knowledge15®
April 19–24, 2015 • Mandalay Bay • Las Vegas, NV

Lab Guide

Mobile:

Any App, Anywhere, Anytime

Guerric Sloan & Jerry Jones

Default Login / Password:

admin / Knowledge15

itil / Knowledge15

employee / Knowledge15

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Lab Goal

This lab familiarizes users with the ServiceNow Mobile Web UI, which has been available since Dublin. It also explains how to configure the Mobile Web UI numerous ways.

Be sure to stick around after you have completed this lab for a 30 minutes panel on the future of ServiceNow Mobile. It's your chance to let us know what features your users are requesting the most.

Lab 1.1 Getting Started

Open the Mobile UI on Your Phone

1. Using your iPhone or Android phone, navigate to your ServiceNow instance using the URL provided to you.

2. Log on with the provided credentials.

3. The homepage appears.

Open the Mobile UI on your desktop (optional)

1. If you are using a desktop browser for this lab, such as Google Chrome, Apple Safari, or Mozilla Firefox, you can navigate to the mobile interface with this URL: https://**LabPrefix###**.lab.service-now.com/$m.do

   Note: To maintain separate desktop and mobile interface sessions, you should open your mobile UI session in a private browsing session.

How to start private browsing:

- Google Chrome:
  - https://support.google.com/chrome/answer/95464?hl=en
- Apple Safari:
  - https://support.apple.com/kb/PH19216?locale=en_US
- Mozilla Firefox:
  - https://support.mozilla.org/en-US/kb/private-browsing-control-what-info-firefox-saves

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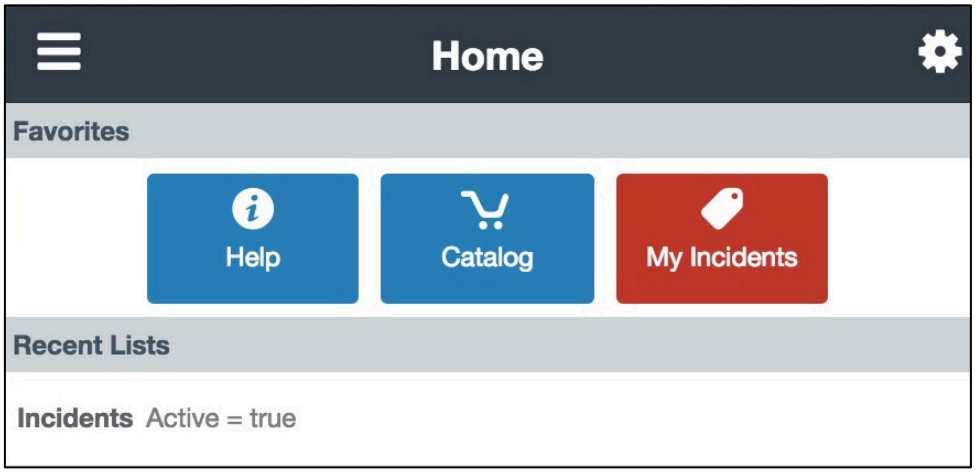
Lab Goal

This lab explores the range of features available to end users in the Mobile Web UI. This lab explores the capabilities; the next lab explains how to customize them.

Lab 2.1
User Features

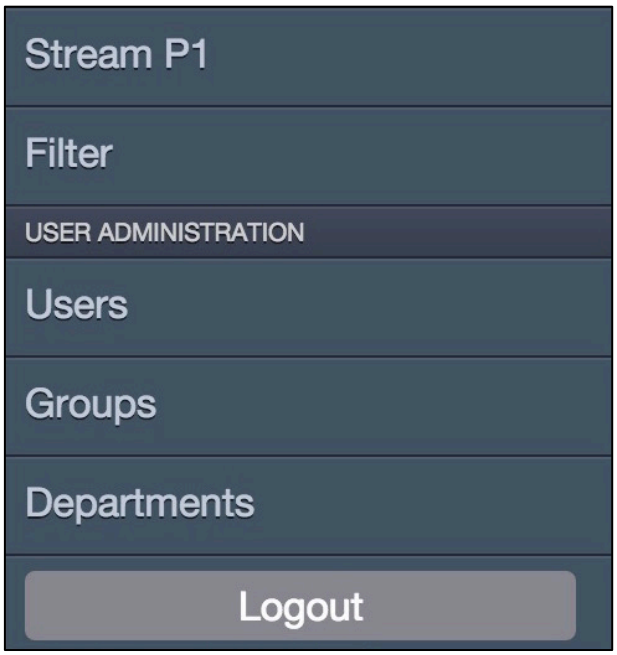
Move Around with Navigation and Lists

1. Open the mobile navigator by tapping **menu** .

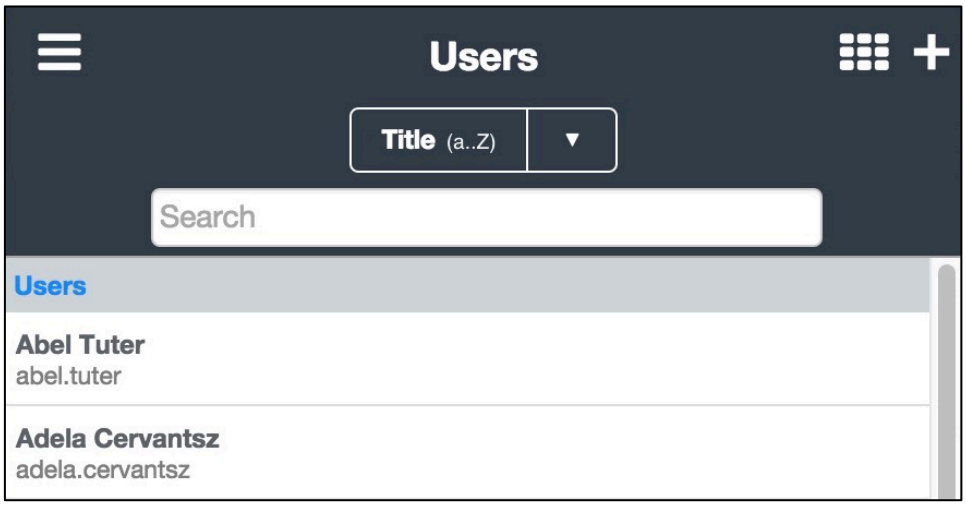


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2. Scroll to the bottom of the navigator menu and select **Users**.



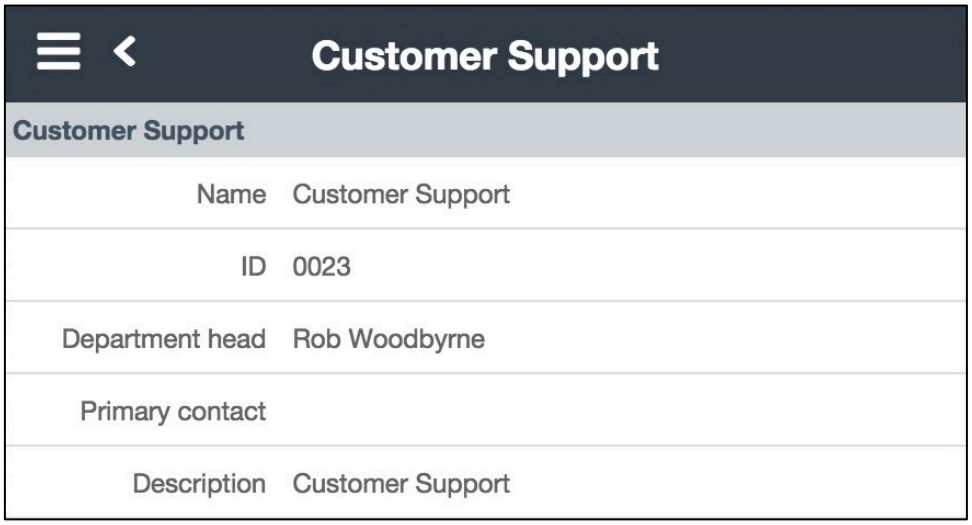
3. Tap the **sort**  and tap **Updated** to change the list sort field.



4. Select **Ashley Leonesio** from the list to view the user record.

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5. Tap **disclosure**  on the **Department** field to view details about the department.



