ServiceNow

ServiceNow Fundamentals

participant guide

ServiceNow Fundamentals

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ServiceNow Fundamentals Course Module Agenda

Module 1 – 1.1 ServiceNow Overview

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Objectives

- What is ServiceNow?
- What is the ServiceNow Instance?
- Users and Groups
- Key Platform UI Components
  - Application Navigator
  - Content Frame
  - Banner Frame
- Mobile Access
- Product Documentation

What is ServiceNow?

ServiceNow is a cloud-based platform deployed in a browser that contains applications and data that can vary by instance and user, automating common business processes

A leader in Enterprise Service Management (ESM), the ServiceNow Service Automation Platform provides a modern, easy-to-use, service management solution in the cloud allowing your organization to automate manual repetitive setup tasks, manage your core IT processes, standardize service delivery, and focus on your core business, not just ITSM infrastructure.

ServiceNow provides all of this to users from a configurable web-based user interface, built on top of a flexible table schema.

The ServiceNow platform and the applications that run on it use a single system of record and a common data model to consolidate your organization's business processes.

Another advantage to this single system is that it can be leveraged to build custom applications.

The ServiceNow platform provides a Platform as a Service (PaaS), a cloud-based computing model that provides the infrastructure needed to develop, run, and manage applications.

It is not limited to a specific department or function but encompasses the entire enterprise.

What is the ServiceNow Instance?

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An **instance** is a single implementation of the ServiceNow platform

- Independent, changeable, and highly configurable
- Not shared with other ServiceNow customers (single-tenant)
- Each instance has applications
- Each instance has customer data that can be exchanged between instances
- Upgrades are made on individual instances

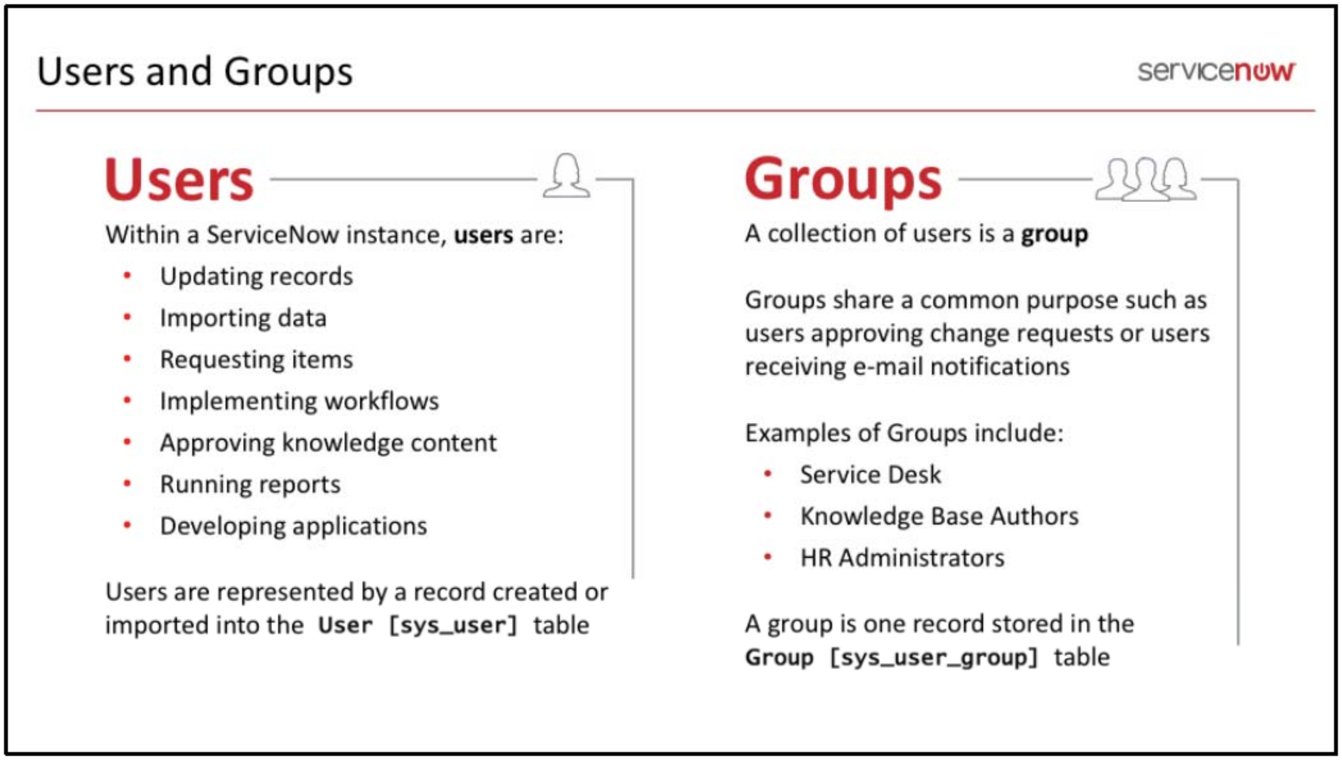
An instance is located (hosted) in one of the ServiceNow Data Centers around the world, or for a very, very small percentage of our customers, an instance can be implemented onsite at the customer's location. Each ServiceNow instance has a unique URL that uses a format similar to https://<instance name>.service-now.com/.

ServiceNow utilizes an advanced, multi-instance, single-tenant architecture as the default offering for customers, meaning an instance features an individually isolated database containing data, applications, and customizations.

The ServiceNow multi-instance architecture, organized in an instance stack, provides these distinct advantages:

- The multi-instance architecture allows ServiceNow to perform actions on individual customer instances such as performing an upgrade, on a schedule that fits the compliance requirements and needs of your enterprise.
- Data is truly isolated in their own databases, making hardware and software maintenance on these unique customer instances far easier to perform and issues can be resolved on a customer-by-customer basis.

Each customer organization receives two instances of ServiceNow: production and sub-production. They have the ability to obtain additional sub-production instances to be used for User Acceptance Testing (UAT), Review, Development, or Quality Assurance (QA).



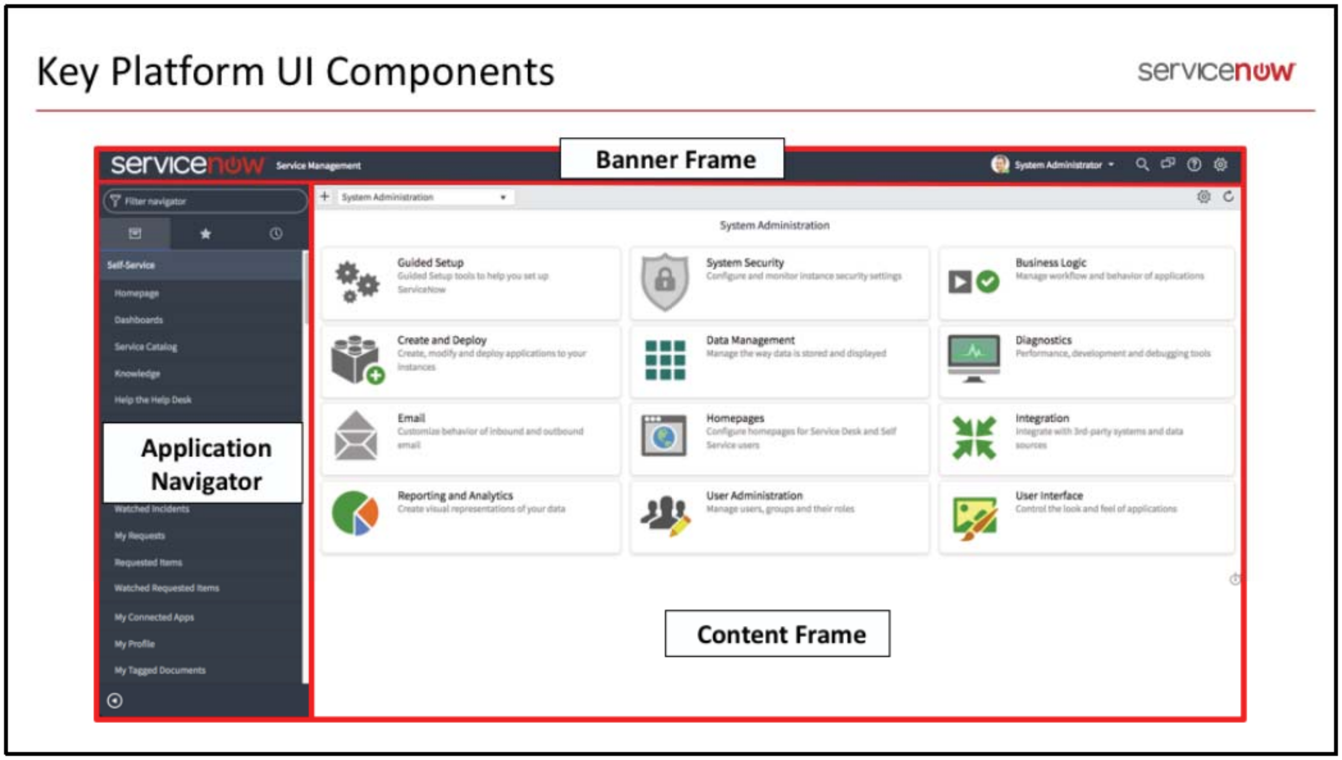
Manage the individuals who can access ServiceNow by defining them as users in the platform.
NOTE: User names (represented by user IDs) are unique in ServiceNow.

Users are authenticated by various methods, including:

- **Local database**: The user name and password in their user record in the instance database
- **Multifactor**: The user name and password in the database and a passcode sent to the user's mobile device that has Google Authenticator installed
- **LDAP**: The user name and password are accessed via LDAP in the corporate directory, which has a matching user account in the ServiceNow database
- **SAML 2.0**: The user name and password configured in a SAML identity provider account, which has a matching user account in the database
- **OAuth 2.0**: The user name and password of OAuth identity provider, which has a matching user account in the database
- **Digest Token**: An encrypted digest of the user name and password in the user record

User credentials are matched to different saved credentials for each method. Multiple Provider SSO allows the selection/use of several identity providers (IdPs) to manage authentication as well as retain local database authentication.

A group is part of the user hierarchy, and a user is part of a group. Groups may be imported from a corporate directory (LDAP) or created manually in ServiceNow.

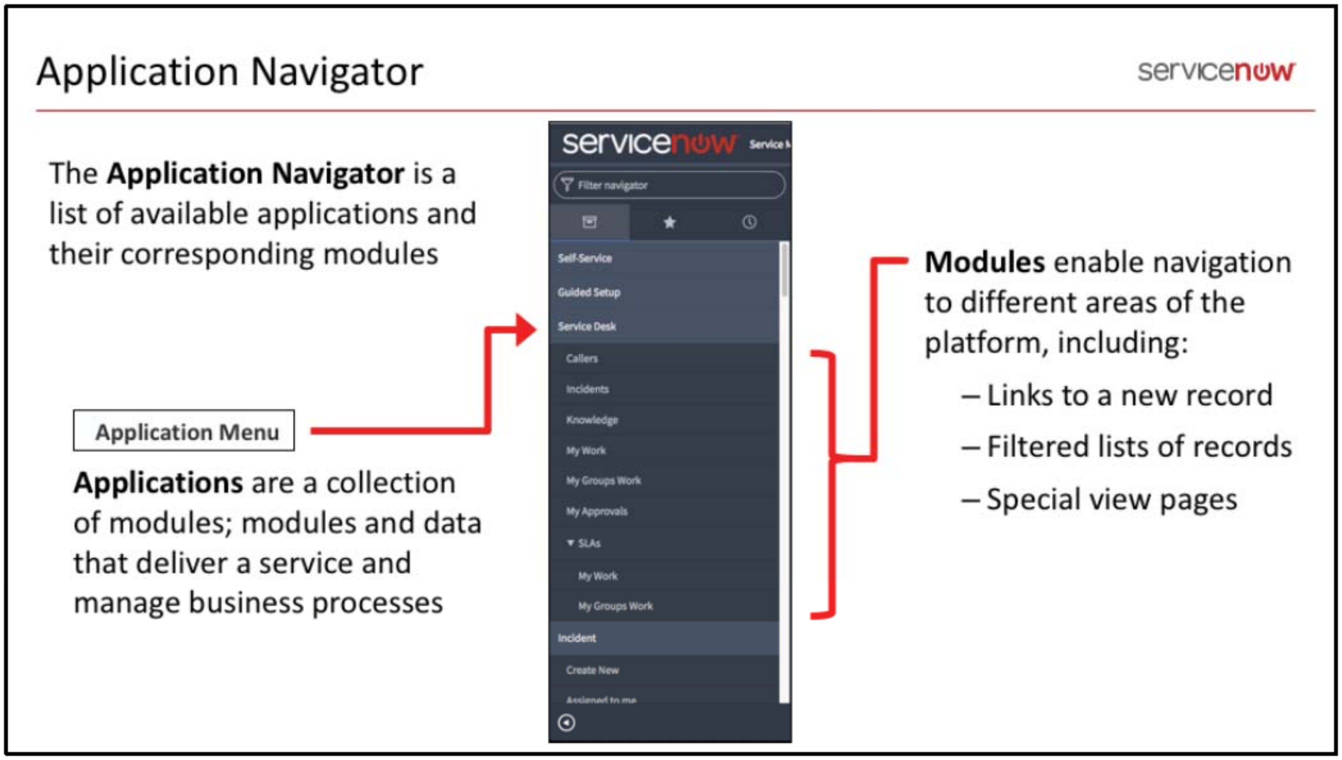


The User Interface (UI) is the main way for users to interact with the applications and information in a ServiceNow instance. Notable ServiceNow features include real-time form updates, user presence, an application navigator designed with tabs for favorites and history, and enhanced activity streams all of which you will explore in this training. This is an example of the System Administration homepage.

The ServiceNow user interface is divided into three areas:

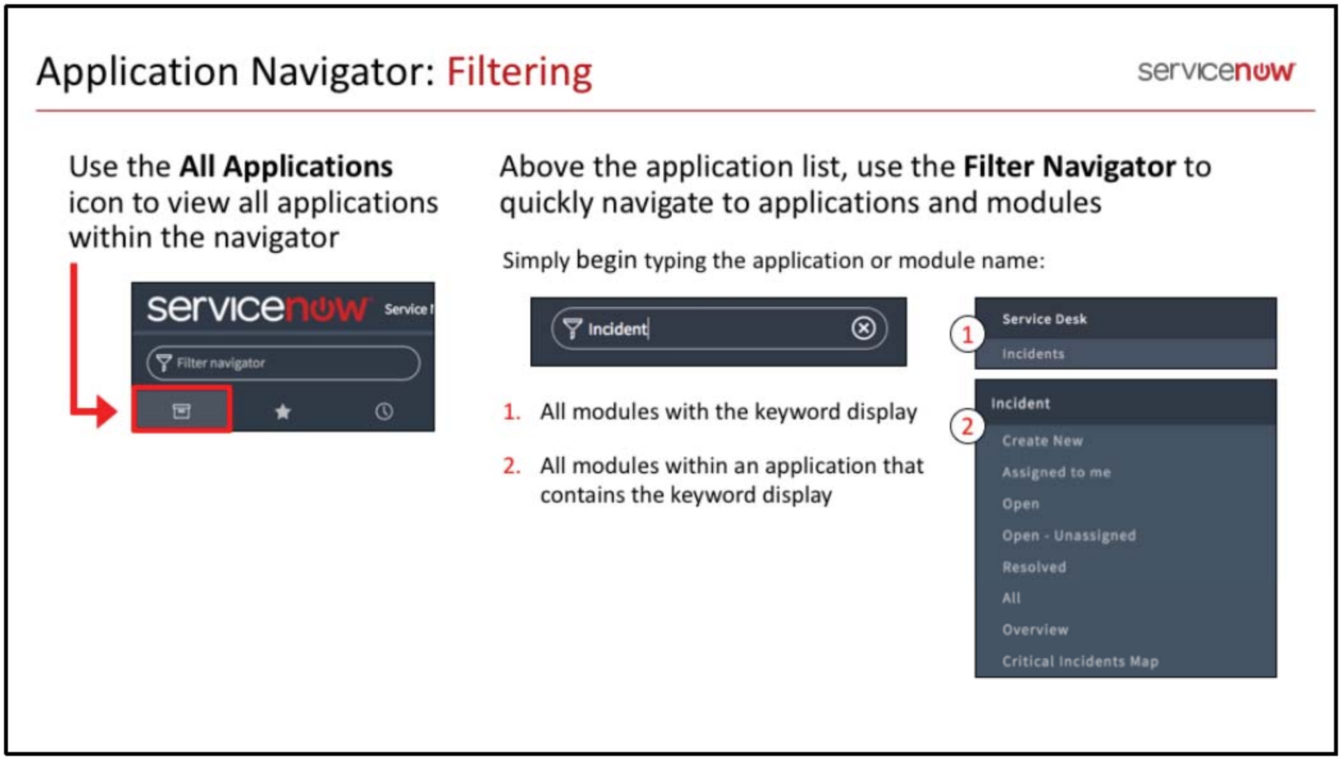
1. **Banner Frame**: The Banner Frame highlights important tools and settings that apply to your instance.
2. **Application Navigator**: The components of the Application Navigator, the panel on the left side, are based upon your assigned role(s). The navigator may be expanded (as shown above) or collapsed. The navigator provides links to all application menus and modules, based on your permissions.
3. **Content Frame**: The Content Frame displays information, such as lists, forms, dashboards, knowledge bases, and service catalogs depending on where you navigate within the platform. This also impacts how the information is visually represented.

NOTE: The position of these components on your screen may vary depending on your region.



Applications are a group of modules, or pages, that provide related information and functionality in an instance. Modules can contain links to a new record, lists of records with varying filters applied, and special visual tools.

For example, the Incident application contains modules for creating and viewing incidents. The Configuration application contains modules for changing and accessing servers, databases, and networks.



The Application Navigator provides access to all applications and the modules they contain, enabling users to quickly find information and services.

To view all applications within the navigator, ensure that the **All Applications** icon is selected at the top left of the navigator.

TIP: Double-click the **All Applications** icon to expand and/or collapse all applications. Click any application to expand or collapse all of its modules.

To quickly search throughout the application navigator to view a particular application or module, use the **Filter Navigator.** The Filter Navigator is located at the top of the Application Navigator.

As soon as a user begins typing, the Application Navigator displays only applications and/or modules matching the keyword. For example, if the keyword “Incident” is typed into the Filter Navigator, the Incident application and a list of *all* its modules will display, as well as any modules containing the word “Incident” within other applications, such as **Service Desk > Incidents.**

Application Navigator: Favorites and Your History

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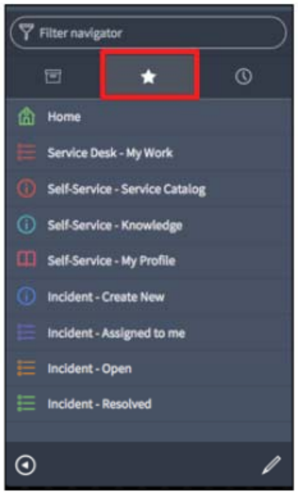
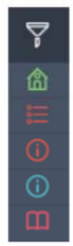
Favorites



Items added as favorites appear in the **Favorites** tab of the Application Navigator, which is represented by a star icon

Favorites display as icons in a collapsed view

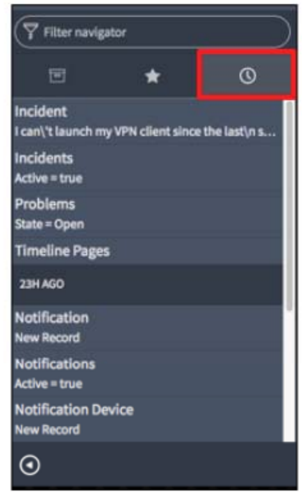


Your History

Your History provides a scrolling view of recent activities including:

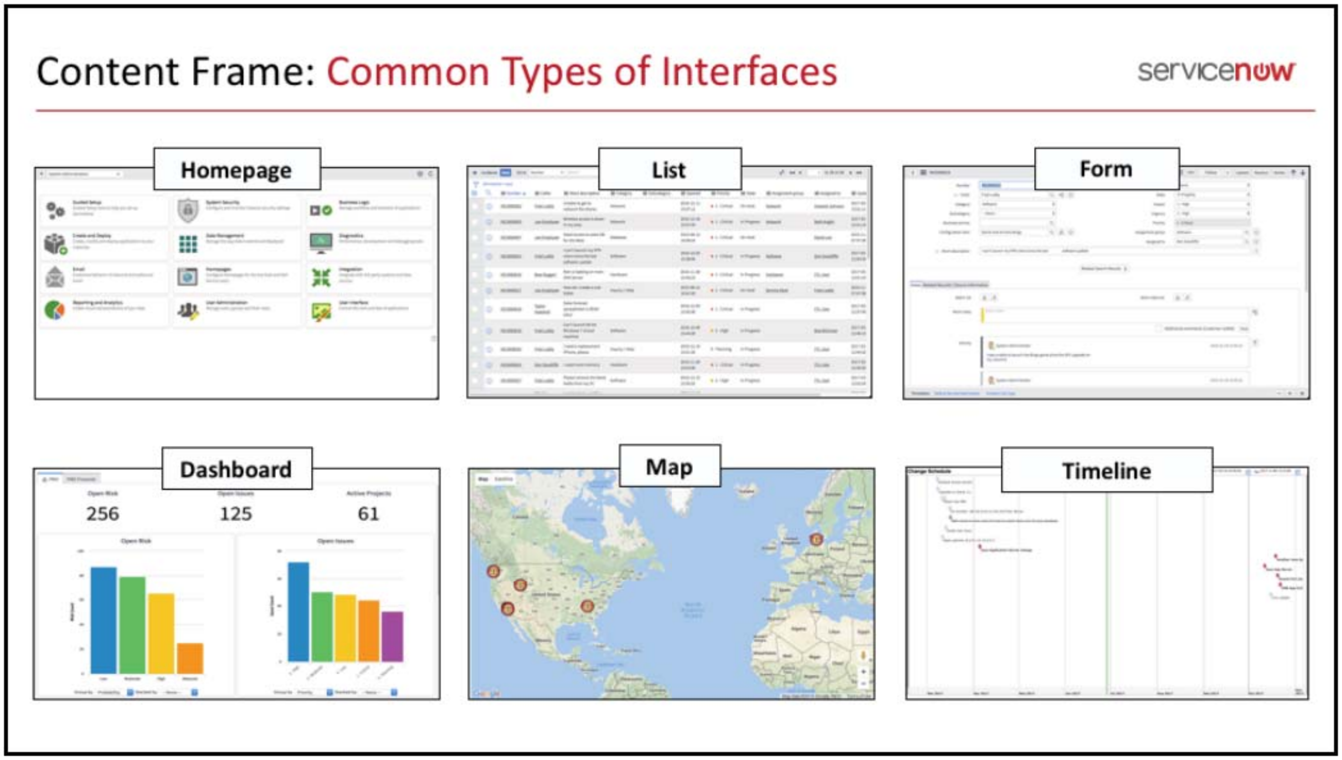
- Forms and lists you accessed
- Homepages you visited

Simply click on any recent activity to open the item in the Content Frame



Favorites: Access the favorites menu to see all your favorites in one place. Favorites include application menus and modules which you may wish to access quickly and often. Favorites will also display in the Application Navigator even when a filter is applied, so long as the Favorite matches the search term.

