logos, colors, fonts, etc.) across the ServiceNow interface, primarily through the ServiceNow Portal and the platform as a whole. Branding can be customized for both internal and external users, ensuring that the interface reflects the company's design standards.

#### **Key Branding Elements:**

* **Logos:**
  + Companies can upload their logos to be displayed on the header, login pages, and other prominent areas of the interface.
  + Logos help reinforce the company's branding and create a familiar experience for users.
* **Color Schemes:**
  + Header and Footer Colors: Customize the colors of the header, footer, and navigation bars to align with the company's branding colors.
  + Button and Link Colors: Control the colors of buttons, links, and other interactive elements within the portal or platform.
  + These customizations ensure that users experience a consistent design that reflects the corporate color scheme**.**
* **Fonts and Text Styles:**
  + Font customization is also available in ServiceNow. Organizations can use custom fonts that match their corporate identity.
  + Text styles such as headers, body text, and button text can be configured to match branding guidelines.
* **Favicon:**
  + The favicon, which appears in browser tabs, can be customized to include the company’s logo or icon, ensuring consistent branding even at the tab level.

### **2. ServiceNow Portal Customization**

The ServiceNow Portal is an interface that organizations can customize to deliver services to users in a user-friendly manner. Portal customization allows businesses to extend their branding into the customer or employee-facing portals. These portals are often used for self-service, knowledge management, and other front-end functions.

#### **Key Areas for Portal Customization:**

* **Themes and Layouts:**
  + ServiceNow provides several out-of-the-box themes that can be used as a starting point. These themes include pre-configured colors, fonts, and layouts.
  + Custom layouts allow organizations to define how information is displayed. For example, organizations can control the structure of pages, forms, and lists that users interact with.
* **Header and Footer Customization:**
  + Customize the header to include navigation links, search bars, and logos.
  + The footer can be configured to include contact information, copyright details, and additional navigation links.
* **Widgets:**
  + Widgets are modular components that can be added to portal pages to deliver functionality like search, forms, knowledge articles, or service catalog items.
  + Widgets can be customized to display information according to business needs and in a branded style.
* **Service Catalog Pages:**
  + The service catalog, which allows users to request services and items, can be customized with company branding to provide a seamless experience for employees or customers.
  + Items and services in the catalog can also be grouped and categorized to reflect company-specific services and workflows.
* **Responsive Design:**
  + The portal is fully responsive, meaning it adapts to different screen sizes, such as desktops, tablets, and mobile devices. Customization should ensure that the portal's branding remains consistent across all devices.

### **3. UI Builder Functionalities**

The UI Builder is a powerful tool in ServiceNow that allows administrators to create and customize user experiences, especially in the context of portals and workspaces. With UI Builder, users can create dynamic, responsive, and branded interfaces without needing to write complex code.

#### **Key Features of UI Builder:**

* **Visual Drag-and-Drop Editor:**
  + UI Builder provides a drag-and-drop interface that allows users to design pages by placing components (like headers, footers, widgets) on a canvas.
  + It supports real-time previews, making it easy to see how changes affect the page layout.
* **Reusable Components:**
  + The UI Builder offers pre-built components, such as buttons, text boxes, tables, charts, and forms. These components can be customized and reused across different pages or applications.
  + Each component can be styled using CSS and configured with specific actions or behaviors to meet the business’s needs.
* **Data Binding:**
  + Components in UI Builder can be dynamically linked to data from the ServiceNow platform. For example, a table component can be bound to a data source such as a list of incidents, and it will automatically display the most up-to-date information.
  + Data binding ensures that the UI is interactive and responsive to changes in the platform's data.
* **Custom Scripting and Logic:**
  + While UI Builder is designed for no-code/low-code development, it also allows for the integration of custom logic and scripts. Administrators can write client-side or server-side scripts to add advanced functionality or integrate external data sources.
* **Responsive Design:**
  + UI Builder allows administrators to create interfaces that are responsive by default, meaning that they automatically adjust to different screen sizes and devices.
  + This is essential for creating portals and workspaces that work well on mobile devices and desktops.
* **Conditional Display Logic:**
  + Components can be configured to appear or behave differently based on certain conditions, such as the user’s role, status of a task, or input from other components.
  + For example, a specific form field can be hidden or displayed depending on user selections.
* **Video 5-**

**ServiceNow Lists and Filters Overview**

In ServiceNow, lists are a fundamental part of the platform's user interface, allowing users to view and manage records in a tabular format. Lists are used across applications to display data from tables, such as incidents, requests, users, and tasks. Filters are essential tools that enable users to narrow down records to display only relevant data, improving efficiency and helping users focus on specific tasks.

This section provides an in-depth understanding of list control features, filter conditions, and list customization in ServiceNow.

### **1. List Control Features**

#### **Overview:**

The list view in ServiceNow presents records in rows and columns, where each row represents a record, and each column represents a field from the corresponding table. Users can interact with lists in various ways, including sorting, filtering, grouping, and personalizing the data displayed.