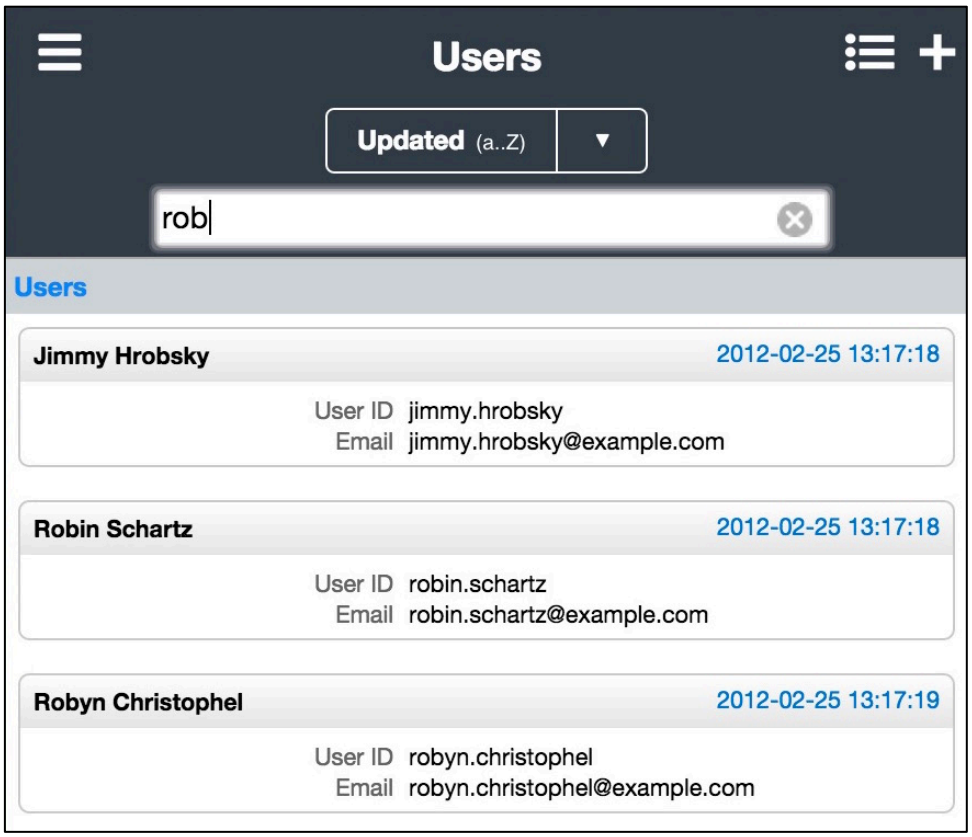
6. Tap **back**  once to return to the user record.

7. Tap **back**  once again to return to the list.

8. Tap **card**  in the list header to toggle to the card view.

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9. Search for **Rob** to filter the list results.



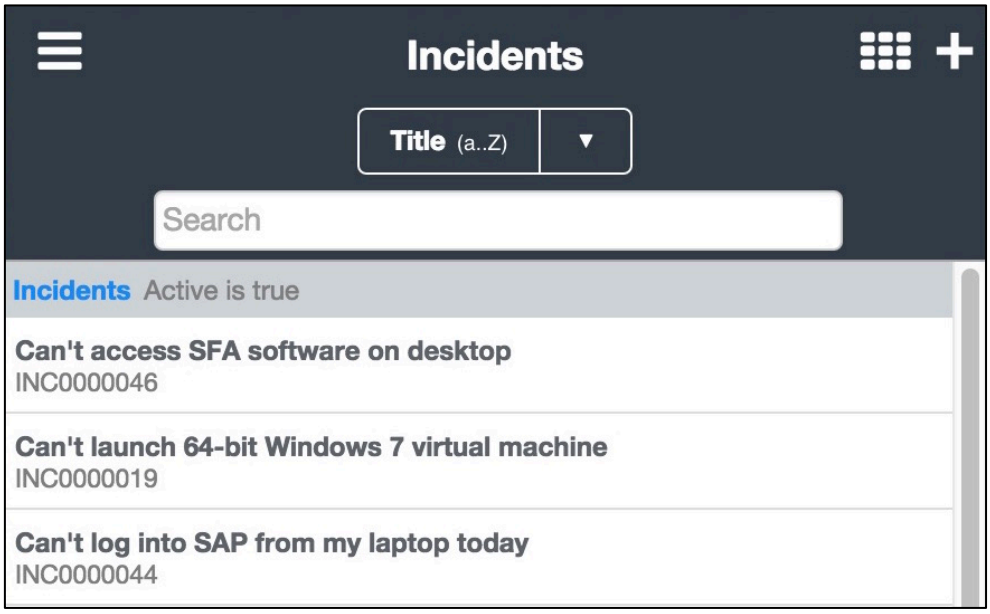
10. Tap **list**  in the list header to toggle back to the list view.

We have covered basic list actions, next we look at how to filter lists and add favorites.

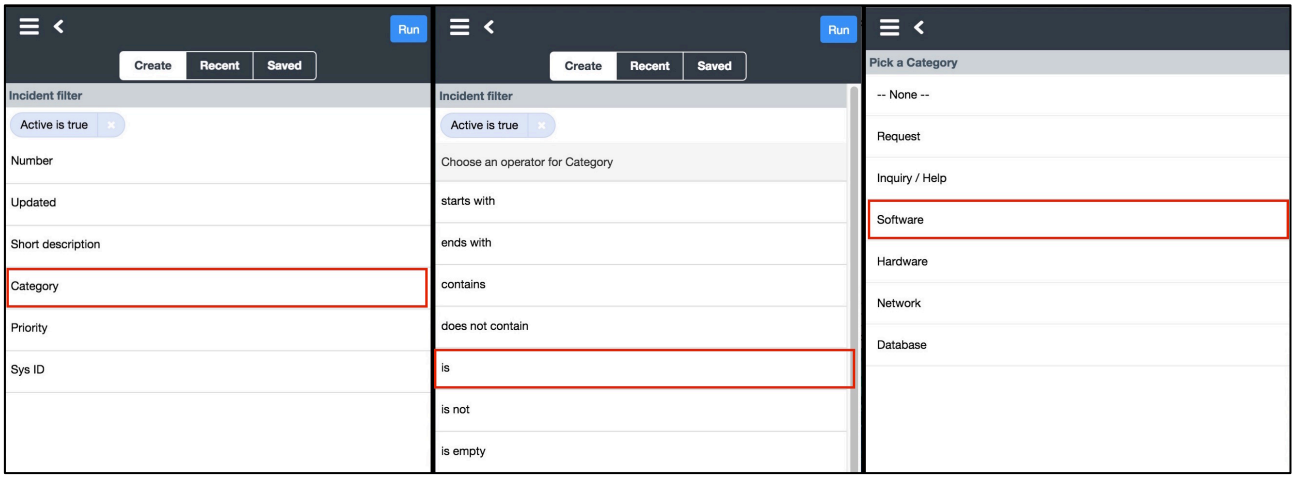
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Filter Lists and Add Favorites

1. Tap the **menu**  to open the mobile navigator.
2. Tap **Incident > Active** in the navigator.
3. Tap the gray header with the blue word **Incidents** to activate list filtering**.**

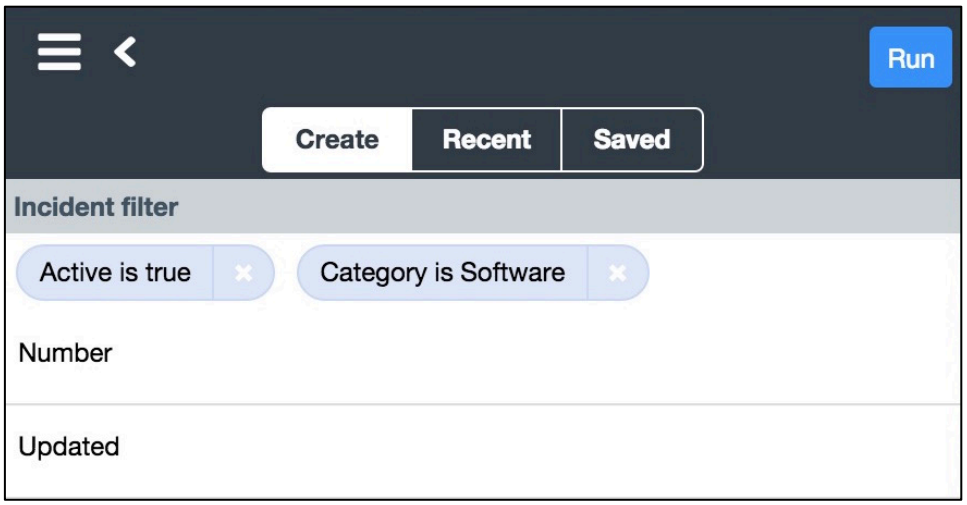


4. Tap **Category > is > Software**.



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5. Tap **Run** to filter the list of incidents.



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6. Press and hold **home**  to add this filter to your list of favorites.

   Note: Desktop users, right-click **home** to display the favorites dialog.