Your History: The Application Navigator contains a scrolling list of your recent history within ServiceNow. For example, **Your History** will display forms you were filling out or lists you were searching on. Simply click on an item to open any recent activity in your content frame. Some content types are not tracked, including UI pages and other non-standard interfaces.



Homepage: A homepage consists of navigational elements, functional controls, and platform information. When a user logs in to an instance, the default homepage defined for their role appears unless the user switched to another homepage or has set a dashboard to appear.

All users with a role can use the **Add content** link on the homepage to customize the homepage and display important changes and emergency information to other users.

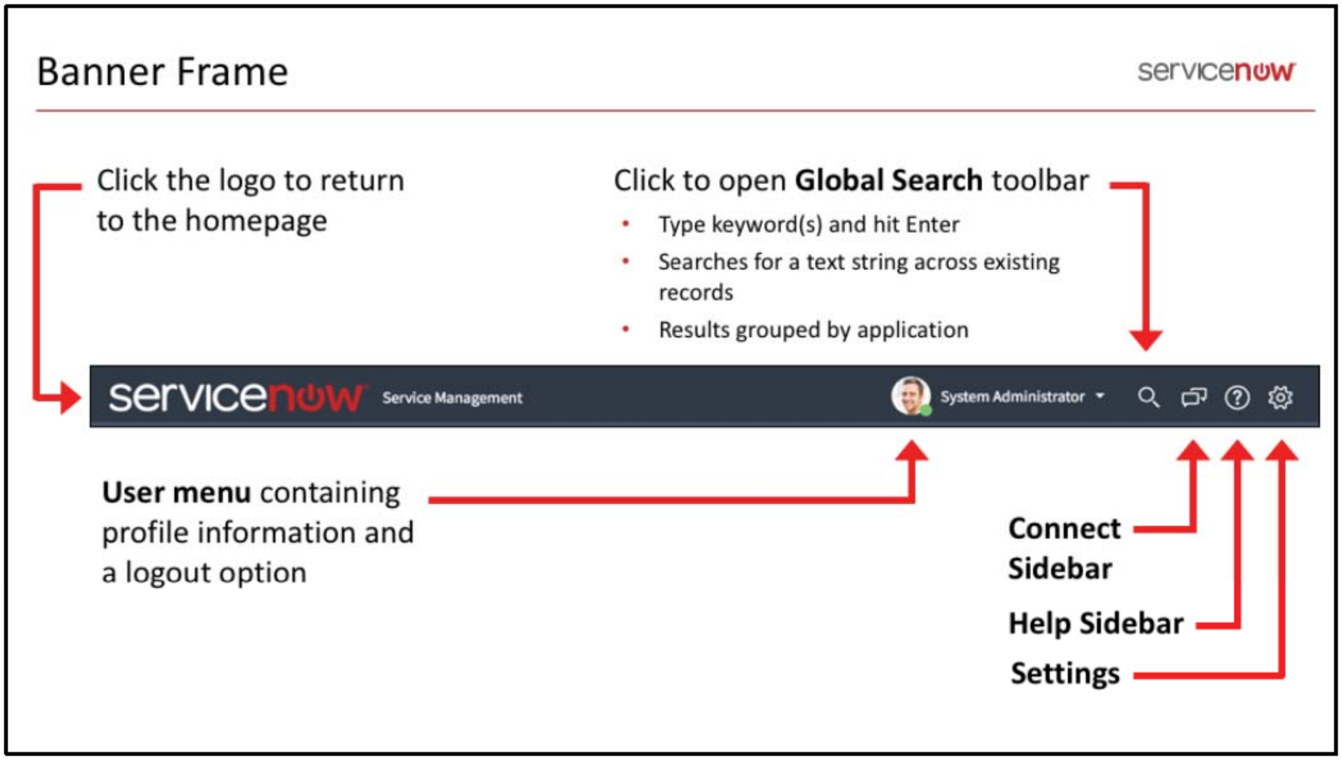
List: View data records as a list. Lists display records from a data table, as well as allow users to edit the record information using the List Editor functionality.

Form: View individual data records as a form. Data is typically entered into ServiceNow through forms.

Dashboard: Dashboards enable the display of multiple performance analytics, reporting, and other widgets on a single screen.

Map: Display ServiceNow data graphically on a Google map. Drill-down into a map to view specific data points.

Timeline: Used to track tasks or projects.



The Banner Frame runs across the top of every page and contains global navigation controls and several key functionalities and features:

- Your logo in the top-left hand corner, which also navigates you back to your homepage when you click on it
- Information about the logged-in user: click the down arrow to the right of the user name to view the user profile or log out
- Click the magnifying glass to expand the Global Search toolbar and use this to search across all data in ServiceNow, such as a keyword, record number, and more
- Toggle on and off the Connect Sidebar, which is used to communicate with other users in real-time
- Get help, including Product Documentation and new features
- Personalize your settings

NOTE: With additional rights, a user may see Impersonate User and Elevate Roles as additional options from the user menu. These are features useful for testing and visibility.

Mobile Access

In addition to accessing a ServiceNow instance from a laptop or desktop computer, ServiceNow supports the following technologies:

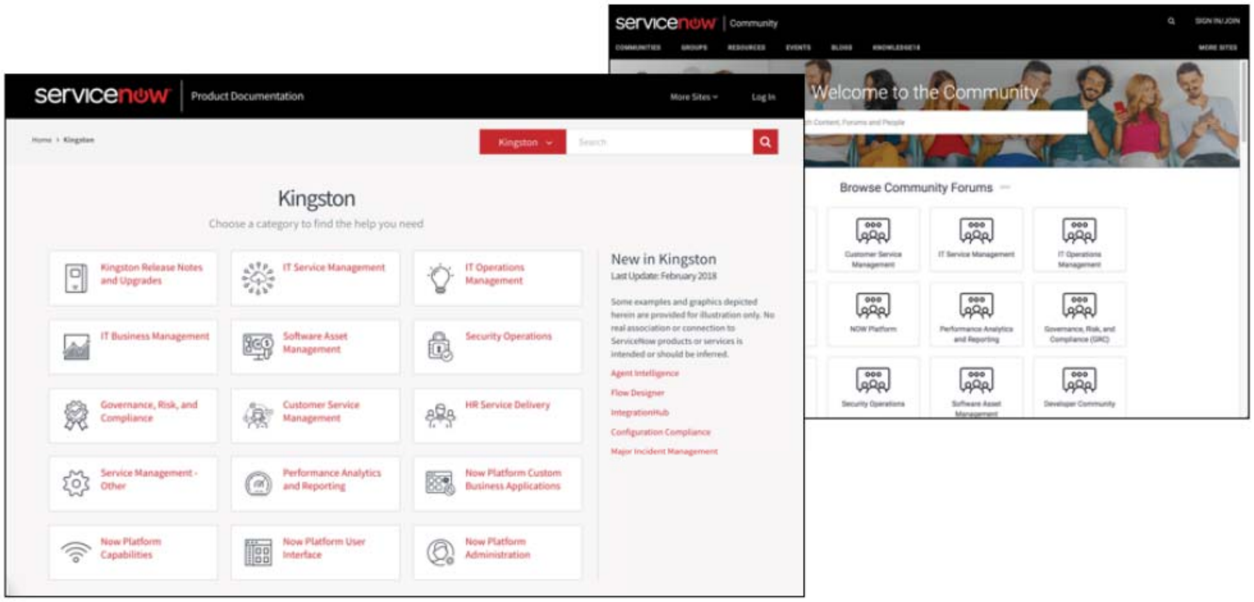
Smartphone: The smartphone interface supports many of the features found in the standard desktop/laptop browser interface, including lists, forms, favorite/shortcut management, and filtering. There are no special configurations needed for the iPhone or Android phones; the smartphone interface uses familiar, industry-standard techniques for performing most actions.

Tablet: The ServiceNow instance automatically detects the tablet and redirects to the desktop interface.

Apple Watch: Features include: notifications, favorites, record monitoring, chat messaging, dashboard charts, and record interaction via canned responses and voice to text (Siri).

Depending on how ServiceNow is accessed, the user interface and features may vary.

Product Documentation: Docs and Community

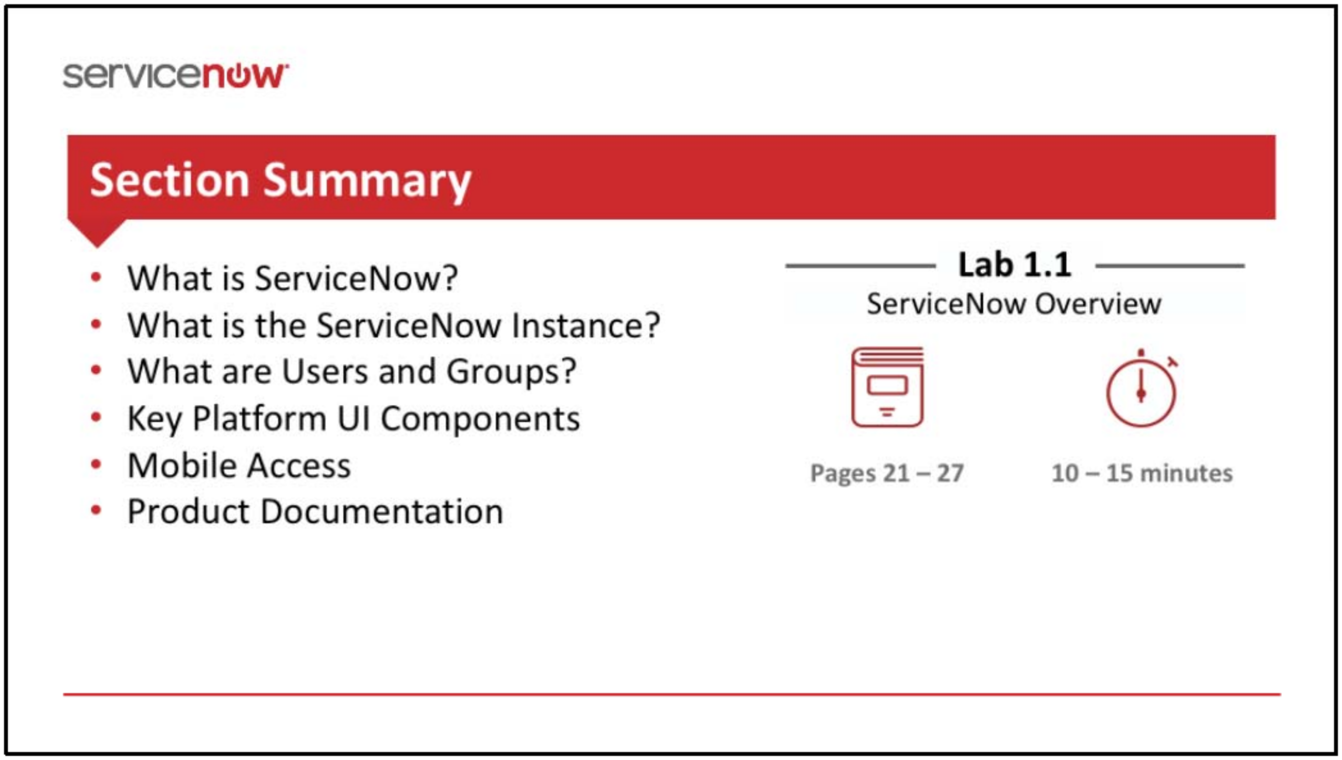


If anything in this class seems interesting, we highly encourage you to explore the topic in more detail through either of the following websites:

docs.servicenow.com is the official documentation resource for ServiceNow, with content produced by ServiceNow. From features to functionality, and even release notes, this resource should have all of the information needed to get the most out of the platform.

community.servicenow.com is similar to the Docs website, in that it provides useful information about the ServiceNow platform. However, where Community really excels is by bringing together actual ServiceNow users to collaborate, share, and produce ideas, content, and even answers to questions you may have!

This is a great resource to learn from users with real-life experience on the platform!



Lab 1.1 – ServiceNow Overview:

- Log on to your training instance
- Use the Application Navigator and its filter to access different areas of ServiceNow
- Add Knowledge and Service Catalog modules to Favorites

LAB

1.1

ServiceNow Overview

10 – 15 minutes

Lab Goal

This lab will show you how to do the following:

- Log on to your training instance
- Use the Application Navigator and its filter to access different areas of ServiceNow
- Add Knowledge and Service Catalog modules to Favorites

This course builds on a scenario where you work for a division of a fictitious electronics company called Cloud Dimensions.

Upon the reveal of their Infinity product; a portable holographic projector, you support a team of department Subject Matter Experts (SMEs) with the implementation of ServiceNow.

ServiceNow will initially be used by Cloud Dimensions for tracking Infinity inventory, order fulfillment, and customer support.

You will be required to impersonate various user personas – representing Cloud Dimension employees – throughout this course's labs.

To start, you will assume the system administrator identity to accomplish a series of tasks.

NOTE: *Screen shots are often cropped so what you see in the participant guide may not match exactly what you see in your instance.*

A. Log on to Your Training Instance

1. Navigate to **your assigned ServiceNow Lab Instance** in the web browser of your choice.

NOTE: *Your instructor provides you with your own instance URL.*

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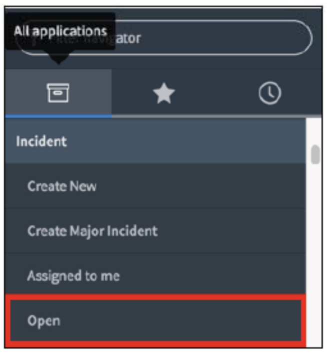
2. Log on using the **System Administrator (admin) credentials** provided by your instructor.

B. Use the Filter Navigator

1. Set the Application Navigator view to display all applications in an expanded view (double-click the **All applications** navigator icon to expand/collapse all), then locate the **Incident** application to view the 9 incident modules.

2. **Incident > Open**.

***NOTE:** The **Application Menu > Module Name** formatting indicates the navigation path to use in the expanded Application Navigator. This shorthand will be used in the lab instructions going forward. For this step, select the Incident **Open** module:*

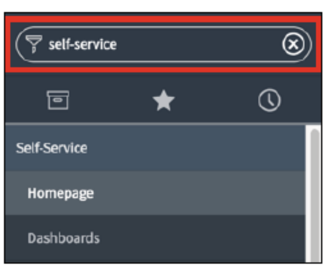


Notice how the user interface changed in the Content Frame from the System Administrator homepage to a list of open incident records.

3. **Incident > Create New**.

   Notice how the user interface has changed in the Content Frame from a list of incident records to an individual incident record/form.

4. From the Application Navigator, use the **Filter navigator** to filter the list of application menus and modules by typing **self-service** into the Filter navigator:



***NOTE:** A single application menu, **Self-Service**, appears with many modules. Scroll down to see all of the modules under the Self-Service application.*

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5. **Self-Service > Service Catalog**.

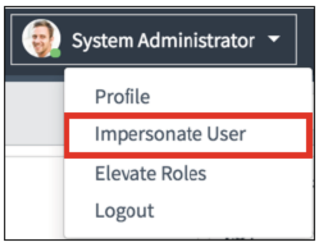
   Notice yet another user interface type displayed in the Content Frame.

6. From the Application Navigator, type the keyword **service** into the **Filter navigator**.

NOTE: *Scroll to see all of the applications and modules that contain the text "service" display.*

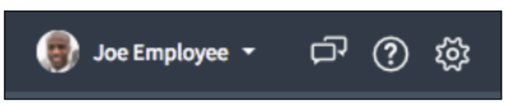
C. Set Module Favorites

1. Open the User menu on the Banner Frame, then select **Impersonate User**:



2. Impersonate the Cloud Dimensions employee **Joe Employee** by typing their name into the **Search for user** field.

NOTE: *After selecting their name from the drop-down list, ServiceNow should reload and you are now impersonating Joe Employee:*



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3. Filter the Application Navigator using the keyword **self**.

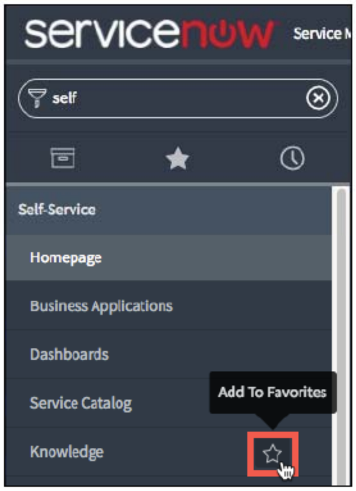
4. **Self-Service > Knowledge**.

5. Open the **ServiceNow Fundamentals Class** Knowledge Base**:**

6. Download the necessary lab files for class by selecting the **Class Lab Files** article.

NOTE: ***Selecting the Class Lab Files article will download a zip file to your local machine titled ServiceNow Fundamentals Class Files****. At your convenience, upzip the file.*

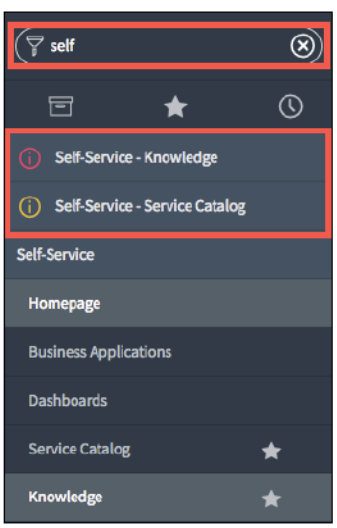
7. Next, hover over the **Knowledge** module, then add the Knowledge module as a favorite by selecting the **Add to Favorites** icon (star) to the right of Knowledge:



NOTE: *Upon selection, the module star will appear filled in.*

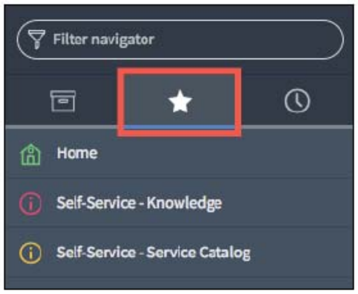
8. Repeat this step for the **Service Catalog** module.