#### **Key List Control Features:**

* **Column Headers:**
  + Each column in a list represents a specific field from the table. The column headers allow users to interact with the list by sorting the data, changing the displayed fields, and grouping records.
  + Sorting: Clicking on a column header sorts the list by that field, either in ascending or descending order. For example, sorting the "Priority" column will organize records by priority level.
* **Grouping Records:**
  + Users can group records based on the values in a specific column. This feature is useful for organizing data visually. For example, incidents can be grouped by "State" (New, In Progress, Closed).
  + How to Group Records: Right-click on a column header and select "Group by [Field Name]." This will group the list based on that field.
* **Personalizing Lists:**
  + Users can personalize their list views by selecting which columns to display or hide. This helps users focus on the most relevant data for their tasks.
  + How to Personalize: Click the gear icon in the top-right corner of the list to open the "Personalize List Columns" window. From here, users can drag and drop fields into the view or remove unnecessary fields.
* **Pagination:**
  + Lists are paginated to improve performance. By default, the list will show a limited number of records per page (e.g., 20 records). Users can navigate through pages using the pagination controls at the bottom of the list.
* **List Context Menu:**
  + Right-clicking on any row in the list brings up the context menu, which allows users to perform quick actions on records, such as View, Edit, Delete, or Assign.
  + Multi-Row Context Menu: Users can select multiple rows at once and use the context menu to perform bulk actions, such as Delete, Update, or Export.
* **Inline Editing:**
  + Inline editing allows users to update certain fields directly from the list view without opening the record. This feature is useful for making quick changes to multiple records.
  + How to Enable Inline Editing: When a list is editable, users can double-click a field in the list and edit the data. Once the change is made, it is saved automatically.
* **Exporting Lists:**
  + Users can export the records in a list to various formats, such as Excel, CSV, PDF, or XML, for offline analysis or reporting.
  + How to Export: Right-click on the column header or the list context menu and choose Export. Select the desired format for export.
* **List Calculations:**
  + ServiceNow allows for real-time calculations on numeric fields in list views, such as Sum, Average, Minimum, or Maximum.
  + How to Apply List Calculations: Right-click on the column header and select Configure > List Calculation to see calculations for numeric fields.

### **2. Filter Conditions and List Customization**

#### **Overview:**

Filters are used to refine the data displayed in lists, allowing users to view only the records that meet specific criteria. Filter conditions are built using logical statements to include or exclude records based on their field values. Filters improve productivity by making it easier for users to find relevant information.

#### **Key Filter Features:**

* **Creating Filter Conditions:**
  + Filters are created using logical statements (conditions) that define what records should be included in the list. Each filter condition consists of:
    - Field: The field from the table (e.g., "State," "Priority," "Assigned to").
    - Operator: Defines the relationship between the field and the value (e.g., "is," "is not," "greater than," "contains").
    - Value: The specific value or criteria being searched for (e.g., "New," "High Priority").
* **Example Filter Condition:**
  + To filter incidents that are in the "New" state and have a "High" priority, a filter would be:
    - Field: State
    - Operator: is
    - Value: New
    - AND
    - Field: Priority
    - Operator: is
    - Value: High
* **How to Create a Filter:**
  + Click the Filter icon (a funnel icon) in the list view.
  + A filter pane will open, allowing users to define the conditions.
  + Add conditions by selecting the field, operator, and value.
  + Click Run to apply the filter and see the refined list of records.
* **Saving Filters:**
  + Users can save filters to quickly apply them in the future. Saved filters can be accessed from the Filter Navigator.
  + How to Save Filters: After applying a filter, click the Save button. Assign a name to the filter for easy reference.
* **Applying Multiple Filters:**
  + Users can apply multiple filter conditions by adding additional logical operators, such as AND or OR, to further refine the results.
  + AND: Records must meet all the specified conditions.
  + OR: Records that meet any of the specified conditions will be included.
* **Dynamic Filters:**
  + Dynamic filters are predefined filters that use relative conditions, such as "My Incidents" or "Incidents assigned to my group." These filters automatically adjust based on the user who is logged in, making them useful for user-specific tasks.
  + Example Dynamic Filters:
    - My Incidents: Displays only incidents assigned to the logged-in user.
    - My Group's Tasks: Shows all tasks assigned to the user’s group.
* **List Customization:**
  + Users can customize lists by adding or removing fields (columns), changing the order of columns, and modifying the display format. This allows users to tailor their list views based on their preferences and workflow needs.
* **Steps for Customizing Lists:**
  + Personalizing Columns: Click on the gear icon at the top-right corner of the list and select Personalize List Columns.
  + Add/Remove Columns: From the Personalize List Columns window, users can drag fields from the available list to the selected list to add them to the list view.
  + Reorder Columns: Drag and drop columns to reorder them.
  + Save Changes: Click Save to apply the customizations.
* **Search within Filters:**
  + Lists also have a built-in search box that allows users to perform a quick keyword search across all fields in the list. This is useful when users know a specific piece of information, such as a record ID, but don’t want to create a full filter condition.
* **How to Use Search: Simply type into the search box above the list, and the results will instantly update with matching records.**

### **3. Advanced List Control and Filter Techniques**

* **Dot-Walking:**
  + Dot-walking allows users to filter records based on fields in related tables. For example, when filtering incident records, users can apply a filter based on a field in the "Assigned to" user's profile (such as "Department" or "Location").
* **Example:**
  + Filter incidents where the assigned user belongs to the "IT" department:
    - Field: Assigned to.Department
    - Operator: is
    - Value: IT
* **Advanced Filters:**
  + Users with more advanced access can create complex filters using script-based conditions. This is often used when the built-in filter options do not cover the complexity needed.
* Example: Writing a custom query to filter records based on specific criteria not available in the default filter options.
* **Filter Sharing and Exporting:**
  + Filters can be shared with other users or exported for analysis in other tools.
  + How to Share Filters: After creating a filter, click the Share button and select the users or groups who should have access to the filter.