7. Fill out the displayed form to create your favorite:

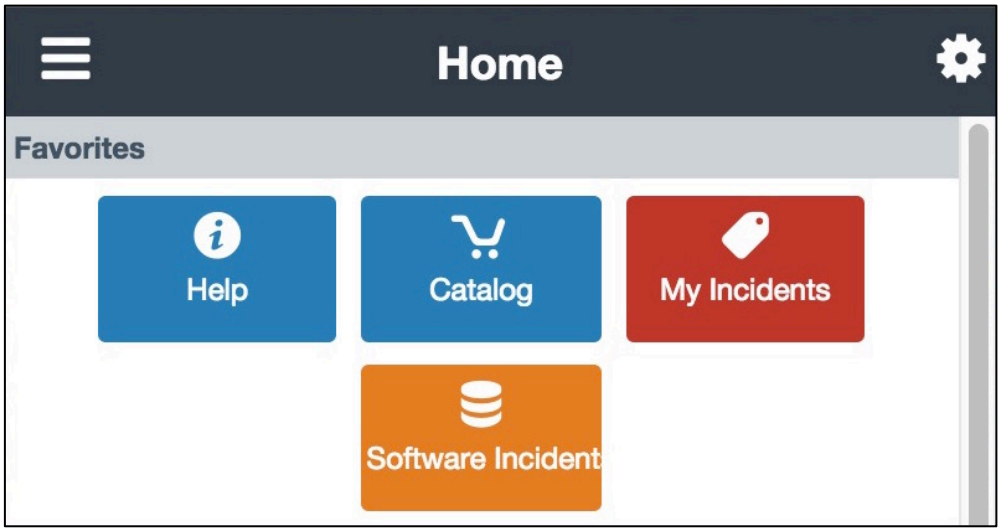
   Enter a name for the favorite: **Software Incidents**
   Select a color for the favorite: <**Your choice**>
   Choose an icon for the favorite: <**Your choice**>

8. Tap **Save**.

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9. Tap **home**  to return to the mobile homepage.

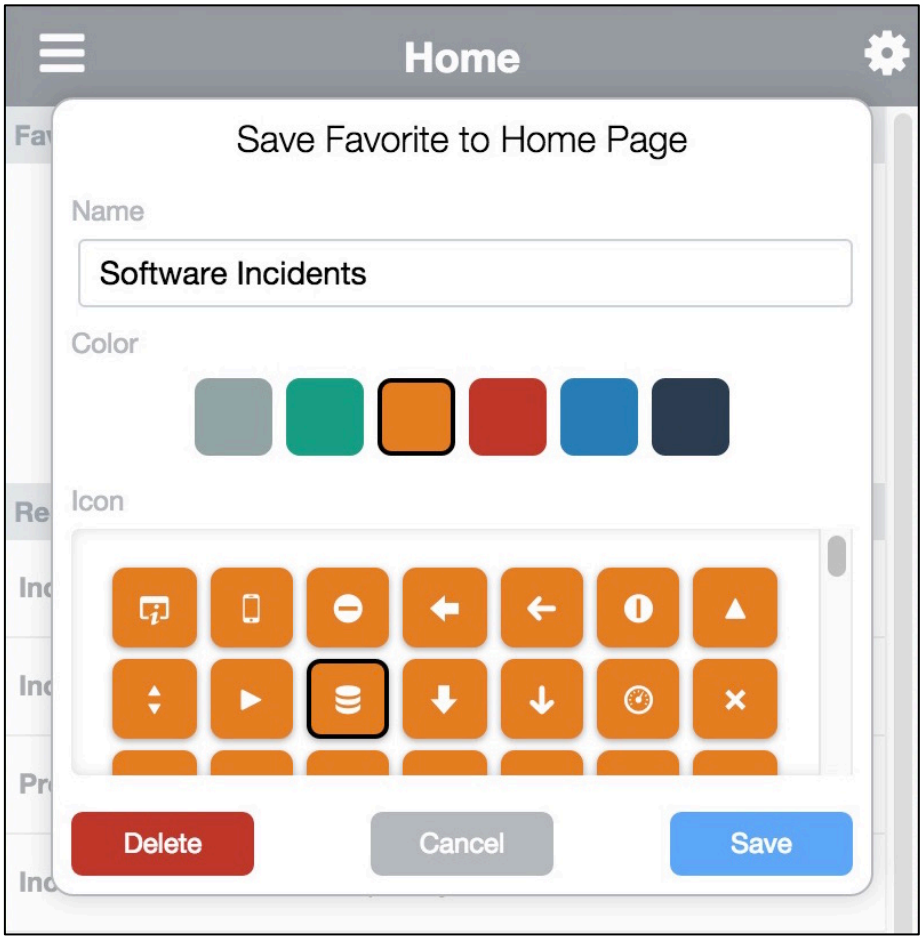
10. Notice the list filter has been added to the homepage as a favorite.



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11. To modify the favorite, press and hold on the favorite. This action opens the favorite dialog with an additional option to delete the favorite.

    Note: Desktop users, right-click the favorite to open the dialog.



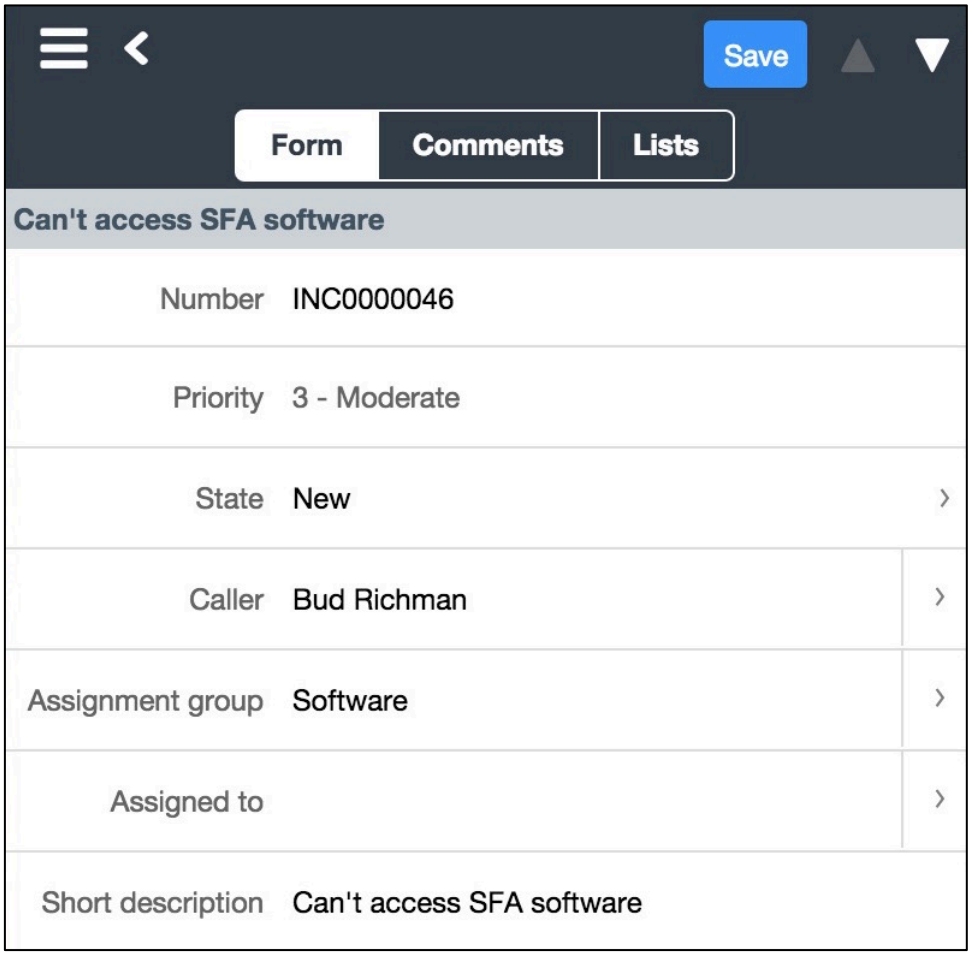
12. Tap **Cancel** to close the dialog.

That wraps up the list filtering overview. Next we interact with forms.

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Interact with Record Forms

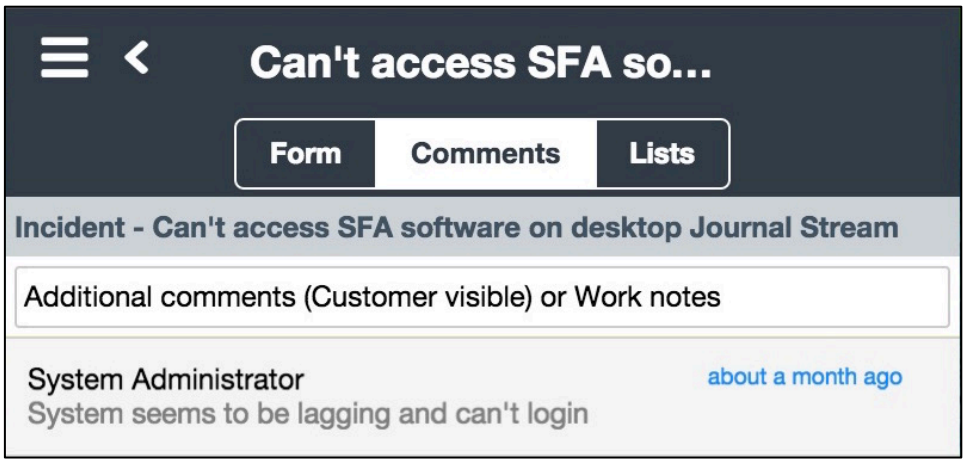
1. Tap **menu**  to open the mobile navigator.
2. Tap **Incidents > Active**.
3. Tap the incident with description: **Can't access SFA software**.