NOTE: *In addition to application menus and modules, the* ***Filter navigator*** *will also display favorites based on keywords:*



9. Clear the Filter navigator keyword by selecting the **X** to the right of the Filter navigator.

10. Next, navigate to the **Favorites** tab of the Application Navigator to see the module favorites you have created:



11. On the bottom-right of the Application Navigator, select the **Edit Favorites** icon (pencil):

***NOTE:** The **Set up your favorites** screen displays in the Content Frame. A favorite can be customized to have any name, color, and icon.*

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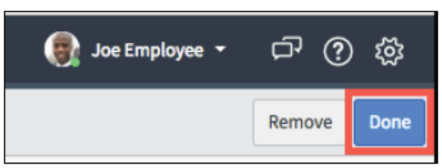
12. Select the **Self-Service - Knowledge** favorite in the Application Navigator.

13. Select any color and icon for the **Self-Service - Knowledge** favorite.

14. Repeat steps 12 and 13 for the **Self-Service > Service Catalog** favorite.

15. Click the **Done** button:



16. Minimize (collapse) the Application Navigator by selecting the **Minimize Navigator** icon (circled arrow) at the bottom of the Navigator:

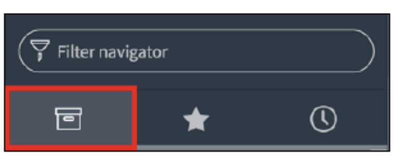
17. From the minimized Application Navigator, notice that the two favorites appear in the color and icon you have selected:

NOTE: *Your color and icon choices may vary from what is shown here for demonstration purposes.*

18. Navigate to the homepage by selecting the **Home** favorite displayed on the minimized Navigator:

19. Select **Maximize Navigator** at the bottom of the minimized Navigator:

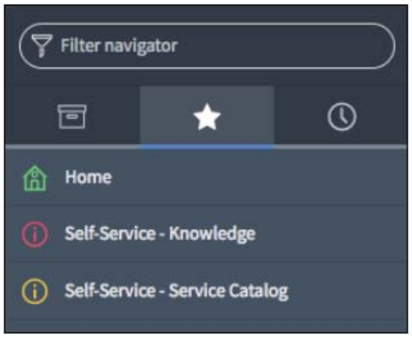
20. Next, select **All applications**:



LAB VERIFICATION

The Lab Verification displays screen shots of what you should have created during this lab. Sometimes the Lab Verifications have already been shown in earlier steps – as is the case below.

Self-Service Favorites



Congratulations on completing our first lab, ServiceNow Overview!

Module 1 – 1.2 Lists

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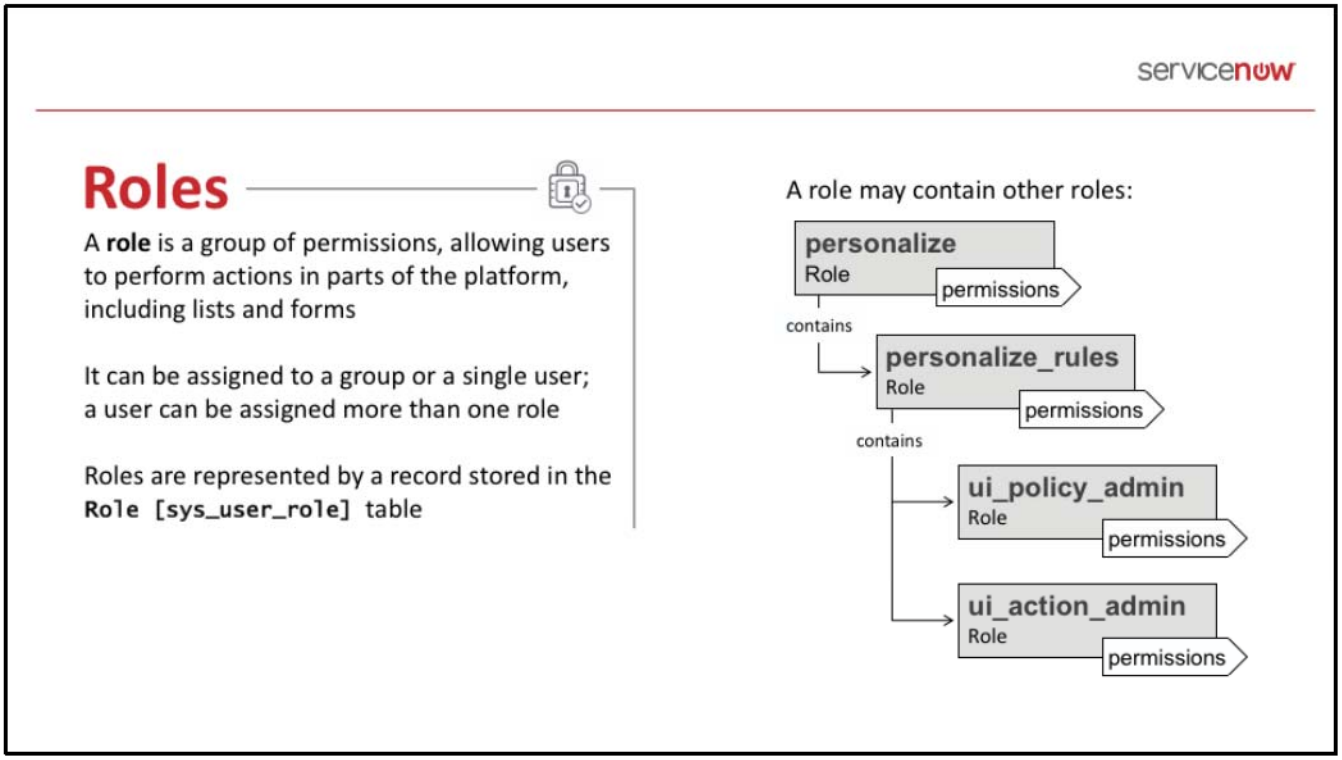
Objectives

- What is a Role?
- What is a List?
  - Anatomy
  - Views
  - Context Menus
- Layout Configuration
- List Personalization
- List Editing
- Tags
- Filters
- Finding Information: ServiceNow Search



A role is a collection of permissions used to:

- **Grant access** to applications and other parts of the platform
- **Assign security** rights

Once access has been granted to a role, all of the groups or users assigned to that role are granted the same access.

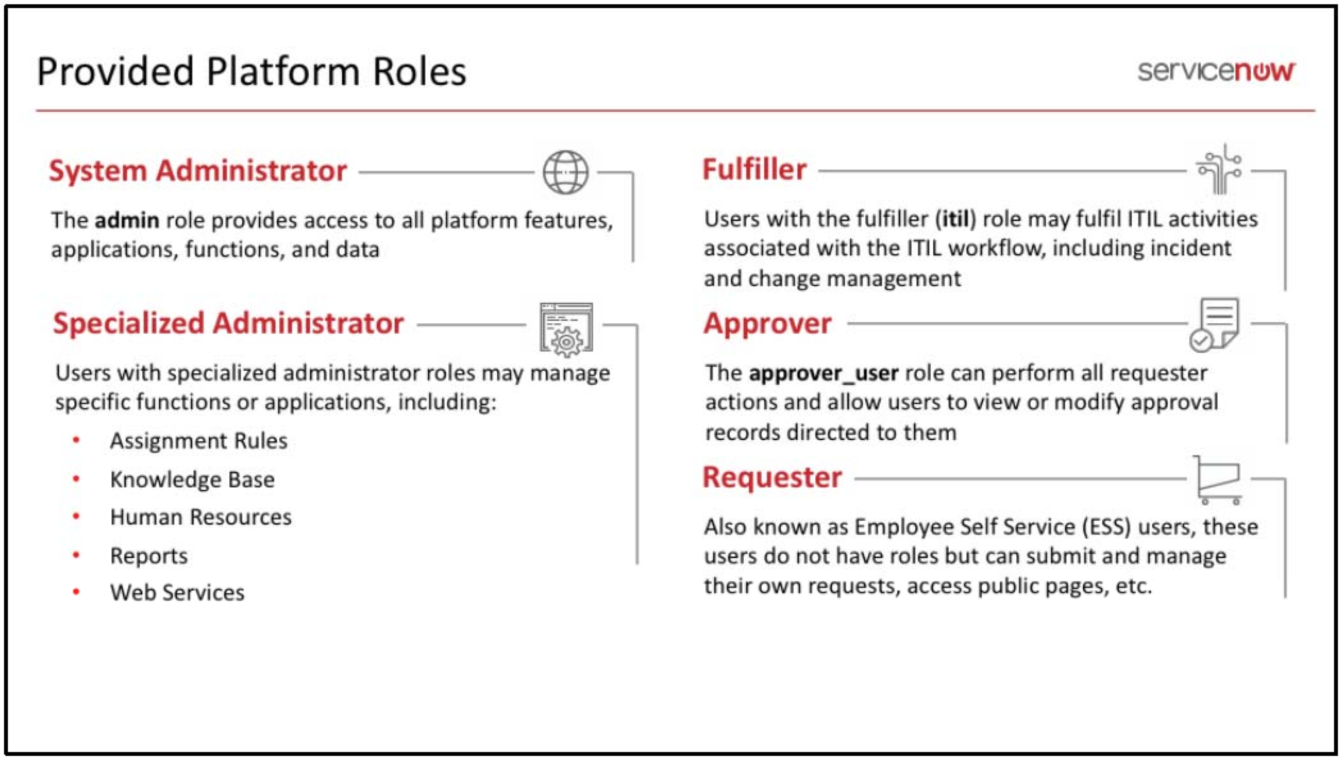
Additionally, a role may contain other roles and any access that is granted to one role is automatically granted to any role that contains it.

In this example, the **personalize** role is able to personalize forms, lists, rules, controls, and scripts. It has its own permissions and also contains the **personalize_rules** role.

The **personalize_rules** role has its permissions and contains both the **ui_policy_admin** and **ui_action_admin** roles.

The **ui_policy_admin** role can manage UI Policies. The **ui_action_admin** role can manage UI Actions.

Taken with all of these relationships, the **personalize** role contains all of the roles below it in the hierarchy. However the **ui_policy_admin** and **ui_action_admin** roles do not contain the permissions of the roles above them in the illustration.



The System Administrator (**admin**) role has almost all roles and access to all platform features, functions, and data, with some exceptions such as HR and Security Operations constraints. **Grant this privilege carefully**.

Users holding the **admin** role can create and modify user roles, as well as impersonate other users. However, not even users with the admin role can impersonate a **security_admin** role user and elevate privileges while impersonating to access higher security functionality.

The **impersonator** role can be assigned to a user to allow impersonation of other users, excluding admins, for testing and visibility purposes.

Specialized Administrator roles have broad access but generally manage specific functions or applications.

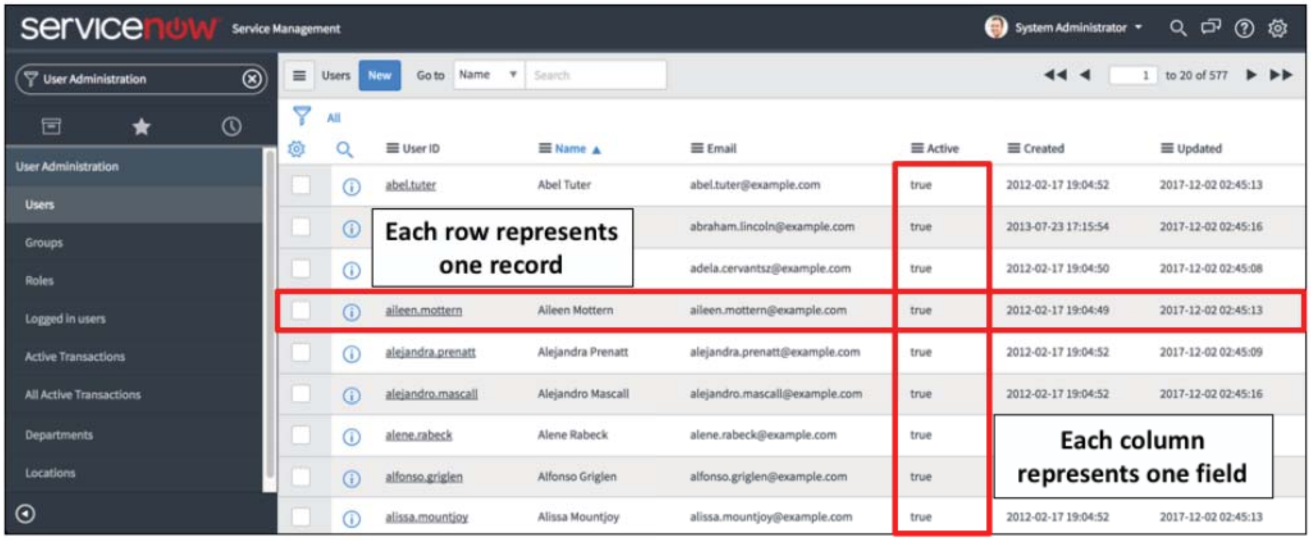
Fulfiller/Process users have clearly defined paths and workflows in the platform and have one or more roles, including the **itil** and **approver_user** roles. They can access all functionality based on assigned roles.

Approvers have the **approver_user** role, but no other roles.

Requesters use the Service Catalog and Self Service applications. They can make requests only on their own behalf, and are not assigned roles.

What is a List?

A **list** displays a set of records from a table within the content frame of ServiceNow



Lists and forms are the most common ways to interact with data. A list displays a set of records from a table. Lists can be filtered and customized to display the information you need.

NOTE: Two different versions of list functionality may be encountered; referred to as List v2 and List v3. List v3 is enabled by a ServiceNow plugin and offers additional functionality such as displaying information in a split format.

In this example, the system administrator is accessing the **User Administration** application and a list of users through the **Users** module. Other roles, such as **user_admin**, grant users the permissions to manage users, groups, and roles.

List: Anatomy

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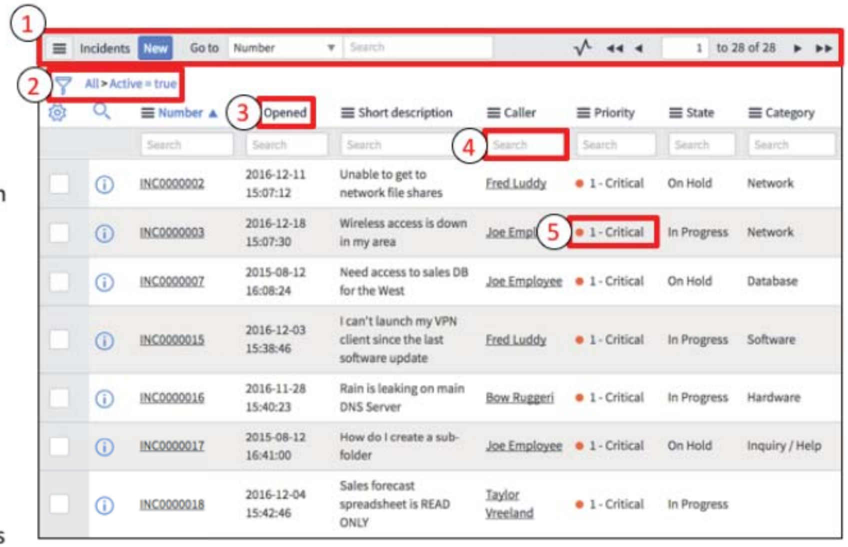
1. **Title Bar**
   Displays the list title and, in some cases, the view name, as well as search list values, and a record count
2. **List Filters/Breadcrumbs**
   Offers a quick form of filter navigation
3. **Column Headings**
   Displays column (table field) names and provides some list controls
4. **Column Header Search**
   Provides a search within a specific column
5. **Field Values**
   Data; right-click a field value to access additional actions



Although lists display data captured in different tables, their interface remains consistent with common features.

List: Views

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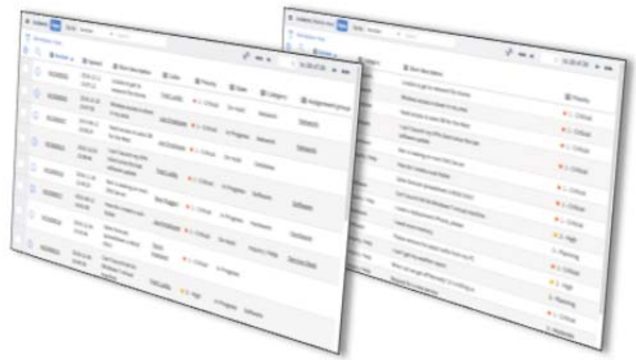
Views

A **view** is a version of a customized list or form which defines the layout order and what fields appear

For list views, the same number of records for that particular table display – different fields may be visible and display in a different order



Default view Mobile view

Views: Views enable users to quickly display the same list or form in multiple ways. System administrators can create views for lists or forms. For example, different views can be created and used on Incident for an ESS user, an ITIL user, and a mobile user.

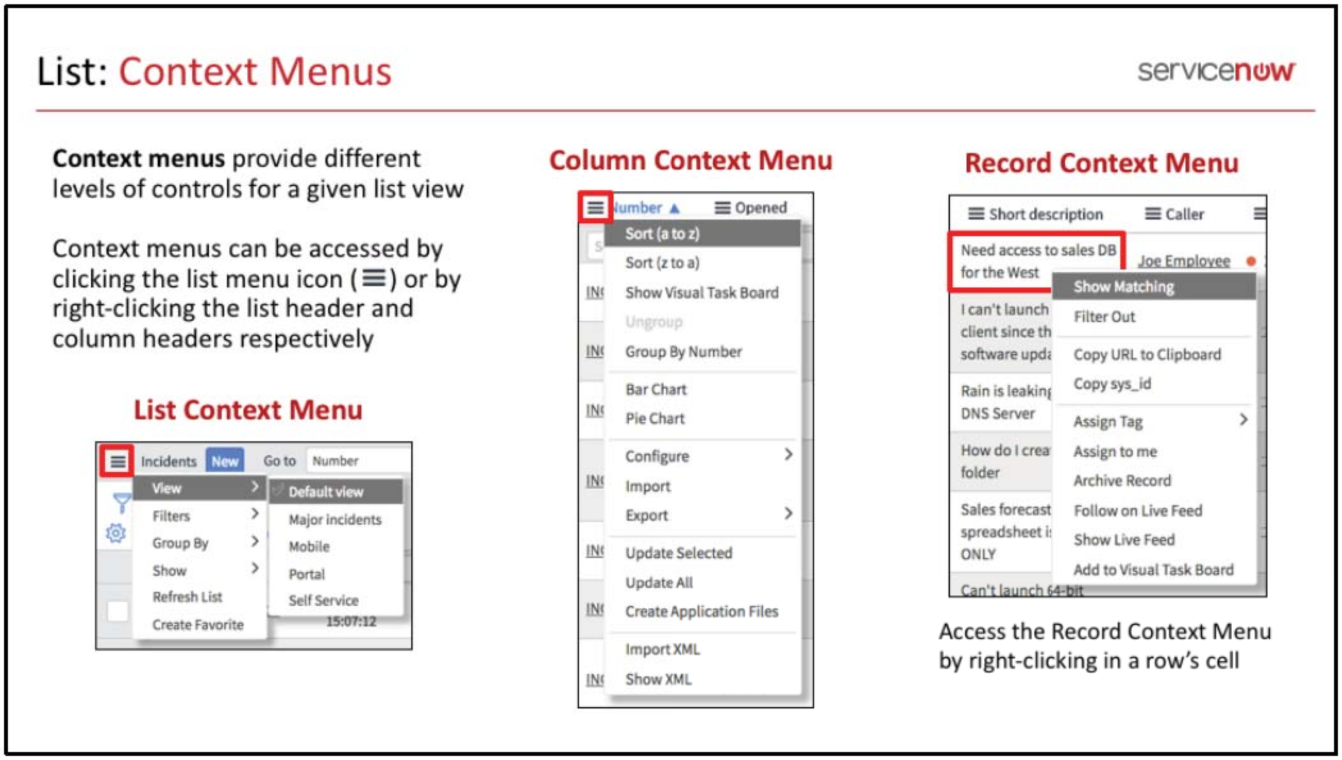
To switch between the different views of columns on a list (as shown here), open the List Context Menu then select **View**. Then, select the name of the desired view.

The view name appears in brackets beside the table list title and form record type when a view other than the Default view is selected.

NOTE: Switching views on a form will attempt to save all changes made to the record. A message displays asking to save or discard all changes made to the record, before the form reloads and displays the selected view.