4. Tap the **Short Description** textbox to focus it and then change the value.
5. Type text: **Can't access SFA software on desktop**
6. Tap **Save** to update the record.

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7. Tap **Comments** in the header to view the comment stream.

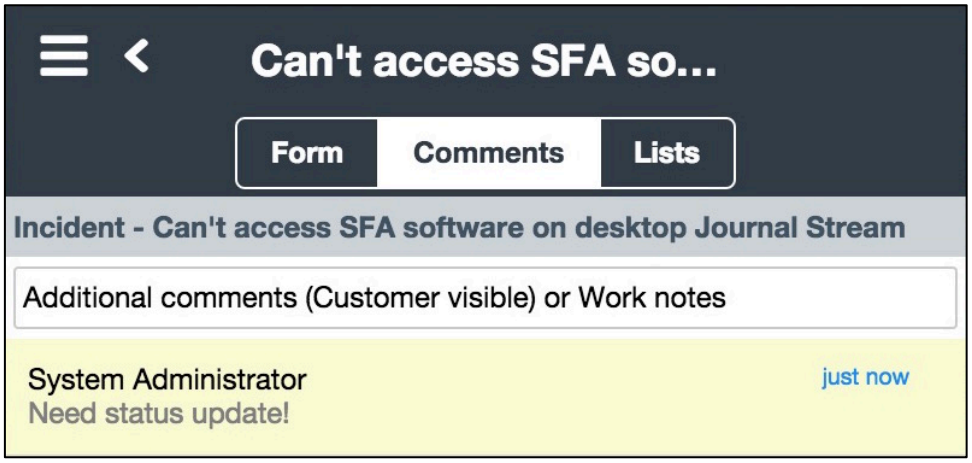


8. Tap the **Additional comments** textbox to focus it. Enter a work note.

9. Type text: **Need status update!**

10. Tap **Work Note** 

to save the new work note.



11. Tap **Lists** to view related lists.

12. Tap **Form** to return to the incident form.

Next we see how attachments are created and accessed on records.

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View Record Attachments

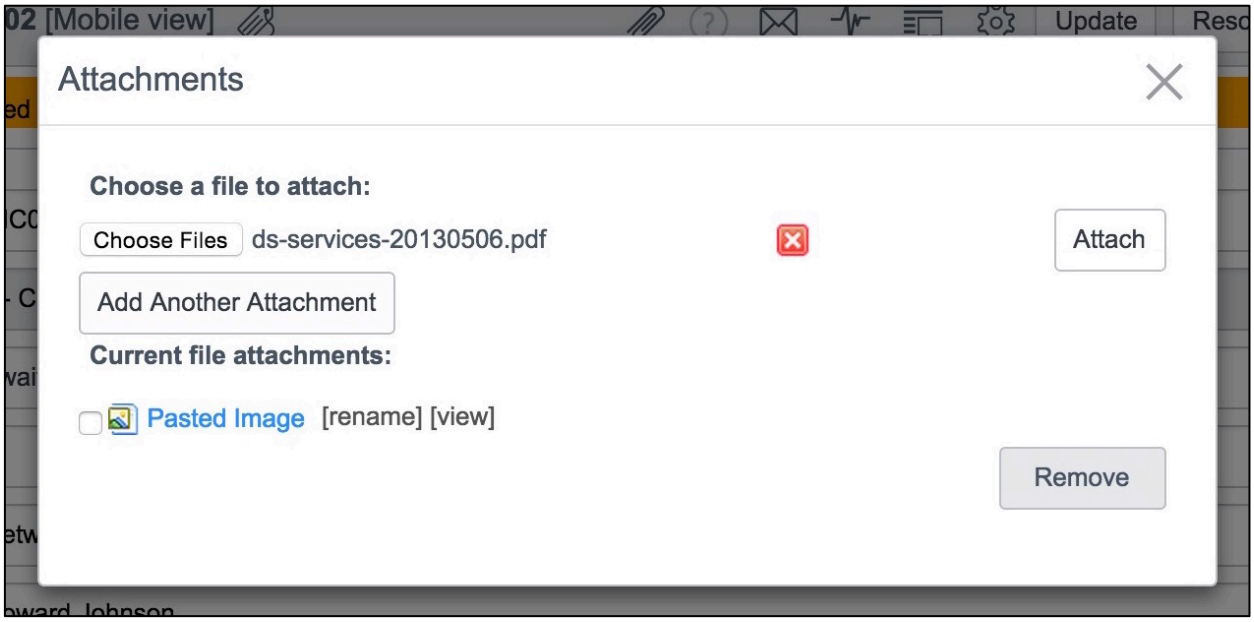
1. From a desktop browser, navigate to **Incident > Open**.
2. Select the incident with description **Can't access SFA software on desktop** from the previous exercise.

   Note: The incident number is **INC0000046**

3. Click **Attach**  in the form header.
4. Attach a PDF document to the incident.

   Note: If you need a PDF to attach, use this whitepaper from ServiceNow:

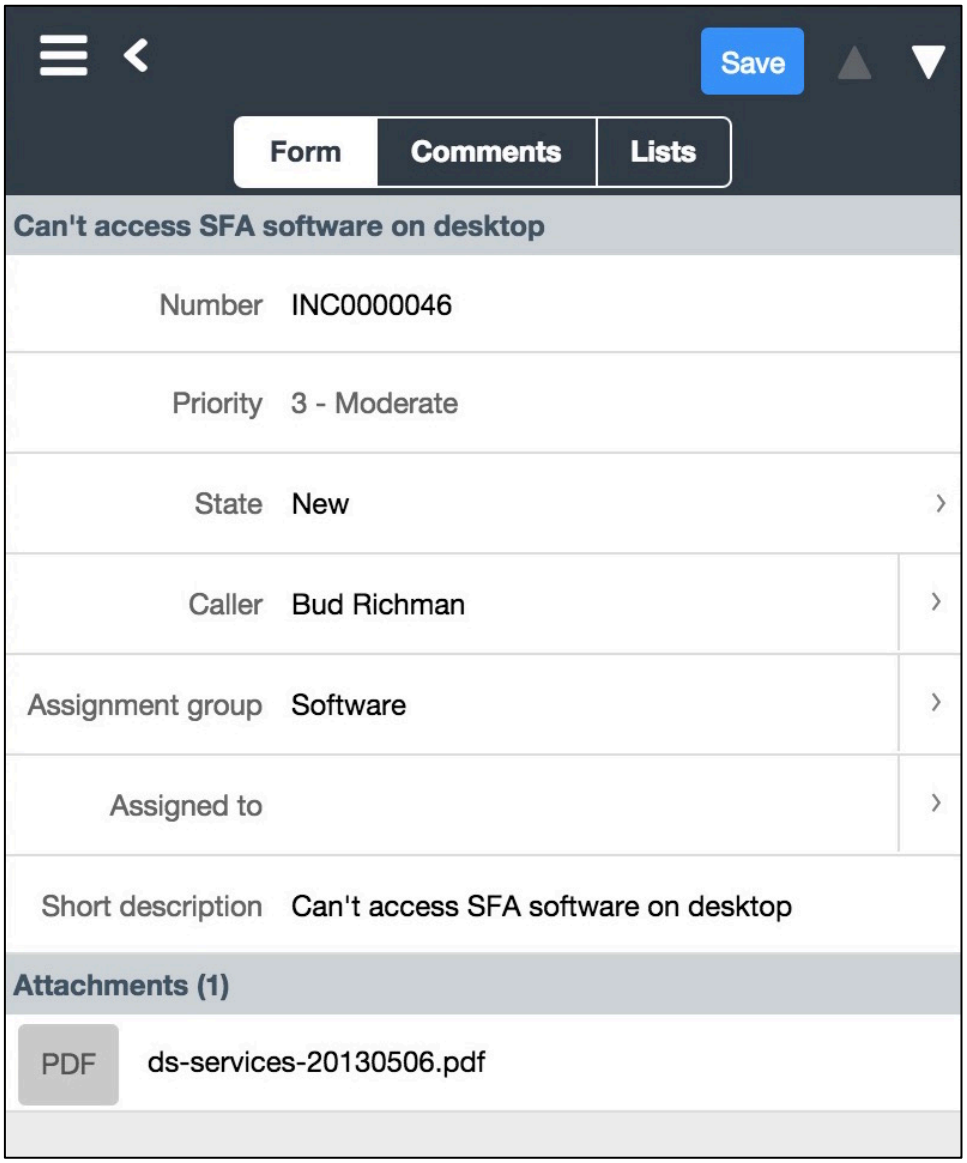
   http://www.servicenow.com/content/dam/servicenow/documents/datasheets/ds-services-20130506.pdf



5. Open the mobile interface and navigate to **Incident > Active > INC0000046**.

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6. Scroll to the bottom of the incident and notice the list of files displayed. Select the PDF file to open it on your mobile device.