Sort Controls: A list that is displayed to a user for the first time will be sorted by one of the following:

- The **order** field, if one is present in the table
- The **number** field, if one is present in the table
- The **name** field, if one is present in the table
- The field specified as the display field for the table



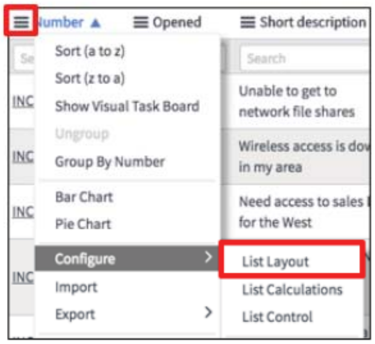
List Context (or control) menus, also sometimes called Additional Actions, can be accessed from lists, columns, or on records by using right-click menus which provide different levels of controls:

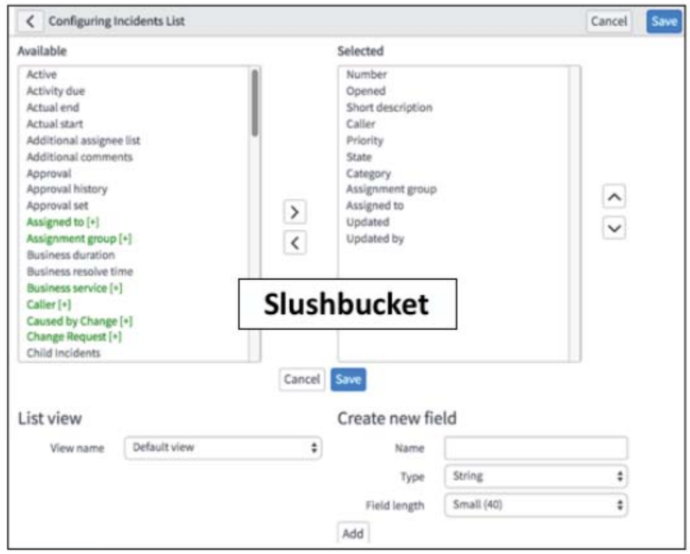
- **List Context Menu**: Click the list context menu icon next to the title of the list (Incidents in this example) to access options related to viewing and filtering the entire incidents list.
- **Column Context Menu**: Click the column context menu icon in the desired column header to display actions related to that column, such as creating quick reports, configuring the list, and exporting data.
- **Record Context Menu**: Right-click in a row's cell to see a menu with actions related to the values in that cell, such as filtering options, assigning tags, and more.

List: Layout Configuration

Configure a list to show or hide fields from a view, as well as change the list column order

Click the column context menu icon and select **Configure > List Layout**



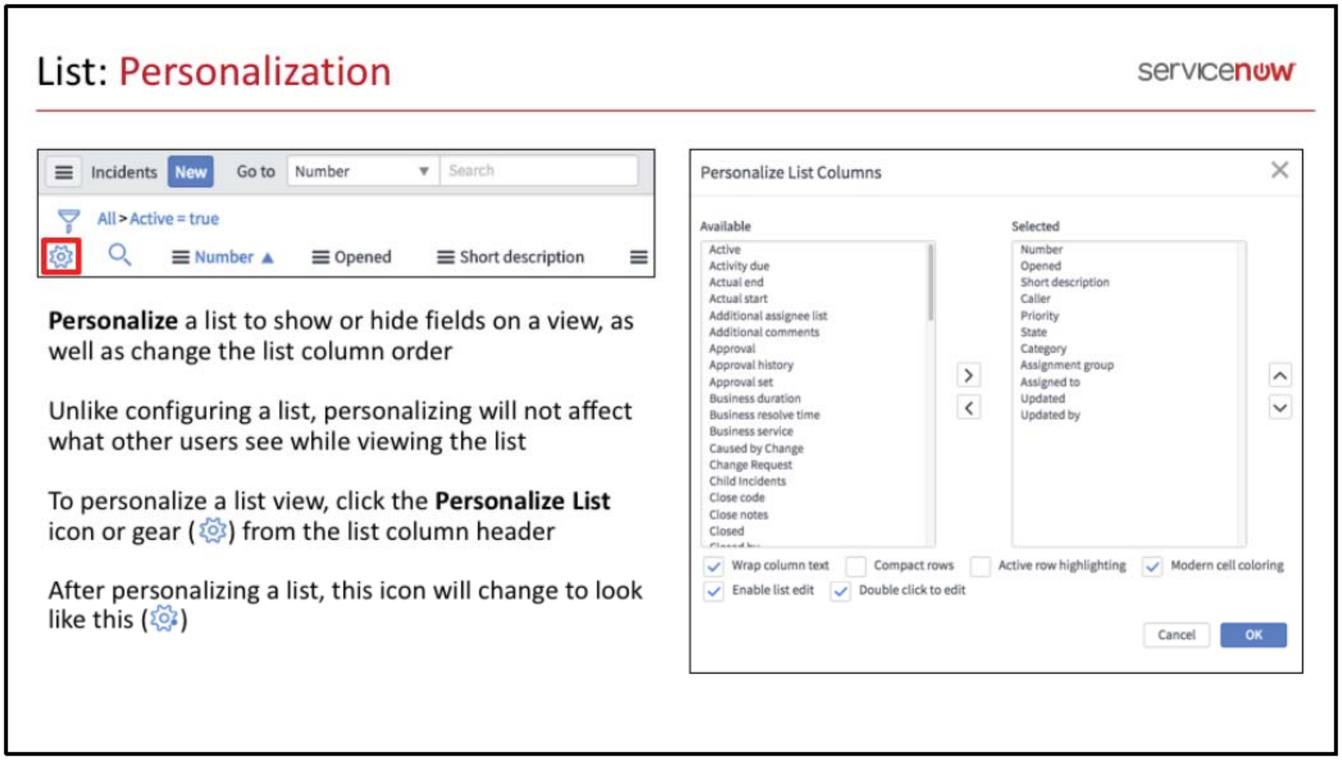


Users with the **admin** or **personalize_list** role can add or remove columns (fields) from a list or change the order in which the columns appear in the list, for all users.

To do so, navigate to the list, then open the **column context menu**, then select **Configure,** finally, select **List Layout**.

The slushbucket opens and has two sections: the available items on the left, and the selected items on the right. Items from the available section can be added to the list and items from the selected section can be removed from the list.

Once items are in the selected section, there are controls to adjust their order (up or down) on the list.



Personalize List Columns modifies a list for an individual user; it does **not** affect the platform default. List layout changes made using **List Layout** will affect everyone, across the the entire instance, except for individuals using personalized layouts set via Personalize List.

The following can be done through Personalize List Columns:

- **Add Columns:** In the available section, select each column you want to add and press the add icon
- **Remove Columns**: In the selected section, select each column you want to remove and press the remove icon
- **Rearrange Columns**: In the selected section, select the column(s) you want to reorder and use the up or down icons to place the columns in the desired order
- **Reset Column Defaults**: Return the list's columns to the default list's view definition

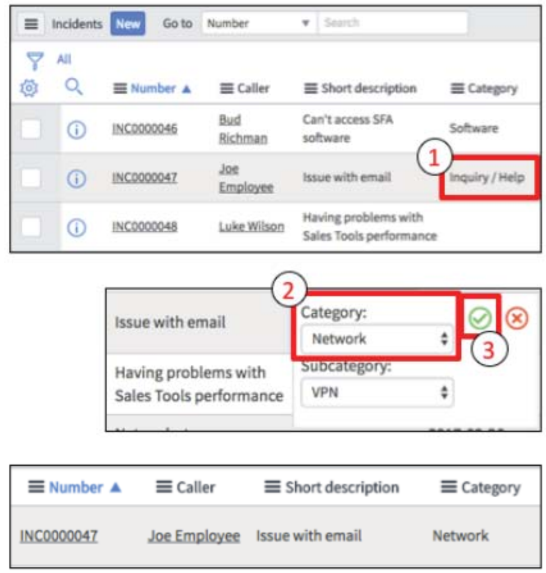
List: List Editing

servicenow

The **List Editor** allows a field value to be edited in a list without opening the form

Locate a record with the field value to change:

1. Double-click in an empty area of the field
2. Enter the appropriate value(s)
3. Save the record by clicking the save (✓) icon
   – Clicking the cancel (⊗) icon or pressing the Escape key retains the original value



Users can edit data in lists using various methods but certain field types cannot be edited. Additionally, list editing is disabled for some tables.

The list editor is the quickest method to update a field on multiple records.

Procedure

1. Select the records to be edited.
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. Administrators can configure the list editor and by default, list editing is disabled for some tables.
3. Enter the appropriate values and click the save icon.

Quick edit functions may also be used to edit records. Right-click a field and select the appropriate function:

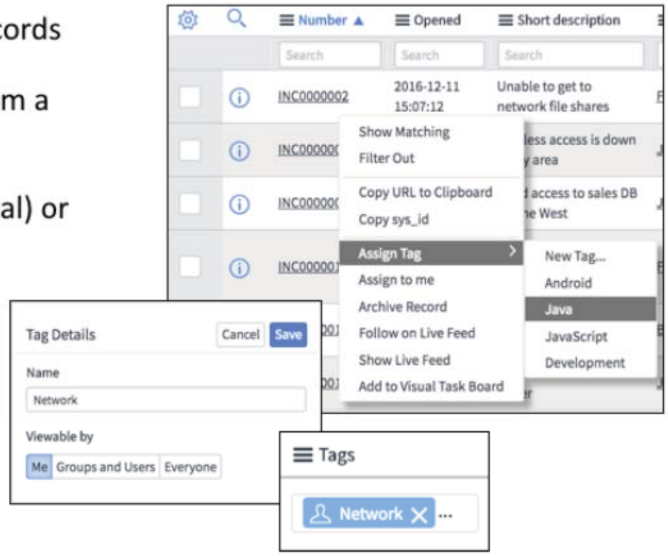
- **Assign to me:** For records that use assignments, places the logged-in user's name into the **Assigned to** field
- **Approve:** For records that use approvals, changes the approval state of the record to **Approved**
- **Reject:** For records that use approvals, changes the approval state of the record to **Rejected**
- **Assign tag:** For records that are to be tracked based on a user-defined label

Tags

Use **tags** to categorize, flag, and locate records

Tags can be created against any record from a list or form view

Tags can be made visible to any user (global) or visible only to specific users



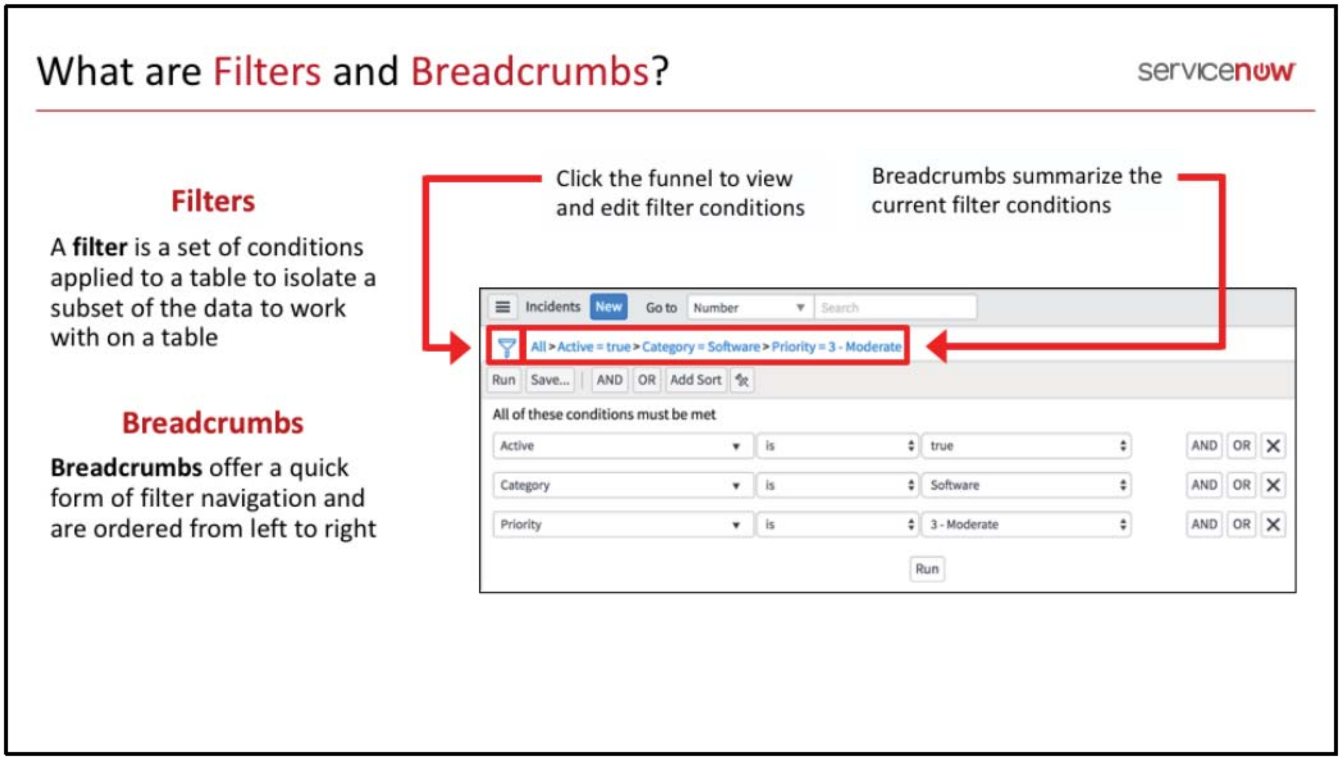
There are a few ways to assign tags to records:

- From the list view using inline field editing
- From a list using the record context menu
- Configuring tags to assign automatically

Use the **Viewable by** field when editing a tag to control how it is shared: visible only to the owner (Me), visible to the owner and specific groups or users (Groups and Users), or visible to everyone (Everyone).

To use the Everyone option under Viewable by, a user must have the **admin** or **tags_admin** role.

NOTE: Editing personal tags can be accomplished using the **My Tags** or **My Tagged Documents** modules.



Filters are used to specify exactly which records to displaywithin a selected list. For example, you may start with a list of all incidents but filter those records to view only active incidents assigned to you. Users can apply, create, modify, and save filters.

To view the filter applied to a list, click the funnel icon on the top left of the list. Here, you can add, remove, or edit **filter conditions** and rerun or save your filter.

Click **Run** to see the results of your filter, displayed in the list. To save a filter, click **Save**. A new field will appear where you can name your filter. After naming the filter, click the **Save** button to the right of the name field. The new filter will be available by selecting **Filters** from the list context menu.

The filter conditions applied to the list are summarized in the **breadcrumbs,** shown in blue letters across the top of the list. Not only do the breadcrumbs provide an “at-a-glance” view of the filter’s conditions, but you can also modify conditions and add to favorites your filter directly from the breadcrumbs.

Click a breadcrumb to remove all conditions to its right. Clicking the condition separator (>) before a condition to remove only that condition.

Add filter conditions to your favorites menu simply by dragging and dropping the breadcrumbs onto the navigator

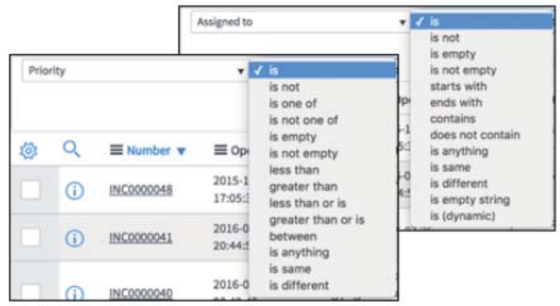
Filter Conditions and Filter Operators

servicenow

Three components of a **filter condition**:

1. Field 2. Operator 3. Value

A **filter operator** represents the action to take; it is a choice list based on the field type



The three parts of a filter condition are:

1. **Field**: A choice list based on the table and user access rights. The choice list includes fields on related tables by dot-walking.
2. **Operator**: A choice list based on the field type. For example, in the incident table, the greater than operator does not apply to the Active field but it does apply to the Priority field.
3. **Value**: A text entry field or a choice list, depending on the field type. For example, in the incident table, the Active field offers a choice list with the values true, false, and empty, while the Short description field offers a text entry field.

A filter operator can specify conditions including: it **is** this, it **is not** this, it is **same as,** it **is different** from, etc.

Filter operators will change depending on field data type, for example:

- **Text value**: is, is not, contains, is one of, starts with, ends with
- **Numeric**: is, is not, greater than, less than, greater than or is, less than or is
- **Date**: on, before, after, between, is more than, is less than

Finding Information: ServiceNow Search

Use any of the following search methods 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
- **Service Catalog**: Find catalog items
- **Filter Navigator**: Filter the items in the application navigator

List and Global Wildcard Searches

Wildcard Search Syntax	Does a Search
**mySearchTerm*	Contains
!**mySearchTerm*	Does not contain
mySearchTerm%	Starts with
%mySearchTerm	Ends with
=*mySearchTerm*	Equals
!=*mySearchTerm*	Does not equal
mySearchTerm No leading or trailing Wildcard(s)	Greater than or equal to *mySearchTerm* when using the list "Go to" search **only**

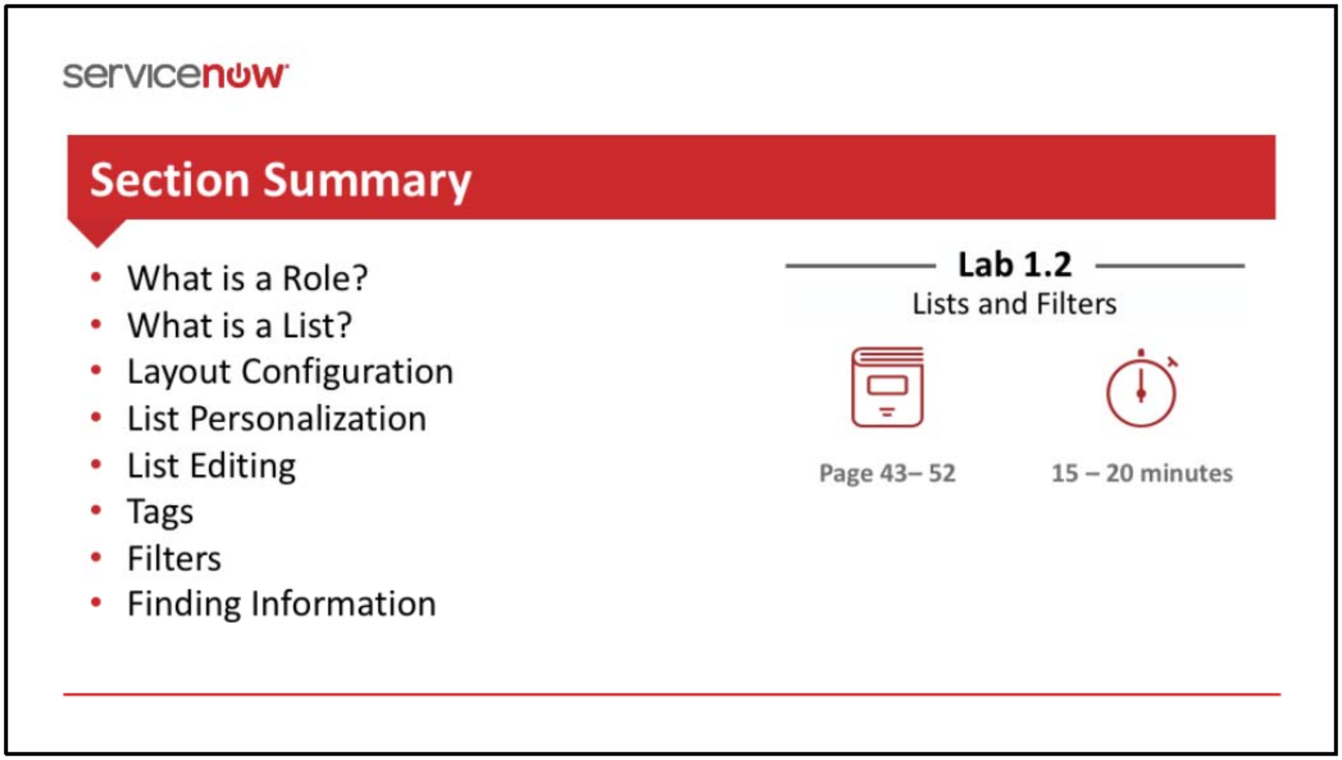
Find information quickly in ServiceNow by using any of the available searches:

- **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 Knowledge Article records
- **International Character Sets**: Perform searches with any Unicode characters
- **Punctuation**: Perform searches that contain punctuation

Wildcards use a symbol to represent zero or more characters and are available for searches. Various wildcards can be used to refine the search in lists (text searches of all fields), the global text search, and the Knowledge Base. Results with using wildcards may vary depending on the search method used.

Searches are not case sensitive. Use advanced options for more specific queries.

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



Lab 1.2 – Lists and Filters:

- Open an Update Set
- Create a new Infinity list view on the Incident table
- Practice filtering data on an incident list and saving a new filter
- Locate and update incident records using inline editing

LAB

Lists and Filters

1.2

15 – 20 minutes

Lab Goal

This lab will show you how to do the following:

- Open an Update Set
- Create a new Infinity list view on the Incident table
- Practice filtering data on an incident list and saving a new filter
- Locate and update incident records using inline editing

One goal of Cloud Dimensions with using ServiceNow is handling Infinity support.

Before the product is launched, however, Cloud Dimensions employees are actively testing Infinity devices.

Winnie Reich – manager of the Service Desk – has requested help from the Cloud Dimensions system administrator in creating a new Infinity view on the incident table.

This view will be configured to include the necessary fields for supporting Infinity, for both internal and external users alike.

Winnie has also asked her direct report, Kevin Edd, to create and share a list filter that will filter active incidents and display only those submitted by Infinity employee testers.

A. Open an Update Set

Before starting the lab, create an Update Set. Update Sets are used to capture configuration changes made to the platform and are explored later in class. Create an Update Set now and follow up with it at a relevant time.

1. Impersonate the **System Administrator** using the user menu.

NOTE: *If you have logged out of your instance, use the **System Administrator** (admin) **credentials** provided by your instructor*

---

2. **System Update Sets > Local Update Sets**.

3. From the list of local Update Sets, click the **New** button.

4. Fill out the form as follows:

   Name: **ServiceNow Fundamentals**
   State: **In progress** (auto-fills)
   Description: **Includes work completed in the ServiceNow Fundamentals course.**

5. Click **Submit and Make Current**.

***NOTE:** A message appears at the top of your instance indicating the Update Set has been set to the current Update Set. This means changes made to the platform will be captured in this Update Set moving forward.*

B. Create the Infinity List View

The system administrator user has the appropriate permissions for creating a new list view on incident – we will assume they have already received the requirements from Winnie Reich.

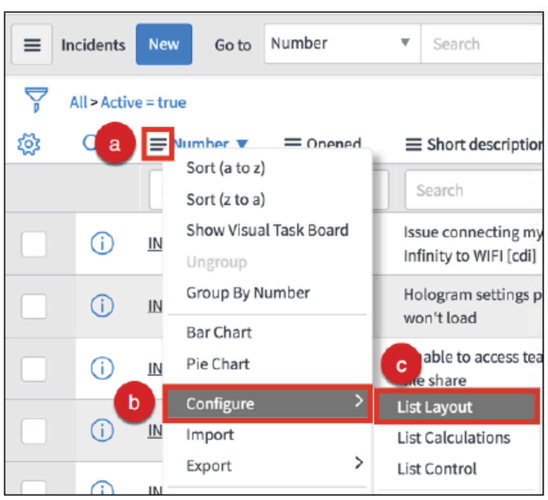
1. **Incident > Open**.

2. From the list column header, open the "**slushbucket**" to create a new list view:

   a) Open the **Column Context Menu**

   b) Select **Configure**

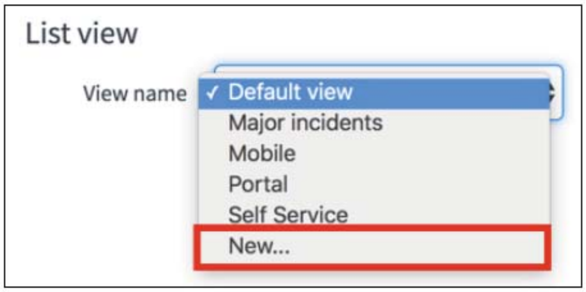
   c) Select **List Layout**



***NOTE**: Selecting any field will work, but **Number** was used in this example.*

3. Beneath the Available and Selected buckets, open the **View name** drop-down menu from the List view section.

4. Select **New…** at the bottom of the list:



NOTE: *Choosing an existing view from this list will allow you to modify it.*

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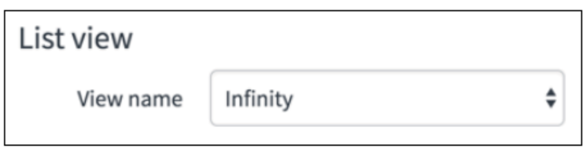
5. Enter the View name: **Infinity**.

6. Click **OK**.

   Nothing appears to have happened to the page but you should now notice **Infinity** as the selected List view:



7. Working with the **Available** and **Selected** buckets, use the **Add** and **Remove** buttons (">" and "<" icons, respectfully) to create the Infinity list view with the following fields:

   Number
   Priority
   State
   Caller
   Category
   Subcategory
   Short description
   Assignment group
   Assigned to
   Tags
   Updated

NOTE: *Ensure the fields are listed in this same order under **Selected**. Use the **Move up** and **Move down** arrows, on the right of Selected, to set the correct order.*

TIP: *You may select multiple fields under Available or Selected, then add or remove them with one click.*

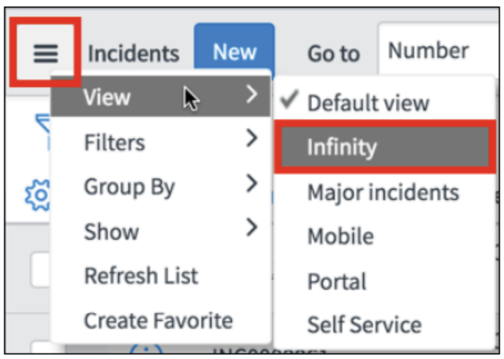
---

8. Once the fields have been added to the Selected bucket, click **Save**.

9. Impersonate **Kevin Edd** to confirm the view is available for the Service Desk group.

10. As Kevin Edd, navigate to **Incident > Open**.

11. Open the **List Context Menu** and select **View**, then finally select **Infinity**:



NOTE: *The list view name now appears at the top of the list in square brackets:*

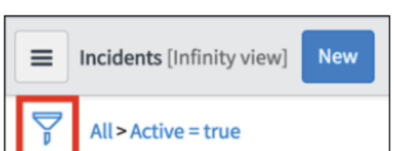
---

12. Confirm the fields appear in order, from left to right, as listed in step 7 above.

C. Apply and Save a Filter

Filters allow users to locate specific data quickly, and filters are also reusable. Kevin Edd will apply a filter that displays Cloud Dimensions Infinity incidents related to employee testing, then save the filter to share with his team for future use.

1. Open the filter condition builder by selecting the **Show / hide filter** icon (funnel):



2. Add the following **AND** condition:

   Tags | EIT

   NOTE: *This will search for all active incident records with* ***EIT*** *as one of its tags. The EIT tag is something Cloud Dimensions employees have created to help distinguish internal testing incidents from customer incidents – it stands for* ***Employee Infinity Testing****.*

   The filter should look like this:

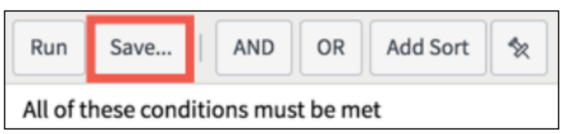
   

3. Click **Run** to apply the filter.

   There should be two incident records returned.

4. Open the filter condition builder again to save the filter for later use.

5. Click **Save…**

6. Enter **Infinity Testing** into the **Save as** field.

7. Next, select **Group** for **Visible to**.

   NOTE: *The ability to select a group to share wi dth others is provided by additional user permissions. For this exercise, the Service Desk group was granted the* ***filter_group*** *role.*

   ---

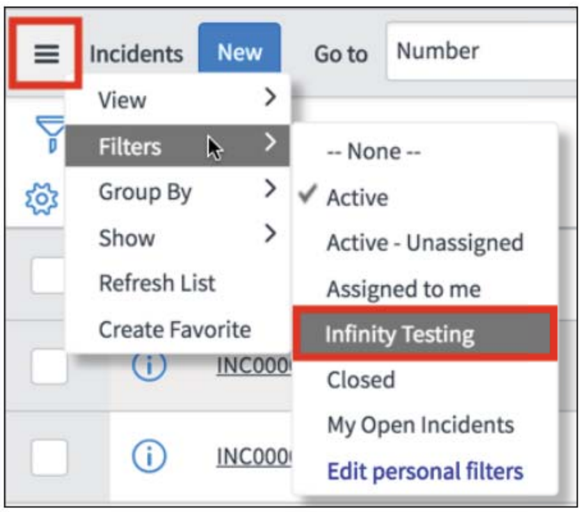
8. Input **Service Desk** into the group reference field to share this filter with its members.

9. Click **Save**:

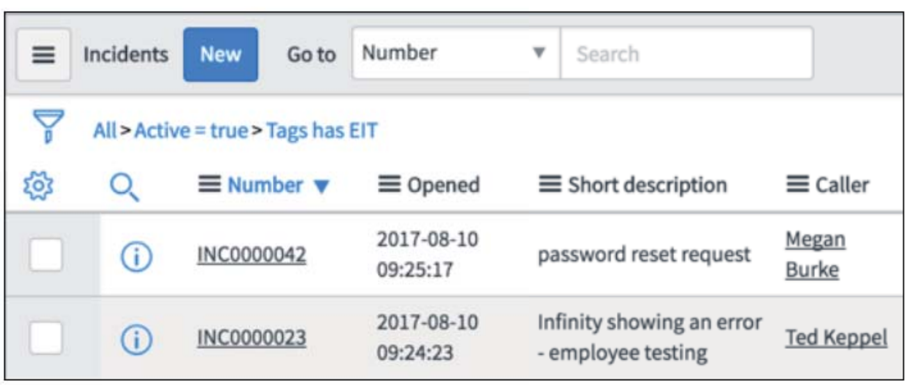
10. Impersonate **Megan Burke**, another member of the Service Desk group, to confirm the filter is now available for the Service Desk group.

11. **Incident > Open**.

12. Open the **List Context Menu** and select **Filters**, then finally select **Infinity Testing**:



13. The filtered incident list, containing two records, appears:



D. Locate a Missing Incident

Winnie Reich has emailed Kevin Edd to report an incident submitted by another employee that did not follow the current **EIT** tagging convention.

INC0000061 was submitted by Alissa Mountjoy and will need to be updated to include the **EIT** tag as the incident reports an error found with the Infinity holographic settings page.

1. Impersonate **Kevin Edd**.

2. Using methods of your choice, locate and open Alissa's incident record; **INC0000061**.

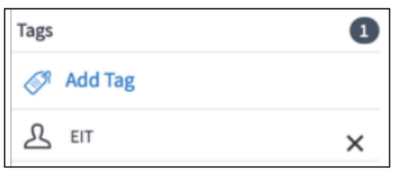
   HINT: Access the active record by navigating to an appropriate module and using list column header searches, filter conditions, or a global search for **INC0000061**.

3. With the record form displayed, open **More options** from the form header:

4. Click **Add Tag**.

5. Type **EIT** into the **Add tag…** field.

6. Press **Enter** on your keyboard to add the tag to the incident record:



7. **Update**.

8. Apply the **Infinity Testing** filter to the incident list to confirm all three Infinity testing records display:

Number	Priority	State	Caller	Category	Subcategory	Short description
INC0000061	5 - Planning	New	Alissa Mountjoy	Network		Infinity holographic settings page will not display
INC0000042	5 - Planning	New	Megan Burke	Database		password reset request
INC0000023	5 - Planning	New	Ted Keppel	Inquiry / Help		Infinity showing an error - employee testing

E. Update Infinity Incident Records

Now that all Infinity incident records are accounted for, Winnie Reich has asked Kevin Edd to ensure all records' categories are accurate based on the issue reported and described.

Use the inline editor to update a record's category value right from the list.

1. Find **INC0000042** and double-click on the category, **Database**:

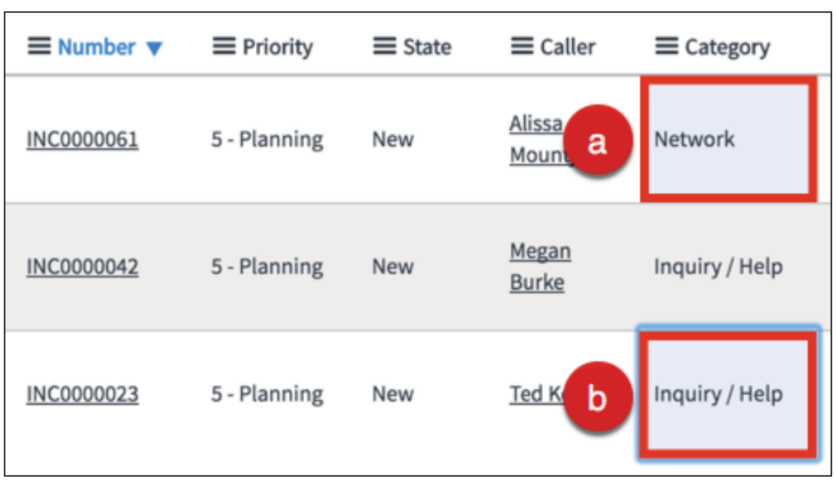
2. Use the Category drop-down to select **Inquiry / Help.**

3. Click the **Save** icon (green checkmark) to update the record:

4. Select multiple records to update field values with one set of steps:

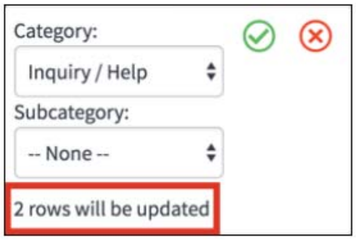
   a) Press **Shift** and click the **Network** category for INC0000061

   b) Hold **Shift** + **Ctrl** (**Shift** + **Command** on Mac) and click the **Inquiry / Help** category for INC0000023



5. Double-click on the **Inquiry / Help** category value for INC0000023 to open the **Category** drop-down.

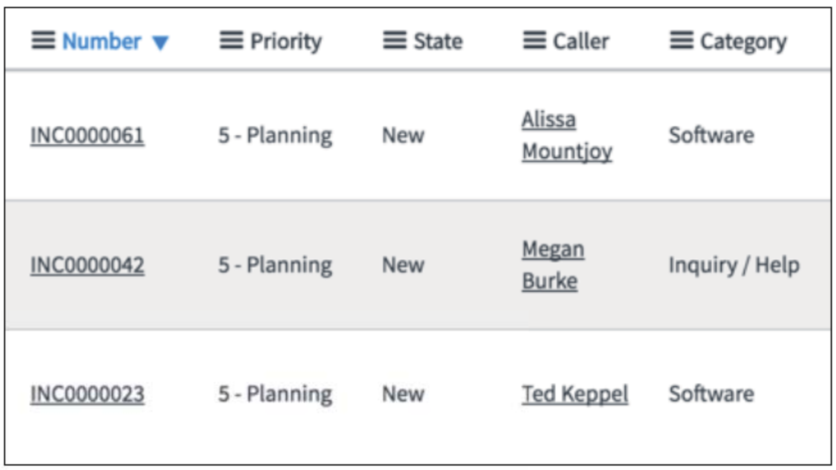
6. Notice it indicates two records will be updated:



7. Use the **Category** drop-down to select **Software**.

8. **Save** to update both records.

9. Your Infinity incident list should look like the following:

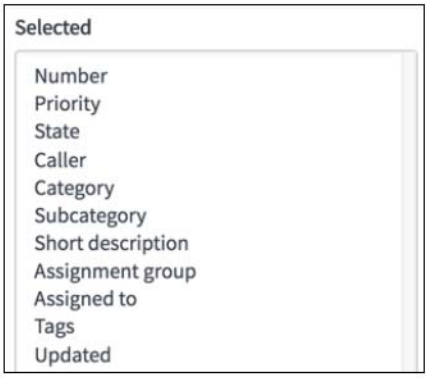


Number	Priority	State	Caller	Category
INC0000061	5 - Planning	New	Alissa Mountjoy	Software
INC0000042	5 - Planning	New	Megan Burke	Inquiry / Help
INC0000023	5 - Planning	New	Ted Keppel	Software

LAB VERIFICATION

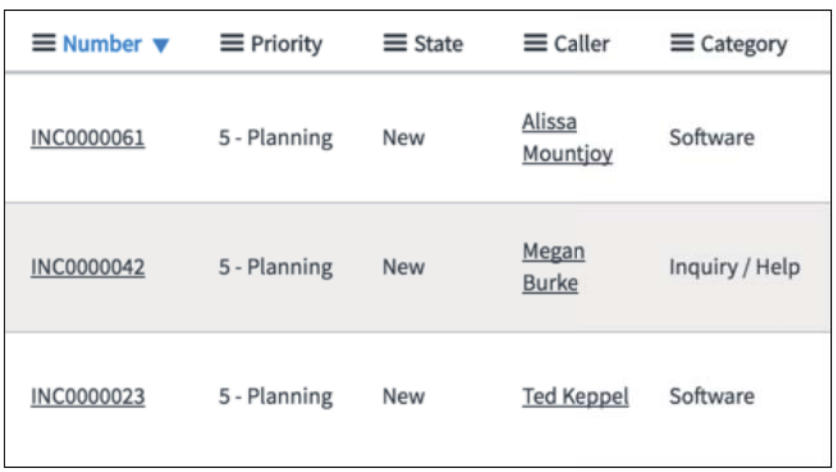
Infinity Incident List View

Infinity Incident List Fields



Infinity Testing List Filter

Updated Infinity Incident Records



Number	Priority	State	Caller	Category
INC0000061	5 - Planning	New	Alissa Mountjoy	Software
INC0000042	5 - Planning	New	Megan Burke	Inquiry / Help
INC0000023	5 - Planning	New	Ted Keppel	Software

Excellent! By completing this lab successfully, you have set things up perfectly for the next.

Module 1 – 1.3 Forms

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Objectives

- What is a Form?
  - Header Icons
  - Field Types
- Formatters and Related Lists
- Configuration
- Personalization
- Templates
- Saving Forms

What is a Form?

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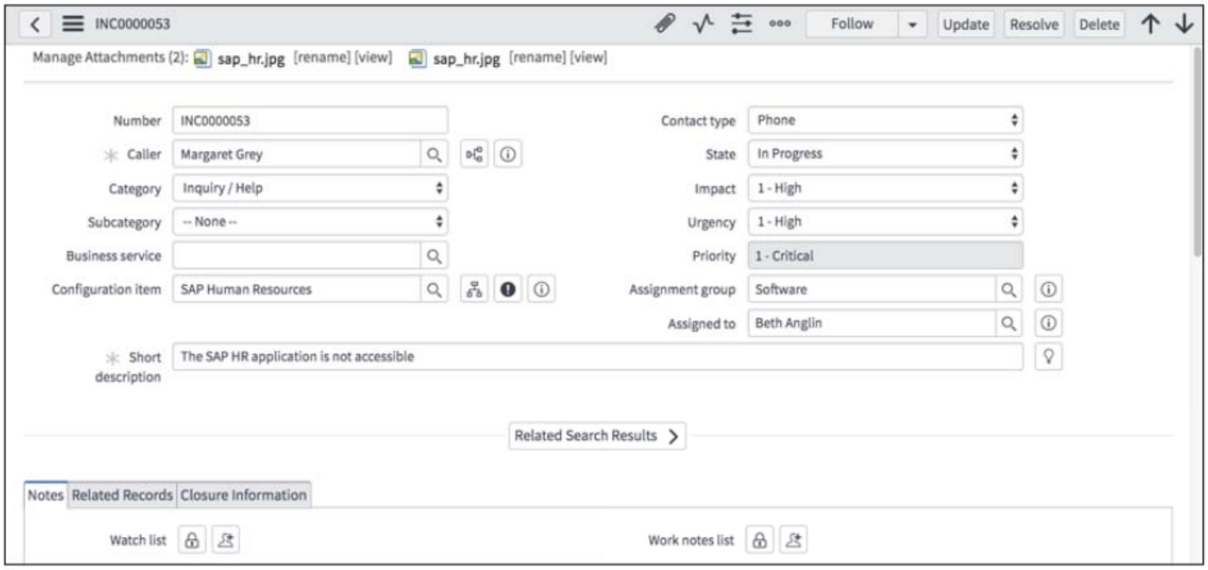
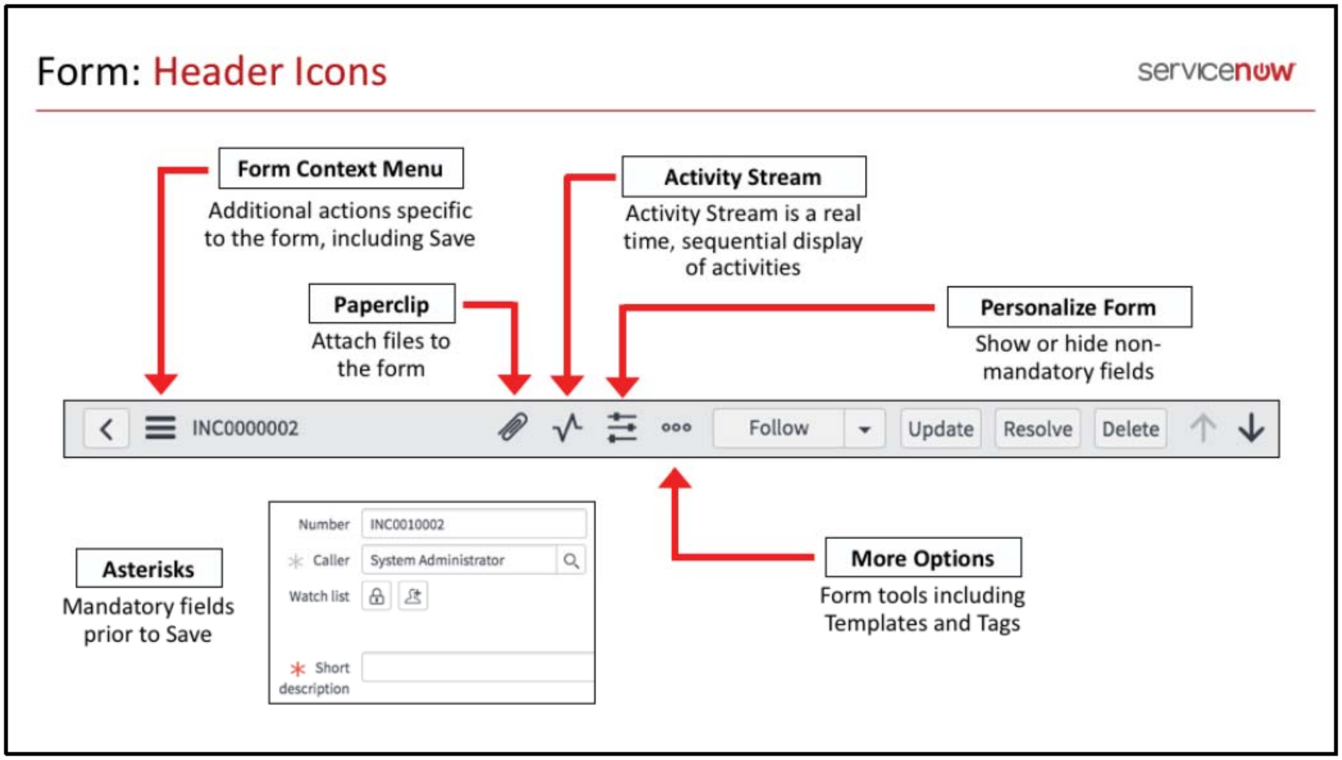
A **form** displays fields from one record; users can view and edit the record data



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

In addition to fields, the form can also contain sections and Related Lists. Related Lists show records in tables that have a relationship to the current record. For example, the User form features Roles and Groups Related Lists. Related Lists do not appear on a form until a record has been saved to the database.