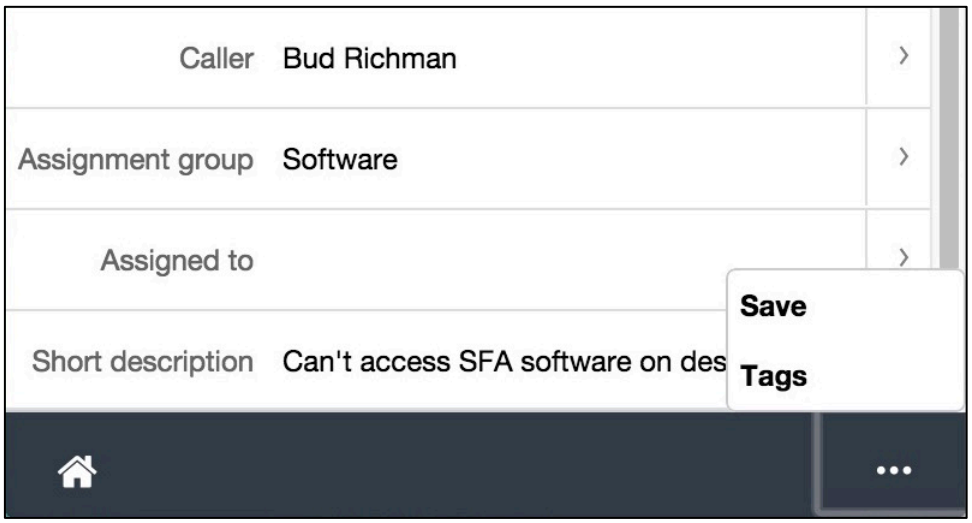


Next we explore how to tag records.

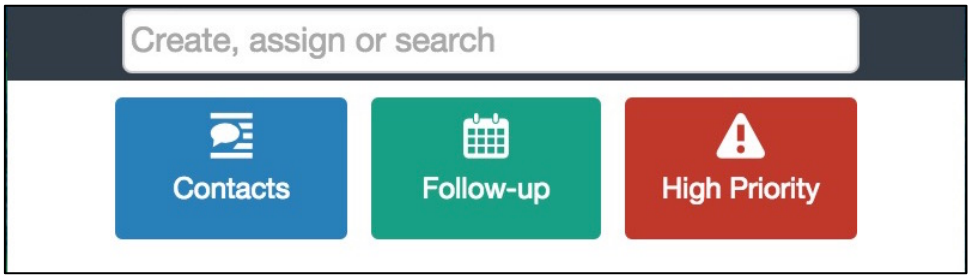
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Tag Records on Forms

1. If you are not viewing an incident already, navigate to **Incident > Active** and open the first record listed.
2. Tap **overflow**  to display a list of additional options.
3. Tap **Tags**.



4. Tap the **Search Textbox** to create a new tag.

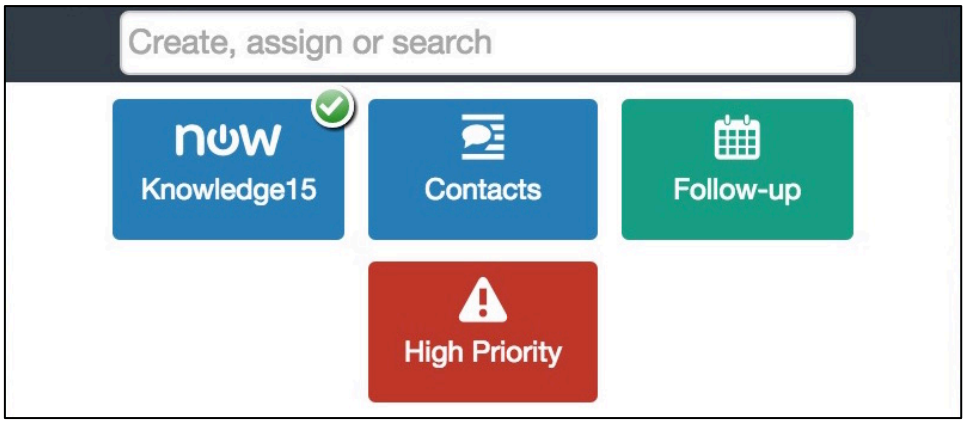


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5. Type text: **Knowledge15**

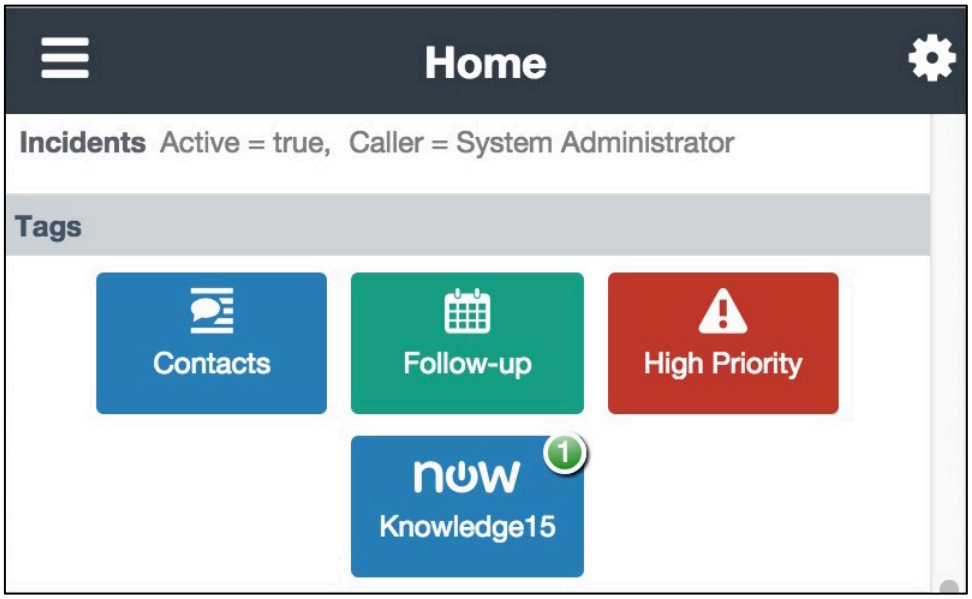


6. Tap **enter** on the keyboard to accept the tag name. The edit tag dialog appears.
7. Select a **color** and **icon** for the tag.
8. Tap **Save** and notice the new tag has a **green** check mark indicating it is selected.



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9. Tap **home**  to return to the mobile homepage. Notice the new tag has been added to the homepage.



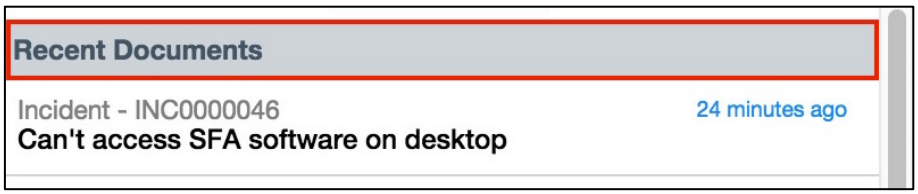
10. Tap the **Knowledge15** tag to view a list of tagged incidents.

Next we will explore recent activity.

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View Recent Activity

1. If you are not on the mobile homepage, tap **home**  to return to the mobile homepage.
2. Tap the **Recent Documents** header to get a list of recently created or updated items.