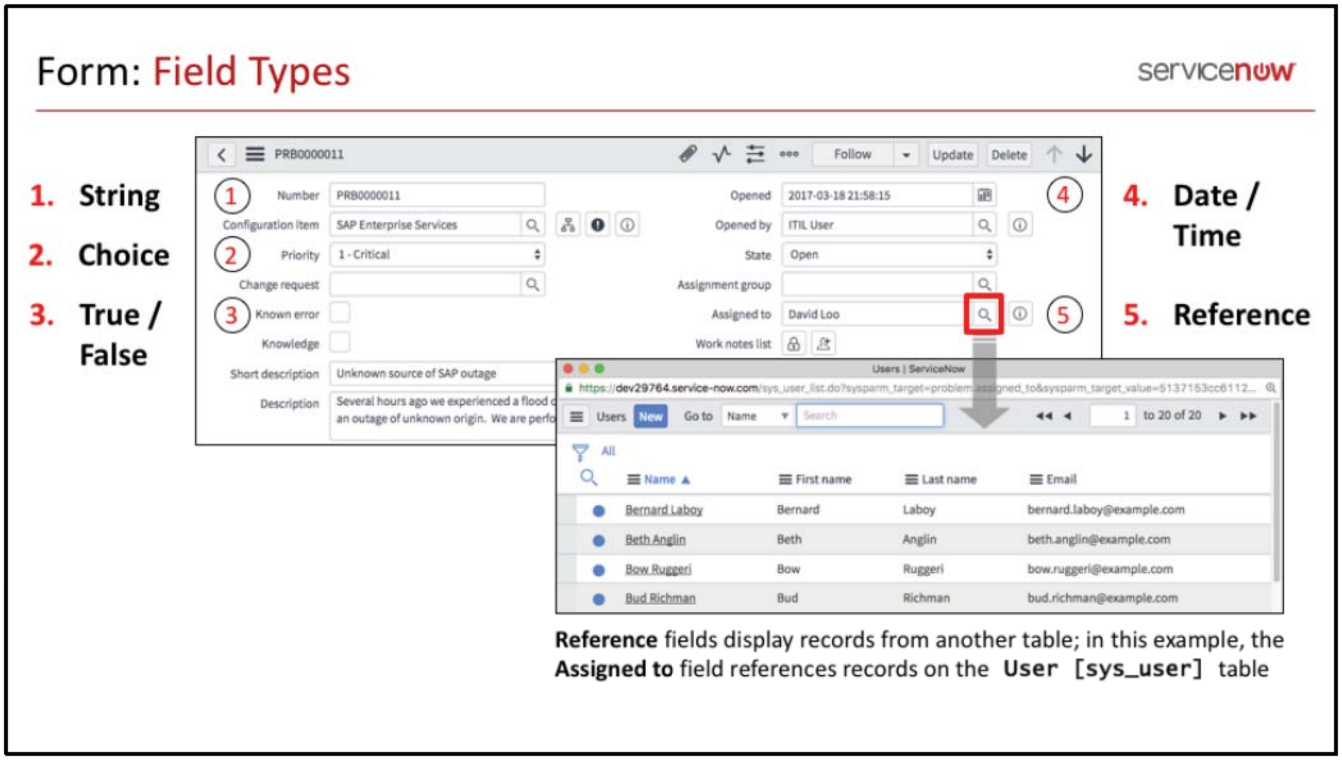
A form can load directly by searching on a record number in the **Global Text Search** or by clicking a record in a list.



Each form has different fields, UI actions, and options specific to the application under which it was created.

However, all forms have certain icons and functionalities in common:

- The **Form Context Menu** provides additional options specific to the form. **Save** can be found in the Form Context Menu and be used to save a form while remaining on the page.
- Use the paperclip icon to attach, remove, or rename files on a form.
- **Show Activity Stream** will display a time stamped history of all actions taken within a record.
- **Personalize** a form to show or hide important fields. **NOTE:** Mandatory fields can not be hidden.
- All fields marked with an asterisk are mandatory and must be filled out prior to saving the form. **NOTE:** The asterisk is red prior to filling out the field and grey once information has been entered
- Click **More options** to tag a form, use templates, send an email, and more.



Forms include various field types, each with unique attributes.

Some common field types include:

1. **String**: Freely populated using letters, numbers, and special characters. For 254 characters or less, the string field will be a single-line text field. Anything 255 characters or over will appear as a multi-line text box.
2. **Choice**: Drop down list of choices that can be configured.
3. **True/False**: Boolean field that appears as a check box.
4. **Date/Time**: Day and time of day, which can be selected with a calendar widget.
5. **Reference**: Query that displays records from another table.

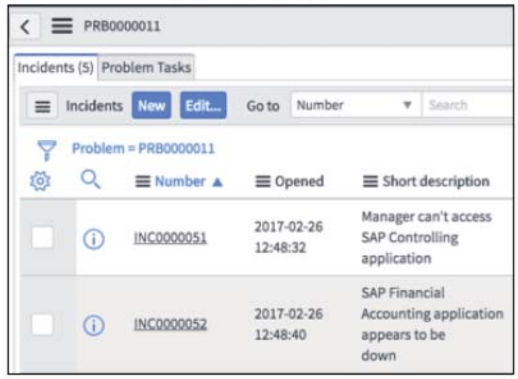
Form: Formatters and Related Lists

Formatter

A **formatter** is a form element used to display information that is not a field in the record

The activity formatter provides an easy way to track items not saved with a field in the record, for example, journal fields like comments and work notes

Related List



Related lists appear on forms and show records in tables that have relationships to the current record

Examples of **formatters** in the base platform include:

- **Activity formatter:** Displays the list of activities, or history, on a task form
- **Process flow formatter:** Displays the different stages in a linear process flow across the top of a record
- **Parent breadcrumbs formatter:** Provides breadcrumbs to show the parent or parents of the current task
- **Approval summarizer formatter:** Displays dynamic summary information about the request being approved
- **CI relations formatter:** Displays on the CI form a toolbar for viewing the relationships between the current CI and related CIs

Like any other list, users can view and modify information in **related lists,** as well as add a new record to the database. A default filter that is applied to a related list when a form loads can be created.

Administrators can configure related lists to appear on forms and in hierarchical lists. Related lists do not have a size limit.

If there are many related lists on a form or many records in the related lists, the form may load slowly.

Form: Configuration and Personalization

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Configuration

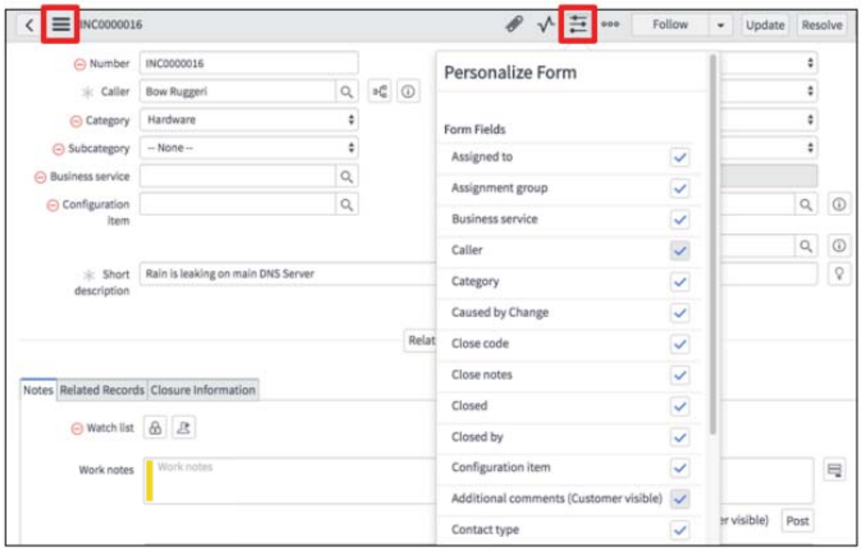
Configure a form to show or hide fields from a view, as well as change their position on screen

Click the form context menu icon and select **Configure > Form Layout**

Personalization

Click the **Personalize Form** icon (☰) to personalize which fields display

Personal form customizations will only affect what you see on a form – these changes do not affect others



With the personalize_form role, users can configure a form to show or hide fields from a view. Nfields can even be created on the table that is associated with the form, although this is not best practice.

Using the slushbucket, select the fields and the order in which you want them to appear. Available items that appear in green followed by a plus (+) sign represent reference fields. Accessing these fields on related tables is referred to as dot-walking.

Warning: It is not recommended to add the same field to more than one section of a form unless the field displays read-only data. Having two or more instances of an editable field can cause data loss and prevent the proper functioning of UI and data policies.

When the form personalization feature is activated, users can personalize fields to appear on a specific form view according to individual preferences.

In contrast to configuring a form, personalizing a form does not enable users to perform the following actions:

- Change the order of fields on the form
- Add fields that are not configured to appear on the form
- Hide mandatory fields

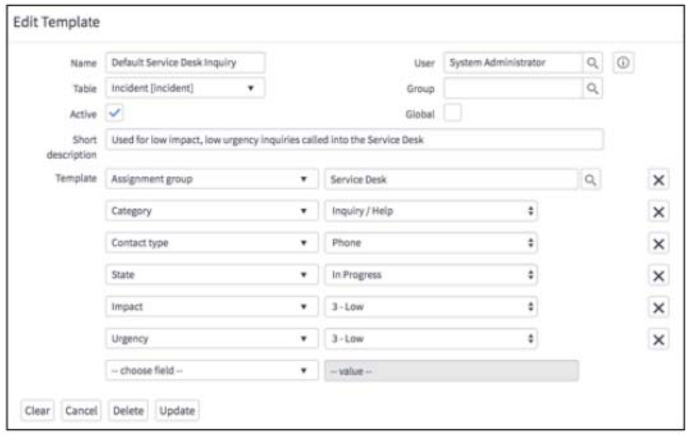
Form: Templates

servicenow

Templates allow fields to be populated automatically, simplifying the process of submitting new records

Click the **More options** icon (∘∘∘) from the form header, then click **Toggle Template Bar** to work with templates

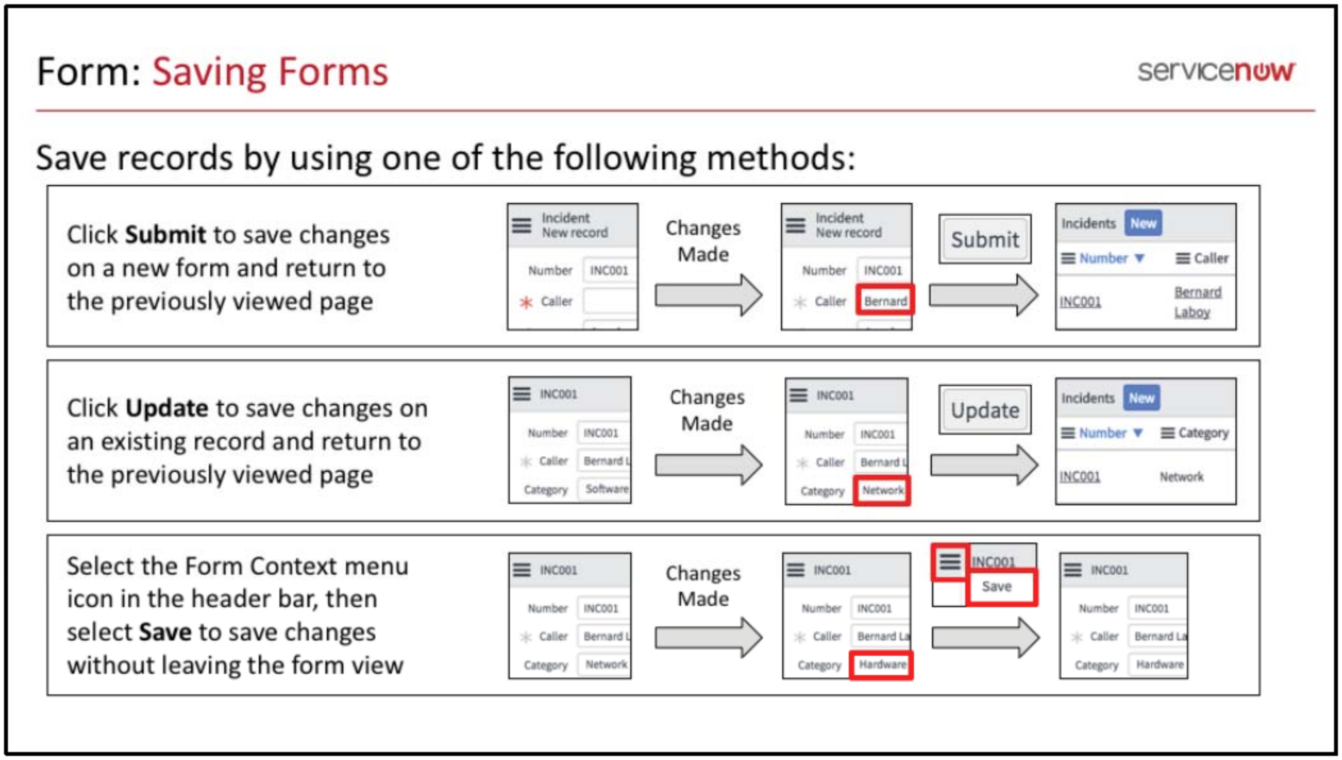
Use the template bar at the bottom of the form to manually apply, create, or edit templates



To use a template, populate the most-used fields for a specific table, save it as a template, and then make the template accessible to users. Users can manually apply a template when creating records, or an administrator can define scripts to apply templates automatically. Fields updated by the application of a template will have a checkmark icon next to the field label.

Create templates for the forms that are used frequently, such as incident, problem, and change. There is no limit to the number of templates that a user can create or access, but having many templates for each form makes the templates more complex to manage.

NOTE: Template creation should be restricted to select groups as it can be used to by-pass process, like mandatory fields, UI policies, etc. This is especially important for any record using condition based workflows.



The Insert, and Insert and Stay options are disabled by default for task records such as incidents and change requests but these options can be configured for task records.

NOTE: These options are enabled by default on User and CMDB records because they enable bulk entry of similar items.

Once enabled, select the Form Context menu icon in the header bar then select **Insert** or **Insert and Stay** to save a new record to the database instead of updating the current item.

There is no "Copy" but **Insert** emulates copy functionality and leaves the form.

Insert and Stay does the same but stays on the form.

When a form is saved, all the text in the Work Notes field is recorded to the Activity Log field. Work Notes and Additional Comments are fields that share information with various users associated to certain record types like incident or problem. Additional Comments are visible to all users accessing the record, whereas Work Notes are visible to only users with the **itil** role. The content in Additional Comments is emailed to the Watch List and Caller, and the content in Work Notes is emailed to the ITIL Watch List and Assigned to user when the form is saved.

NOTE: If you make changes to an existing record and then attempt to leave the form (whether using web browser controls such as the 'Back' button, or through the ServiceNow user interface), you will be prompted with a message asking if you are sure you want to leave the record without saving.

servicenow

Section Summary

- What is a Form?
- Formatters and Related Lists
- Configuration
- Personalization
- Templates
- Saving Forms

Lab 1.3
Forms

Pages 62 – 70

10 – 20 minutes

Lab 1.3 – Forms:

- Create and configure a new form view using the Form Designer
- Create and update Infinity incident records

LAB

1.3

Forms

10 – 20 minutes

Lab Goal

Lab Dependency: Requires the completion of Lab 1.2.

This lab will show you how to do the following:

- Create and configure a new form view using the Form Designer
- Create and update Infinity incident records

Internal employee testing of Infinity has proven worthwhile for a number of reasons.

Winnie Reich will lead an initiative to further improve and organize Infinity testing support by creating a form view on the incident table containing the appropriate fields and being capable of capturing field values that accurately identify reported issues.

A. Create the Infinity Form View

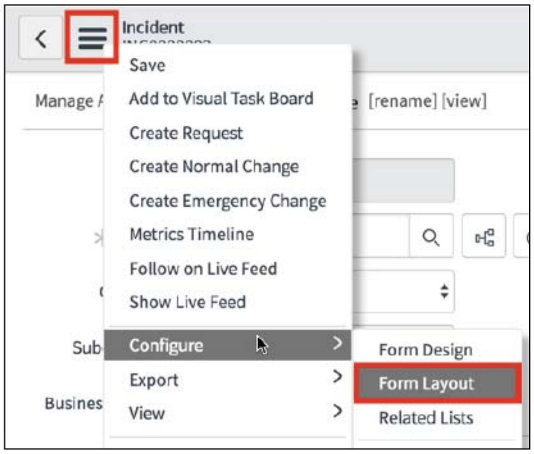
1. Impersonate **Winnie Reich**.

NOTE: *Winnie is inheriting the* ***personalize*** *role from a group that she belongs to, which allows her to configure forms and create new views.*

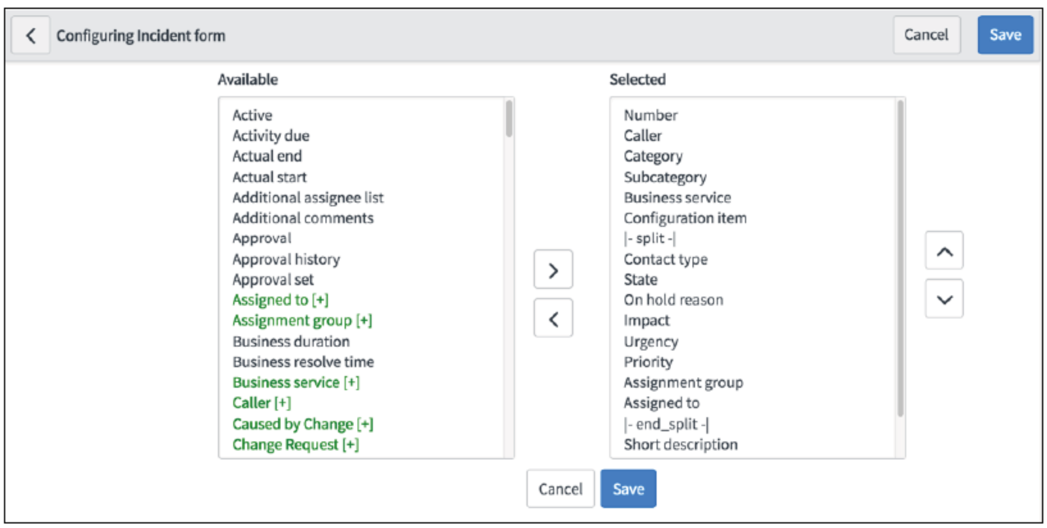
2. **Incident > Open**.

3. Open the record for **INC0000061**.

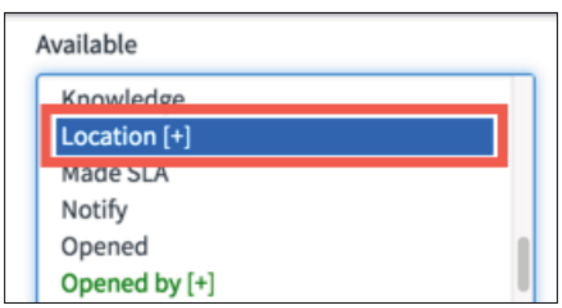
4. Open the **Form Context Menu** and select **Configure**, then finally select **Form Layout**:



The **Configuring Incident form** page displays:



5. Find and highlight the **Location** field under the Available list:



6. Click the **Add** button (>) between the Available and Selected list:

7. Doing this adds the Location field to the bottom of the **Selected** list.

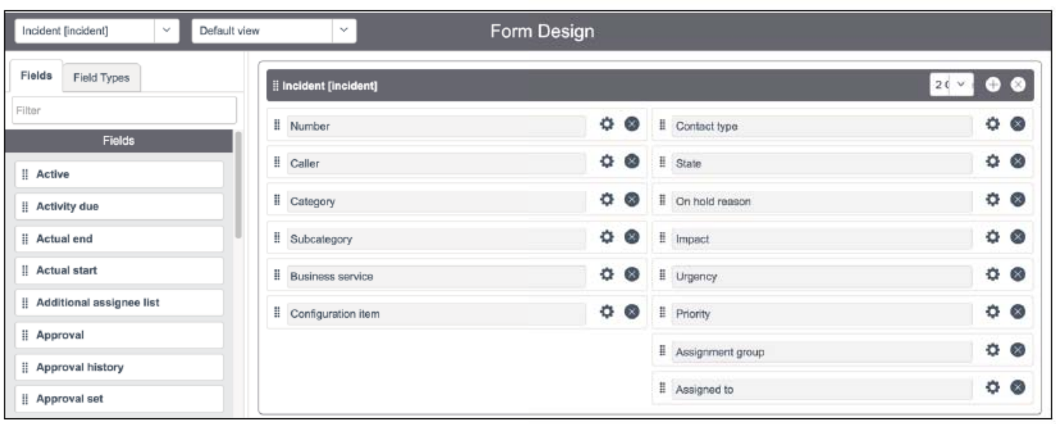
8. Use the **Move up** button (^) to move the **Location** field under **Configuration item**.

9. From the **Configuring incident form** page, click **Save** to return to the incident form.

Modify Form View with the Form Designer

1. Open the **Form Context Menu** and select **Configure**, but then select **Form Design**.

   The **Form Designer** will open in a new tab or window. Go to the page that looks like this:



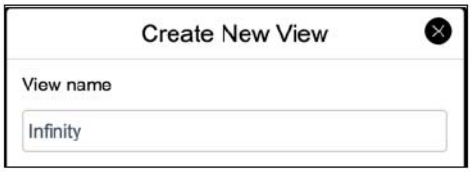
   The **Form Designer** offers an improved experience because of its graphical user interface, making it easier to visualize the form view's end result.

   Additionally, there are several configuration options available in this single interface.

   At the top left of the page are two drop-down menus in the header; the menu on the left indicates the table the form view is associated with, and the menu on the right includes the various views defined for the selected table.

2. Open the view (right) menu and select **New...** at the bottom of the list.

3. Enter the View name: **Infinity**:



4. Click **OK**.

   Notice the new view is automatically selected in the view menu on the page's header:

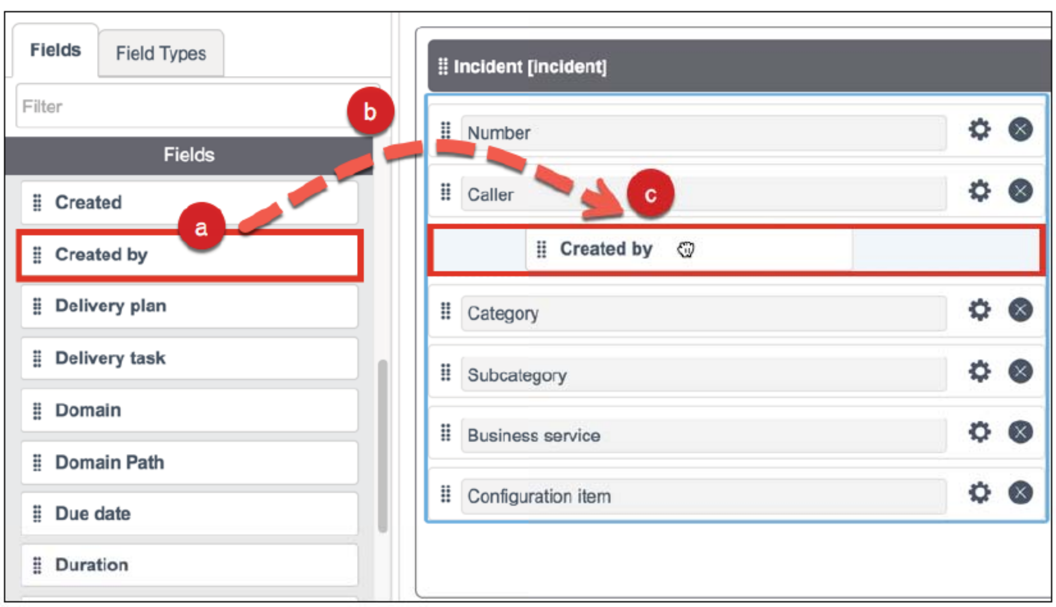
5. On the **Fields** tab of the Field Navigator on the left, scroll down to locate the **Created by** field.

6. Add the **Created by** field to the form view:

   a) Click and hold on the **Created by** field

   b) Drag **Created by** to the form layout, between **Caller** and **Category**

   c) Release your click to add the field



7. Repeat these steps to add the **Updated** and **Updated by** fields to the form layout, within the Incident section.

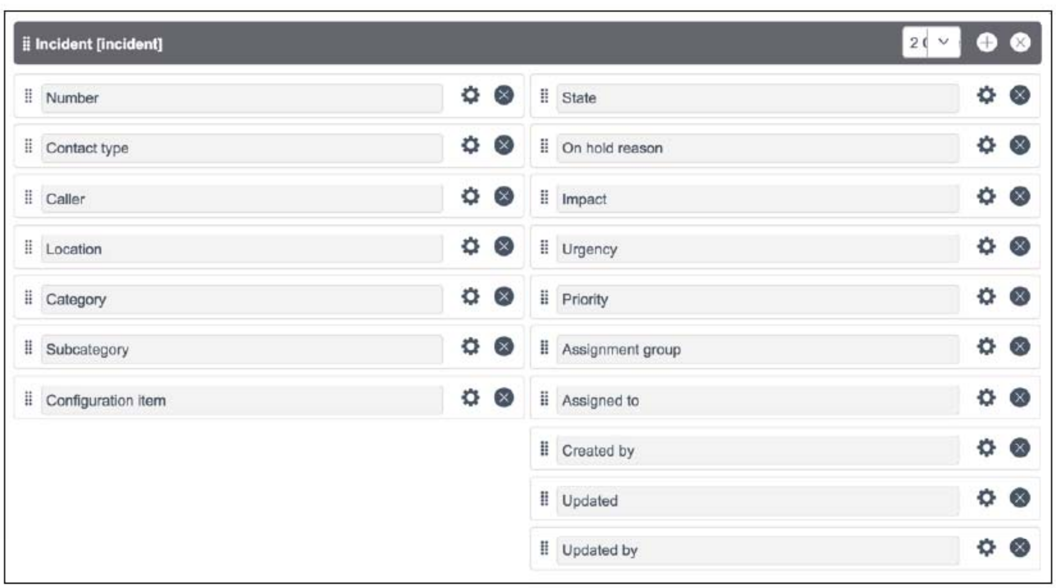
NOTE: *We will be reordering fields later.*

8. Find the **Business service** field on the form layout, then click the **Remove this field** icon (circled x) to remove it from the view:

NOTE: *Removing a field returns it to the* ***Fields*** *tab of the Field Navigator, so it may be re-added if desired.*

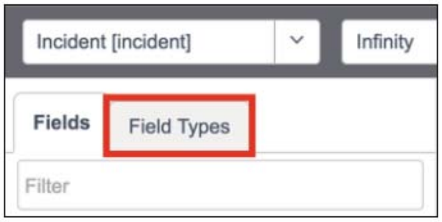
9. Click and drag the **Contact type** field to be listed beneath the **Number** field:

10. Repeat this step to reorganize the fields in the Incident section to match this layout:



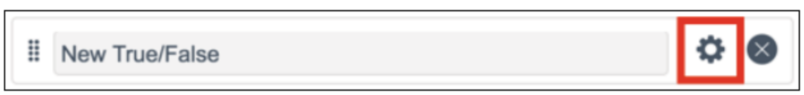
Define a New Field

1. From the Field Navigator, click the **Field Types** tab to add a new field to the form layout:



2. Scroll down to find the **True/False** field type, then add the field to the form layout under the **Caller** field:

3. Click the **Edit this field** icon (gear) to configure the field's properties:



4. Input the following values:

   Label: **Employee**
   Name: **u_employee**

NOTE: *The name features the prefix* ***u_*** *to indicate it is a user-created item. This is a common naming convention used throughout ServiceNow.*

---

5. Close the **Properties** window by clicking the close icon (circled x).

6. Click the **Save** action from the page header to save the form view:

7. Close the **Form Designer** tab/window, and return to the ServiceNow instance.

8. Use the **Form Context Menu** to reload the form (**Reload form**).

9. Now open the **Form Context Menu** and select **View**, then finally select **Infinity**.

   The new **Infinity** form view should load and display as designed!

B. Create and Update Incident Records

With the new form view defined, the next step is to create and update Infinity testing records by inputting the information into the correct fields.

Steps for creating a new single incident with the State "In Progress" and EIT tag, and "employee" checkbox selected. Make sure Assignment group is set as well.

1. **Incident > Create New**.

2. Fill in the rest of the fields as follows:

   Contact type: **Walk-in**
   Caller: **Buster Wubbel**
   Employee: **[checked]**
   Category: **Software**
   State: **In Progress**
   Assignment group: **Service Desk**
   Short description: **Issue discovered with two step authentication**
   Description: **Authentication requirements for logging into Infinity are not working as expected.**

   NOTE: *The **Location** field may have populated automatically because of the Caller value inputted.*

   ---

3. **Save**.

4. Open **More options** from the form header.

5. Click **Add Tag**.

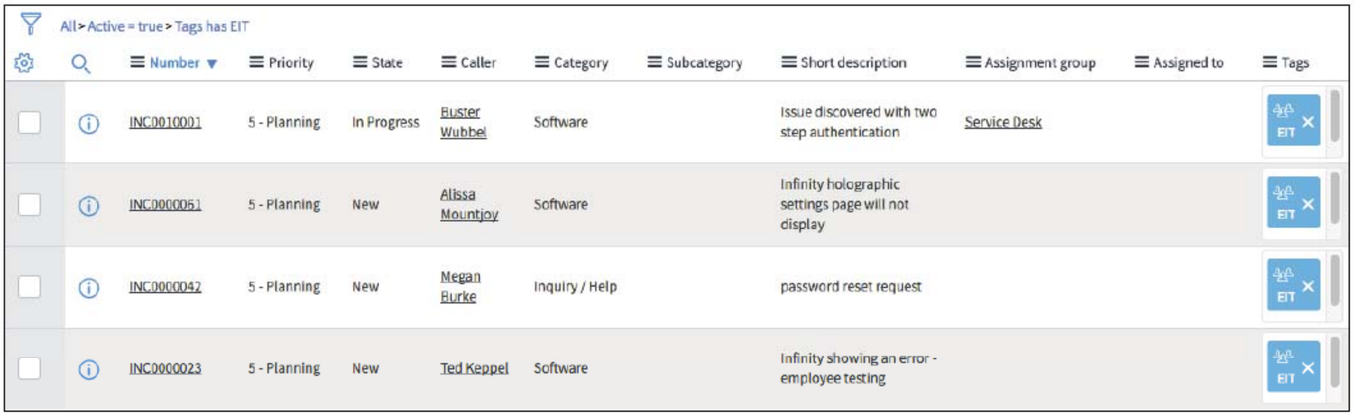
6. Search for and select the **EIT** tag.

7. **Update**.

8. If the active incidents list does not display, navigate to **Incident > Open**.

9. Apply the **Infinity Testing** filter.

There are now four total open Infinity employee incident records:



***NOTE:** The new incident number may be different in your instance.*

Challenge

Update records to change the state, assignment group and check "Employee" checkbox.

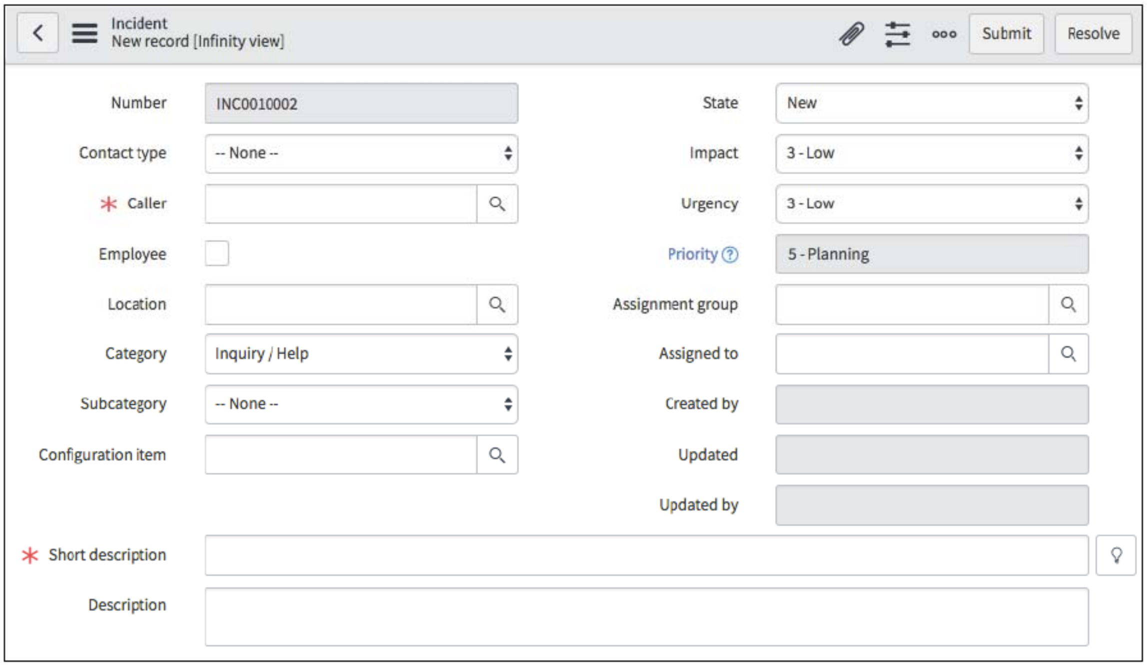
As **Kevin Edd**, use the strategies of your choice to update the following records:

Number	Employee	State	Assignment group
INC0000023	True	In Progress	Service Desk
INC0000042	True	In progress	Service Desk
INC0000061	True	On Hold	Service Desk

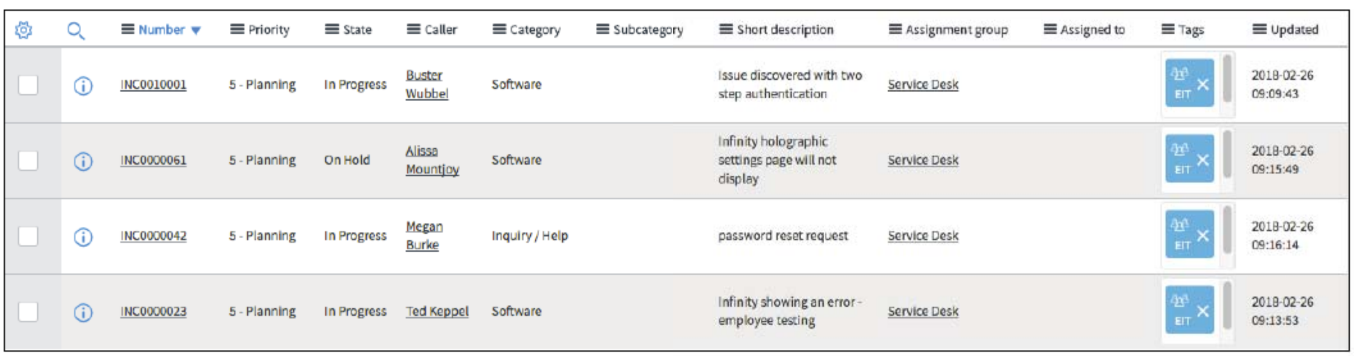
***NOTE:** If required, set the value for the **On hold reason** field to **Awaiting Caller**.*

LAB VERIFICATION

Infinity Incident Form View



Updated Infinity Incident Records



Number	Priority	State	Caller	Category	Subcategory	Short description	Assignment group	Assigned to	Tags	Updated
INC0010001	5 - Planning	In Progress	Buster Wubbel	Software		Issue discovered with two step authentication	Service Desk		EIT	2018-02-26 09:09:43
INC0000061	5 - Planning	On Hold	Alissa Mountjoy	Software		Infinity holographic settings page will not display	Service Desk		EIT	2018-02-26 09:15:49
INC0000042	5 - Planning	In Progress	Megan Burke	Inquiry / Help		password reset request	Service Desk		EIT	2018-02-26 09:16:14
INC0000023	5 - Planning	In Progress	Ted Keppel	Software		Infinity showing an error - employee testing	Service Desk		EIT	2018-02-26 09:13:53

Well done – you have created a new form view!

Module 1 – 1.4 Branding

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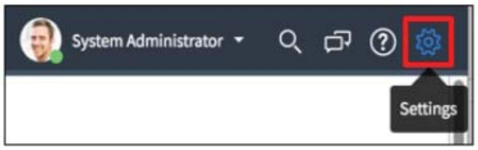
Objectives

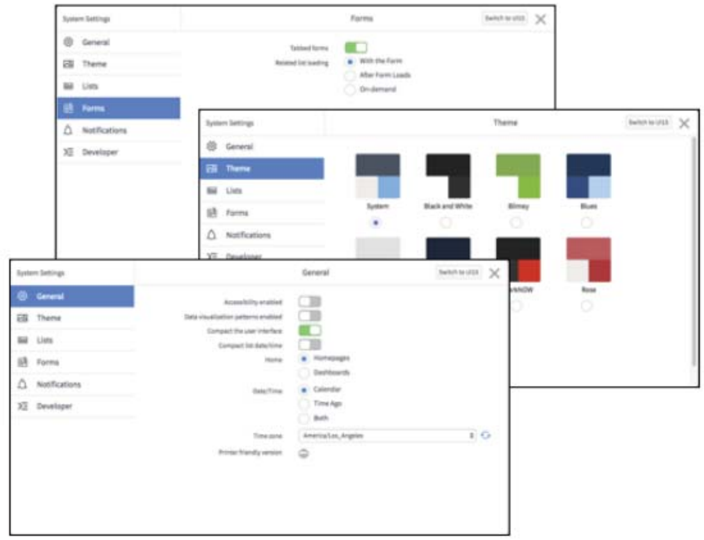
- Instance Settings
- Application Configuration: Guided Setup
- Basic Configuration: System Branding

Banner Frame: Instance Settings



Click the **Settings** icon from the banner frame to customize your instance

These settings affect only your user account and are retained each time you log in

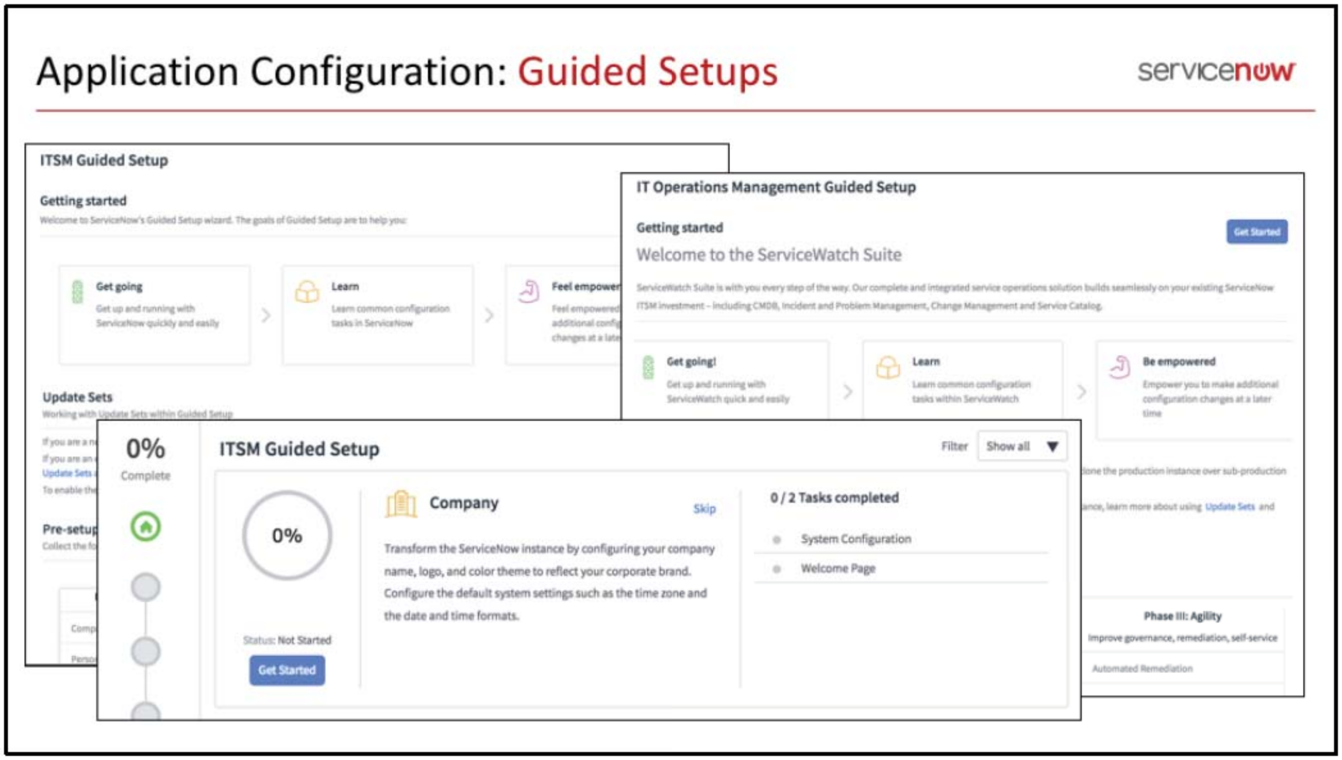


The Settings icon (gear) in the upper-righthand side of the Banner Frame contains additional settings and options for personalizing your view of the platform.