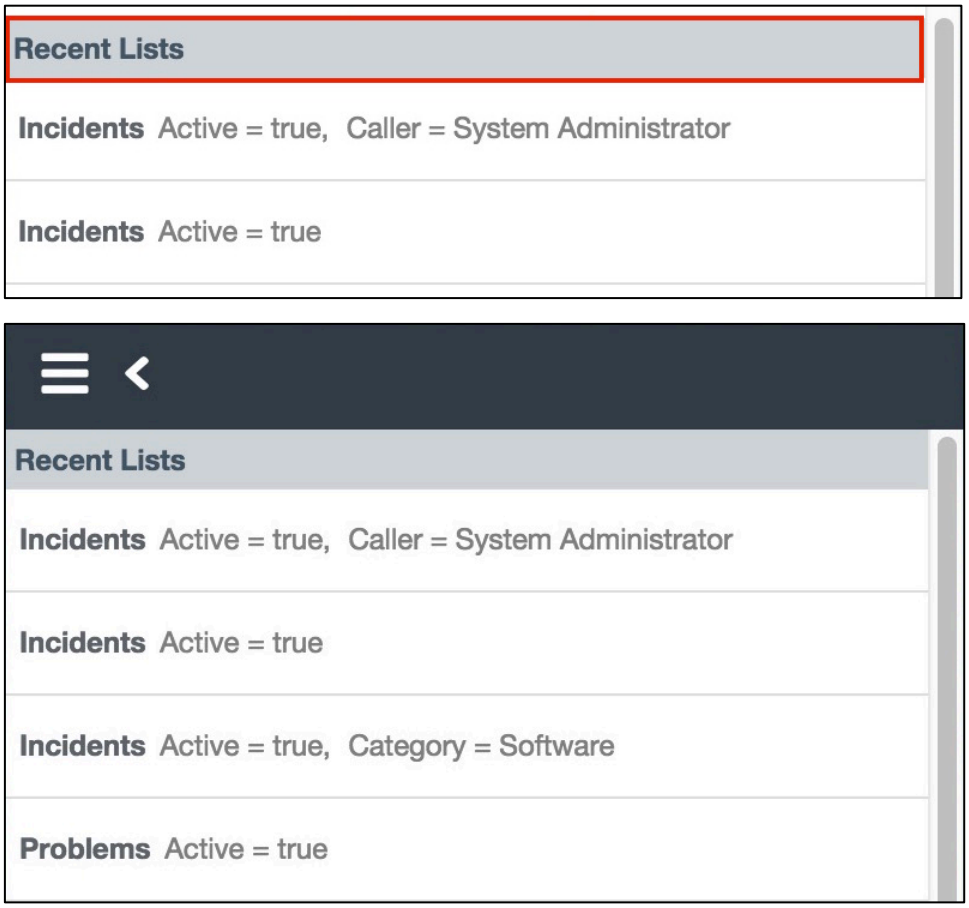




3. Tap **back**  once to return to the mobile homepage.

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4. Tap the **Recent Lists** header to get a list of recently view lists.



Next we examine the different configuration points for the mobile interface.

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Lab Goal

This lab explores the range of features available to administrators in the Mobile Web UI.

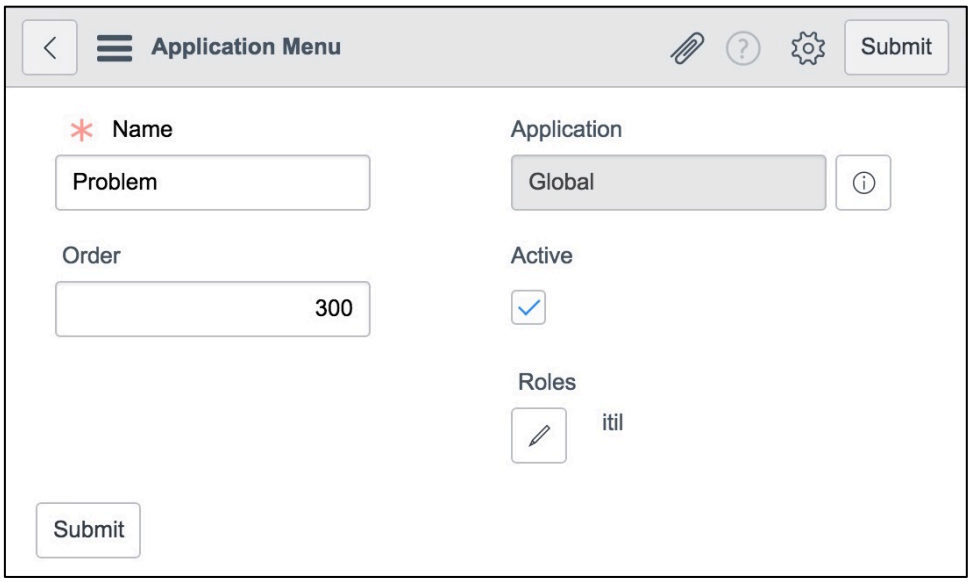
Lab 3.1 Admin Features

Add New Navigator Apps

Adding other applications to the mobile experience allows users to take advantage of the additional tools. In this example, we will add **Problem Management** to the mobile system.

1. From a desktop browser, go to **System Mobile UI > Navigator Apps**.
2. Click **New**.
3. Create an application with the following:

   Name: **Problem**
   Order: **300**
   Roles: **itil**



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4. Click **Submit**.

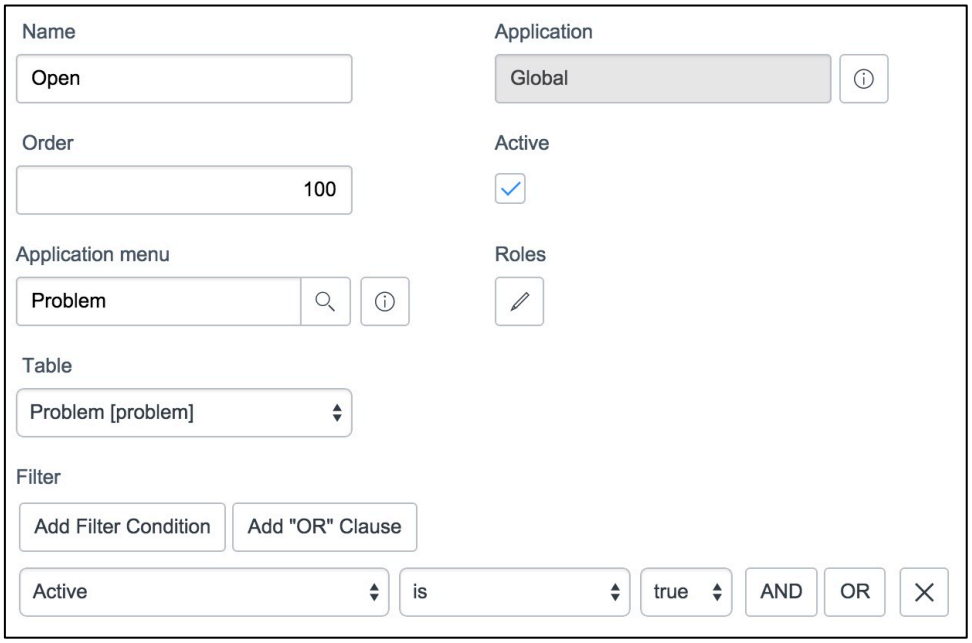
5. In the resulting list, select **Problem**.

6. Click **New** under the **Modules** list.



7. Create a module with the following:

   Name: **Open**
   Order: **100**
   Table: **Problem**
   Filter: **Active is true**



8. Click **Submit**.

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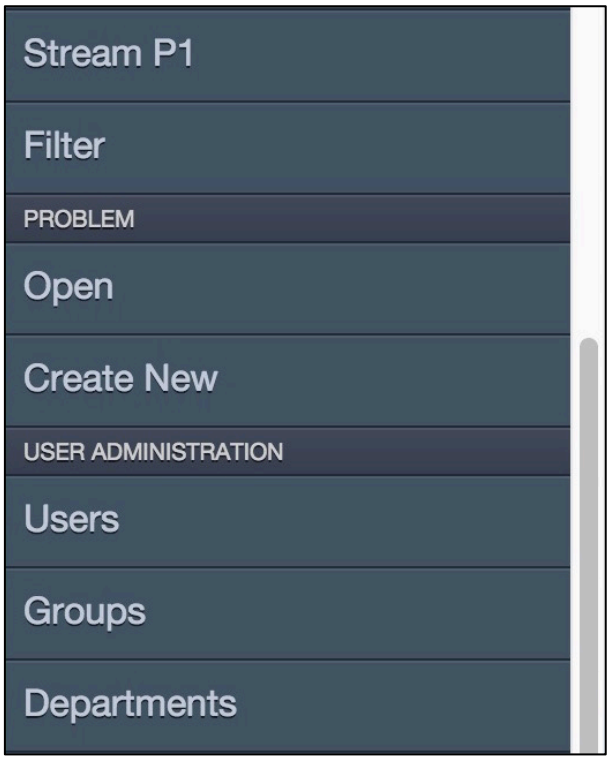
9. Click **New** to create another module:

   Name: **Create New**
   Order: **200**
   Table: **Problem**
   Path: **/form/problem/-1**

   Note: The path is composed of 3 parts: view type / table / sys ID

10. Click **Submit**.

11. Visit the mobile interface in another private browsing window or on your mobile device. You should see the new Application: **Problem** as well as new modules: **Open** and **Create New**.

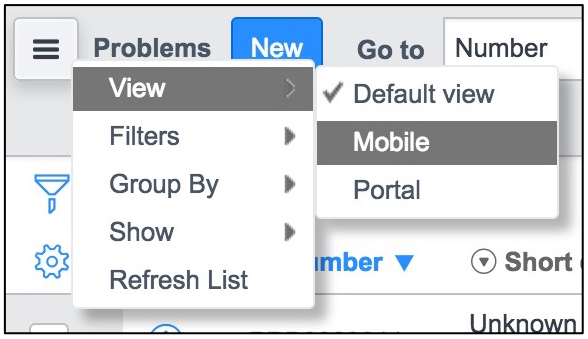


Next we explore customizing layouts for lists and forms.

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Configure List Layouts

1. From a desktop browser, navigate to **Problem > Open**.
2. Click **menu**  to display the context menu.
3. Select **View > Mobile**.



4. Notice the columns for the list have changed to: **Number, State, Project Name,** & **Escalation**.

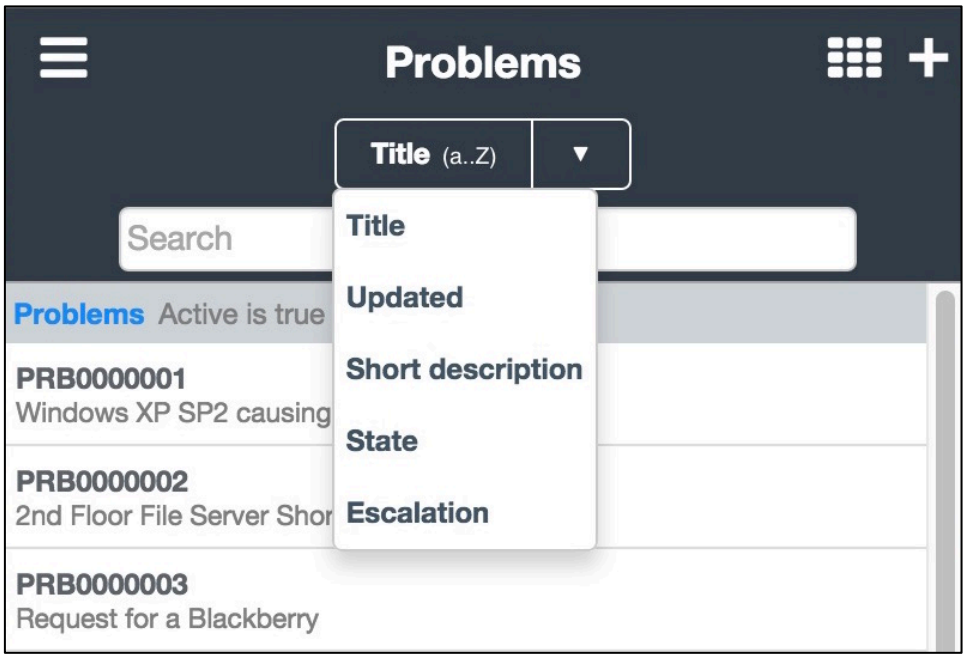


5. Open the mobile interface and navigate to **Problem > Active**.

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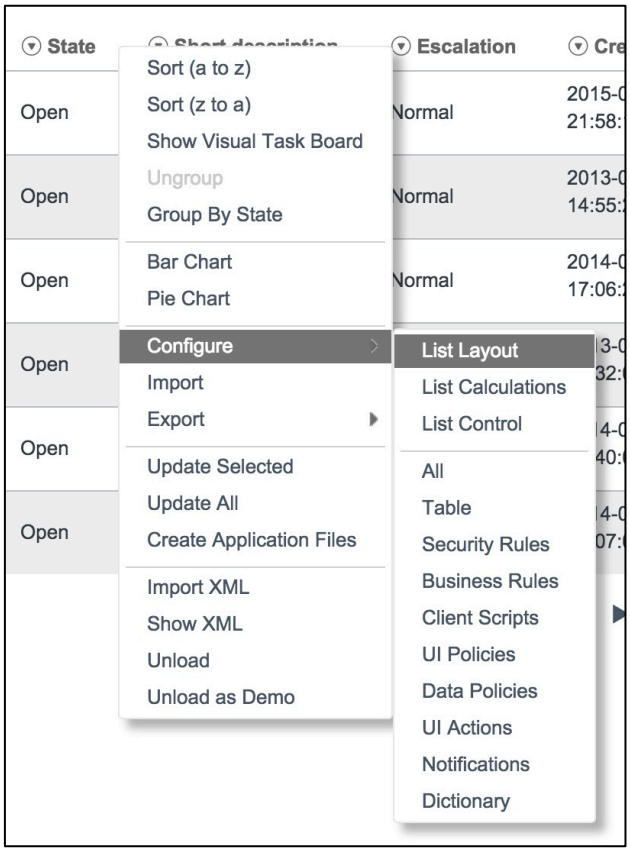
6. Notice the fields that show on the list. Also notice the columns that you can sort on. These fields are chosen from the **Mobile** list layout.

   If you change to **Card View**, the fields that show on the card are also driven from the **Mobile** list layout.



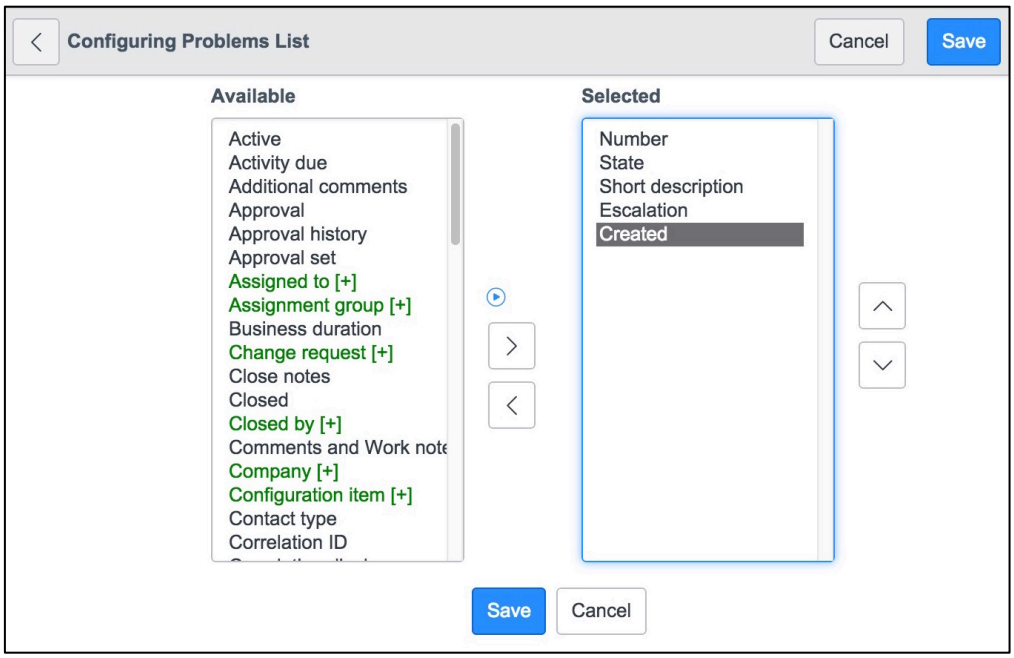
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7. From the desktop browser, right click on the list header to open the context menu and then select **Configure > List Layout**.



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8. Add **Created** to the selected fields for the **Problem List**.



9. Click **Save**.

10. Refresh the list view on the mobile device by tapping **Home** and then navigating to **Problem > Open**.

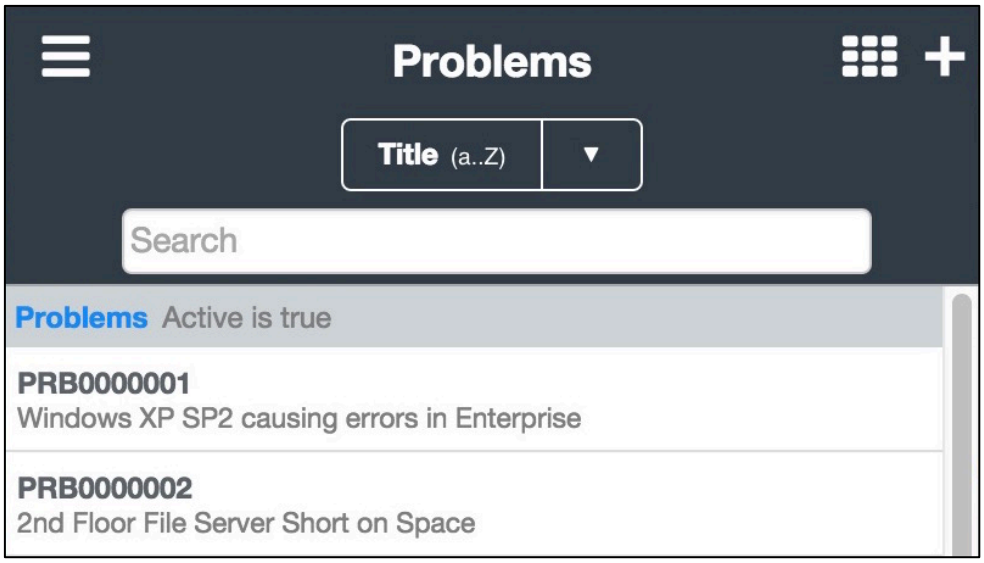
11. Notice the **Created** field is added to the list of sort fields and is also displayed on the card.