NOTE: Users may be limited to what settings they have access to based on their role.

After selecting the Settings icon, the categories on the left (General, Theme, Lists, Forms, Notifications, and Developer) provide different settings, including:

- **General Tab: Compact the user interface** optimizes the UI to display more information in the browser window when this setting is enabled
- **Theme Tab**: Select a theme for the user interface. Select the **System** theme to return to the default theme
- **Lists Tab: Wrap longer text in list columns** allows for long strings to wrap in list columns instead of appearing as one long line
- **Forms Tab:** Form sections and related lists appear in tabs when the **Tabbed forms** setting is enabled. Also **Related list loading** is used to determine when Related Lists load on forms.
- **Notifications Tab:** Allows you to enable various notification channels, as well as manage your notification subscriptions
- **Developer Tab**: Settings for ServiceNow Application developers



Users with an administrator role may use a **Guided Setup** to go through suggested steps to configure applications on the ServiceNow instance.

Using the **ITSM Guided Setup**, users can perform structured configuration activities that help configure ITSM applications and can monitor the progress. Each configuration activity in ITSM Guided Setup is designed to simplify the configurations by providing access to contextual embedded help, contextual documentation on the ServiceNow product documentation site, and guided tours (if available for an activity).

The ITSM Guided Setup configures the common platform settings through the following categories:

- **Company**: Activities under this category help you to configure company name, logo, and color theme to reflect your corporate brand and to configure the default system settings such as the time zone and the date and time formats
- **Connectivity**: Activities under this category help you to configure your ServiceNow instance to support inbound and outbound email notifications and to integrate it with your existing LDAP and Single Sign-On (SSO) solutions
- **People**: In case you do not use LDAP to import data into your ServiceNow instance, activities under this category can help you to import Users, Groups, Group Members, Companies, Departments, and Locations and to assign roles to groups

In addition to the ITSM Guided Setup, there are guided setups for ITOM and HR as well.

Basic Configuration: System Branding

Browser Tab

Cloud Dimensions ServiceNow

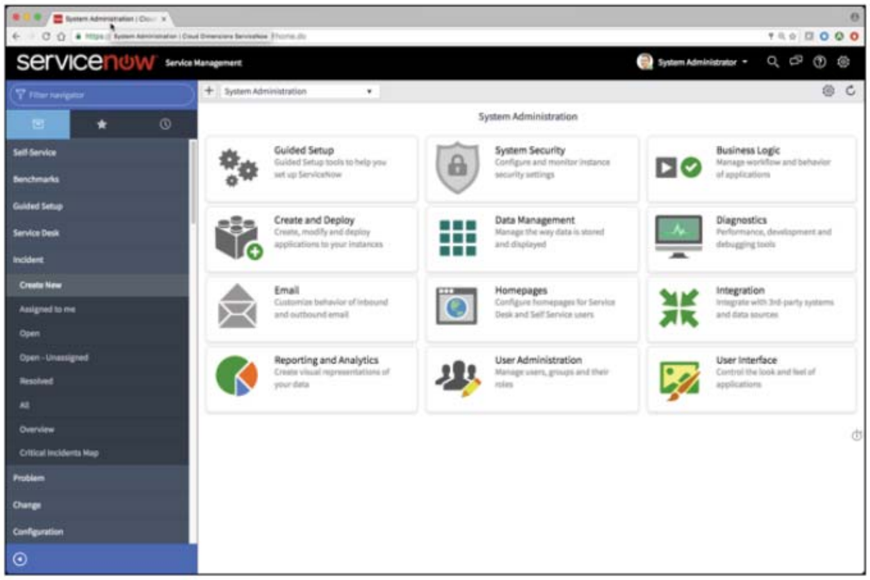
Banner Image

servicenow

Navigation Colors:

System Properties

System Properties
Basic Configuration
Basic Configuration UI16



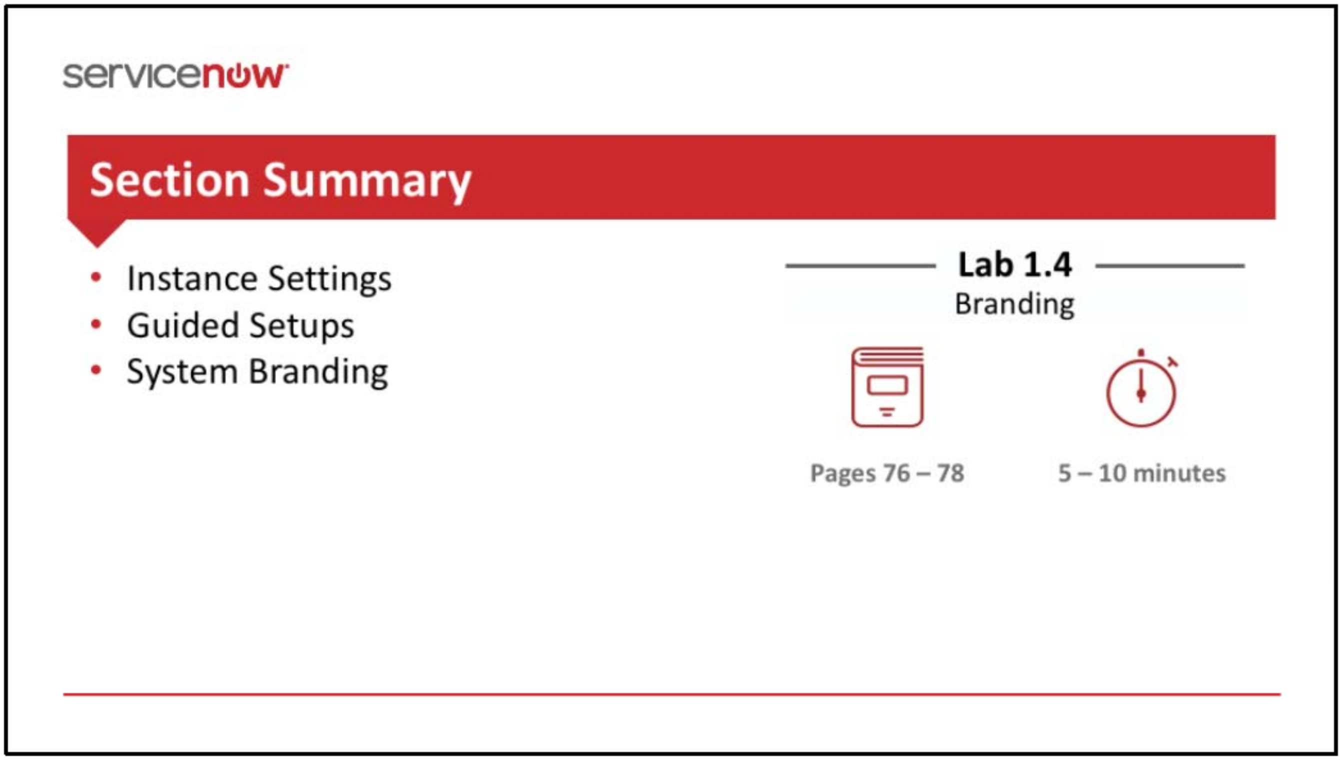
Many branding activities are grouped together in **System Properties > Basic Configuration UI16.**

Customization and branding options include:

- Banner image, text and colors
- Navigator background and text colors

Features which can also be customized:

- Browser tab title
- Color: Use the built-in color pickers to dynamically pick and preview branding options
- System date/time formatting



Lab 1.4 – Branding:

- Use the ITSM Guided Setup to apply branding to the instance

Branding

LAB

1.4

5 – 10 minutes

Lab Goal

This lab will show you how to do the following:

- Use the ITSM Guided Setup to apply branding to the instance

Cloud Dimensions recognizes the importance of aligning ServiceNow's branding with the rest of the organization so that users automatically feel familiar, seeing it as a trusted platform. Therefore the ServiceNow instance will be branded to achieve this.

Required Resource: CloudDimensions-CD-Logo.png

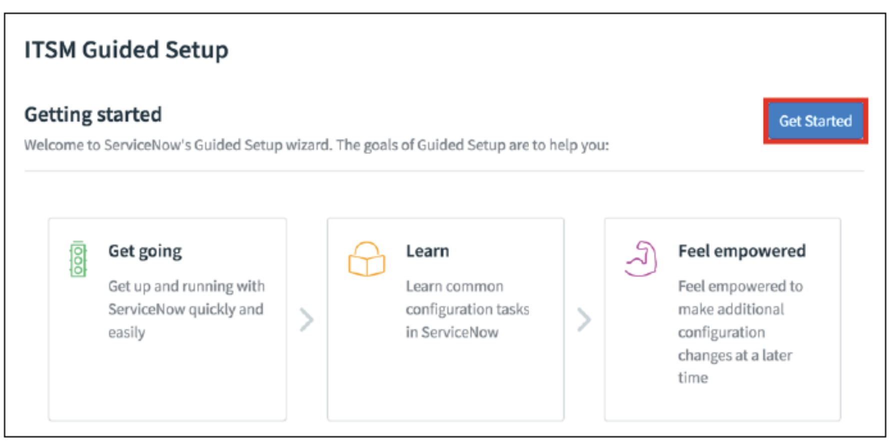
A. Apply Branding with the ITSM Guided Setup

Begin the lab by impersonating the system administrator. This user has the appropriate permissions for defining platform-wide properties. We will work with the ITSM Guided Setup to get started on company branding.

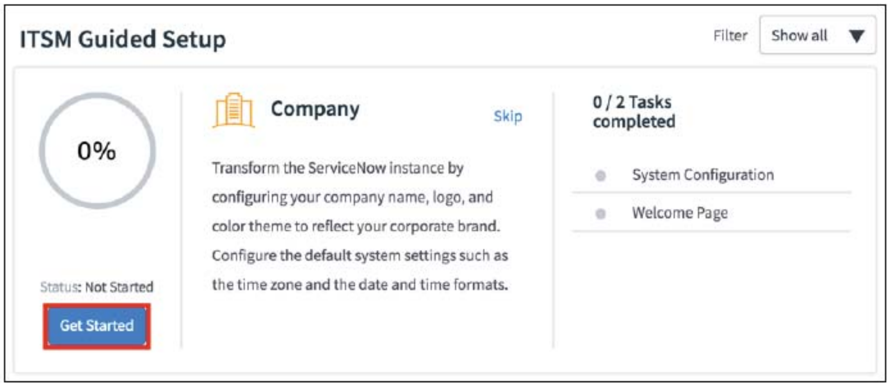
1. Impersonate the **System Administrator**.

2. **Guided Setup > ITSM Guided Setup**.

   After the Guided Setup page loads, click the **Get Started** button:

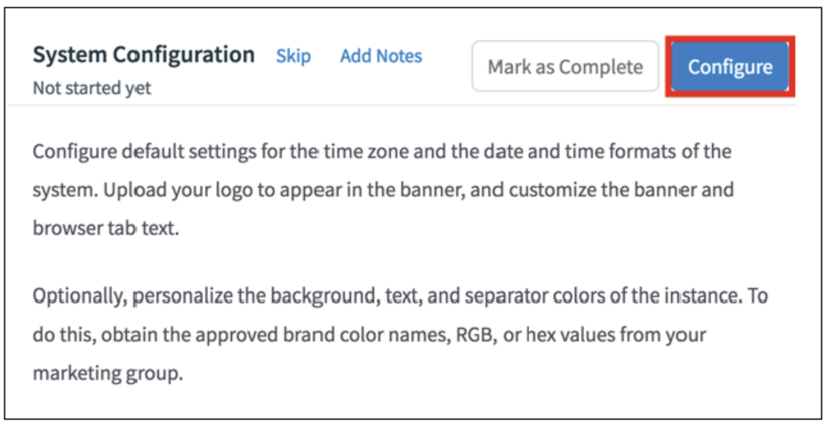


Next, click **Get Started** from the **Company** section:



The first task to complete is **System Configuration**.

3. Read the summary text, for what to expect, then click the **Configure** button:



4. Fill out the fields as follows:

   Page header caption: **Cloud Dimensions <YourFirstName YourLastName>**

NOTE: *Replace* ***<YourFirstName YourLastName>*** *with your own name (for example, Cloud Dimensions* ***Joe Employee****).*

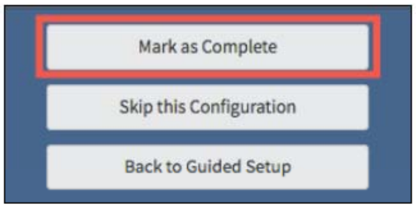
Browser tab title: **Cloud Dimensions ServiceNow**
Banner image for UI16: **[CloudDimensions-CD-Logo.png]**
Header background color: **#2b3a5a**
Header divider stripe color: **#d84833**
Navigation header/footer and navigation background expanded items: **#486a93**
Navigation selected tab background color: **#ffffff**
Background for navigator and sidebars: **#536171**
Currently selected Navigation tab icon color for UI16: **#000000**

***NOTE**: As you enter values, especially for color fields, changes may display in real time.*

5. When finished, click the **Save** button.

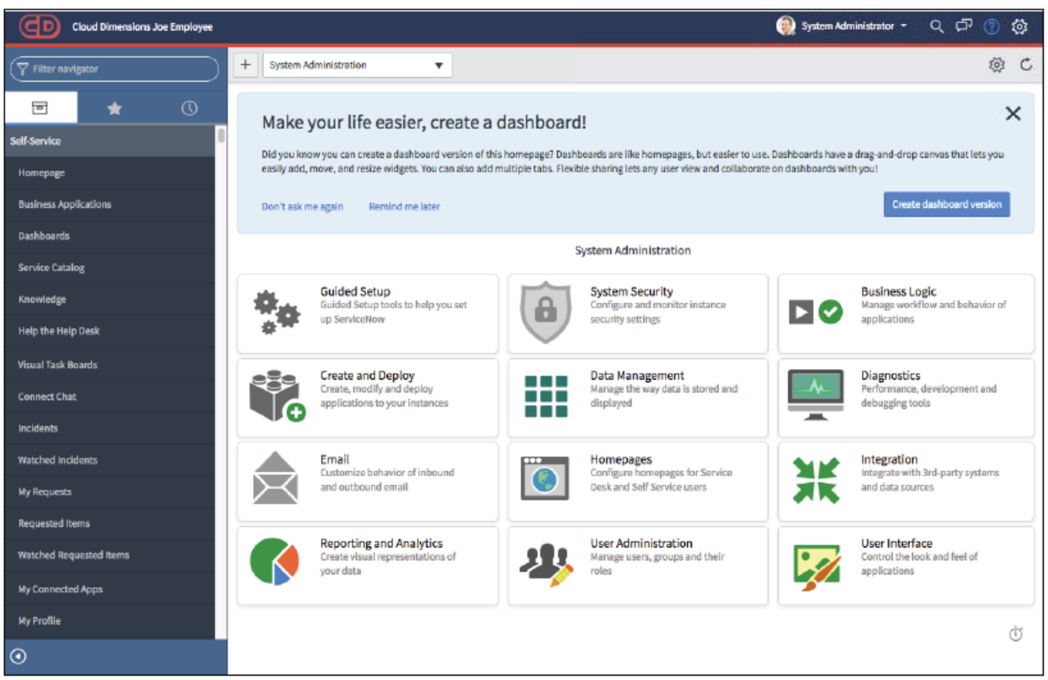
6. Refresh your browser to ensure the changes take full effect.

7. From the **Help** sidebar, click **Mark as Complete** for this Guided Setup task:



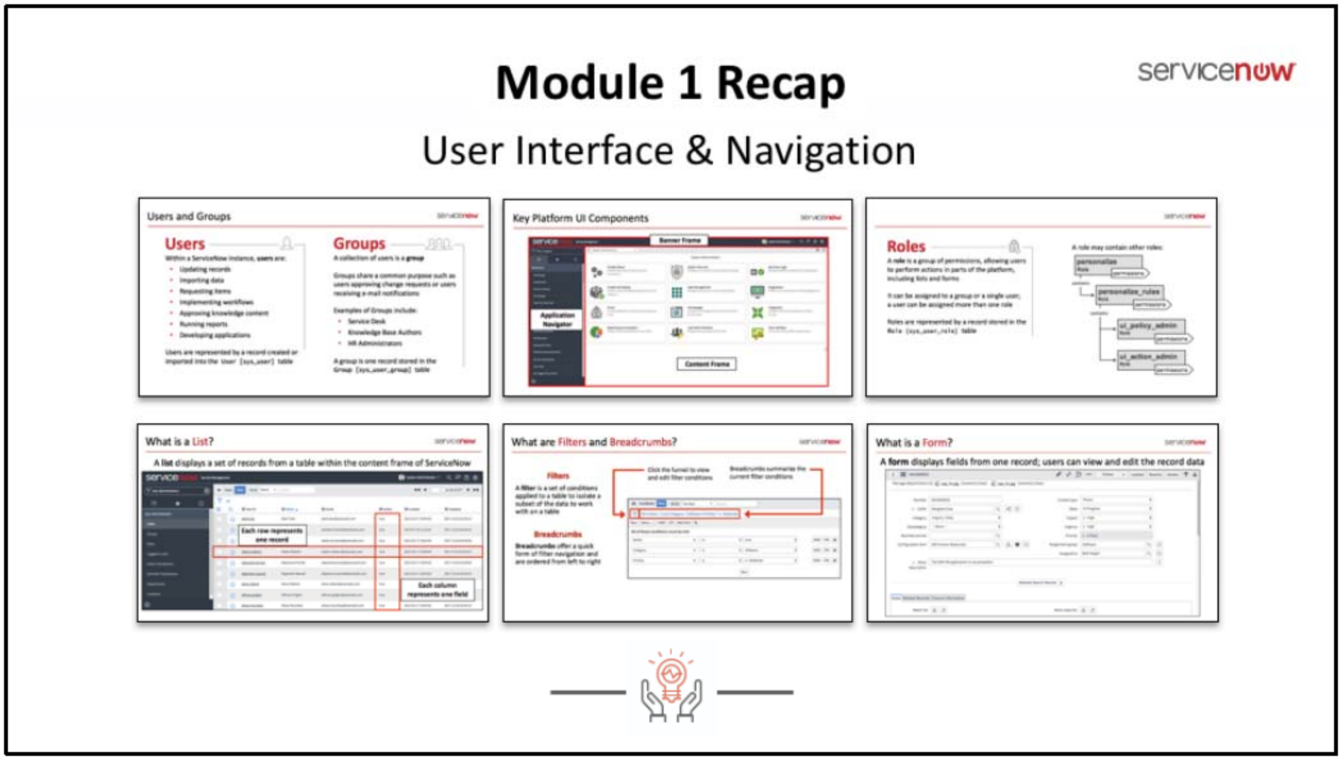
LAB VERIFICATION

Cloud Dimensions System Theme



***NOTE**: For demonstration purposes, as well as clarity of these training materials, screen shots in future labs will use the "Cloud Dimensions" system theme as defined in this lab.*

Congratulations, you have completed the Branding lab!



For these selected topics, discuss:

Why would you use these capabilities?

When would you use these capabilities?

How often would you use these capabilities?