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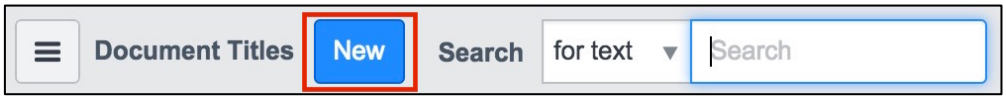
Configure List Titles (Table Titles)

The **Table Titles** configuration enables administrators to customize the primary display values on lists.

For example, **Problem** records may not be easy to read in a mobile list. Table titles are available for administrators to provide an alternate display value on mobile lists.



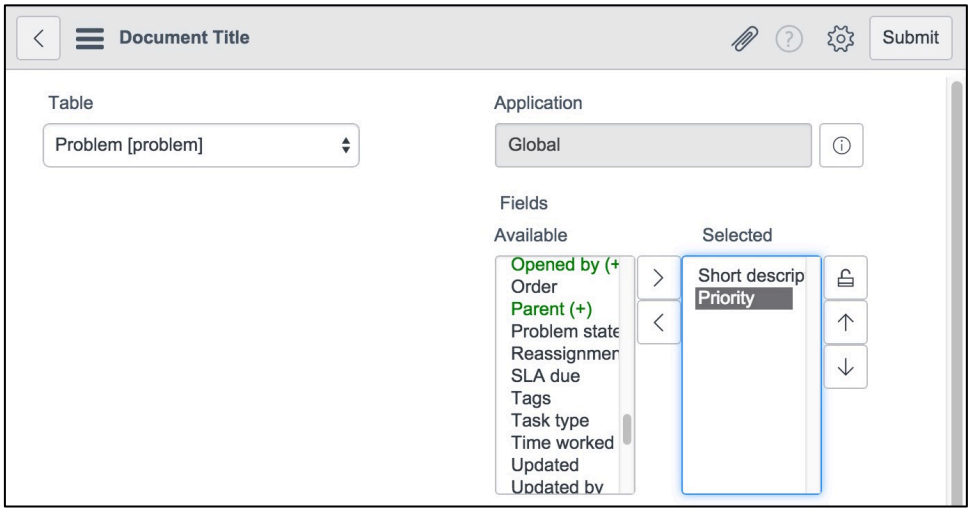
1. From a desktop browser, go to **System Mobile UI > Table Titles**
2. Click **New**.



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3. Create a table title with the following values:

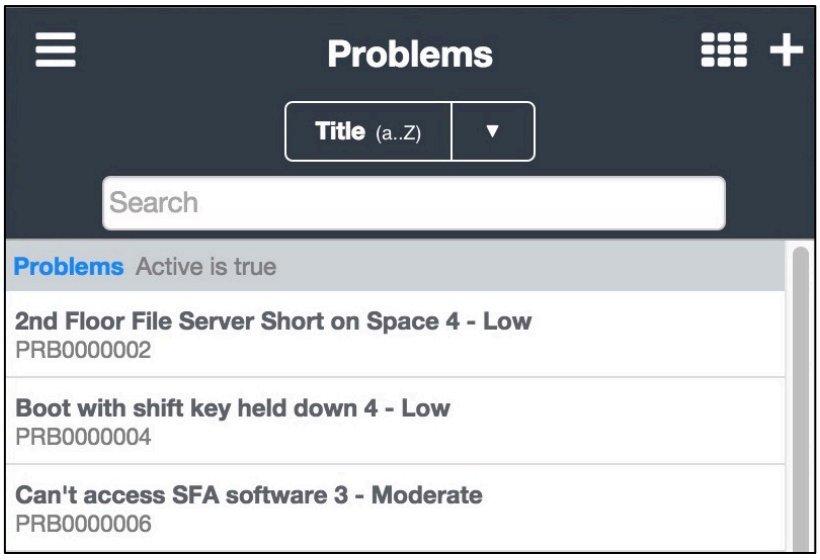
   Table: **Problem**
   Fields: **Short Description, Priority**



4. Click **Submit**.

5. Go to the mobile interface and navigate to **Problem > Open**.

6. Note the new table titles displayed in the list.



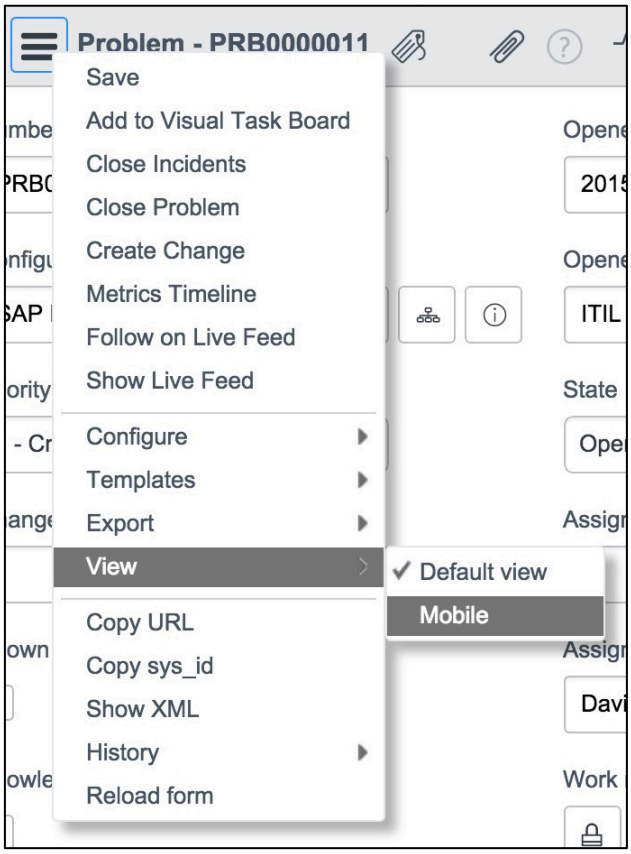
Next we configure form layouts.

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Configure Form Layouts

1. From a desktop browser, navigate to **Problem > Open**.
2. Select the first problem in the list.
3. Click **menu**  to display the context menu.
4. Select **View > Mobile**.

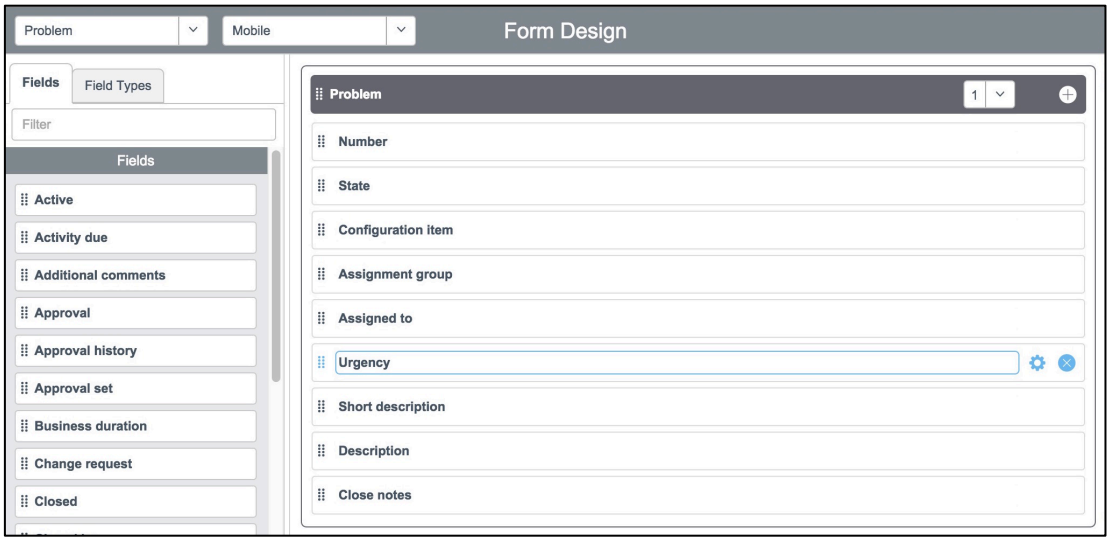
   Note: If the **Mobile** form view is not available, the **Default** form view is used.



5. Click **menu**  once again and select **Configure > Form Design**.

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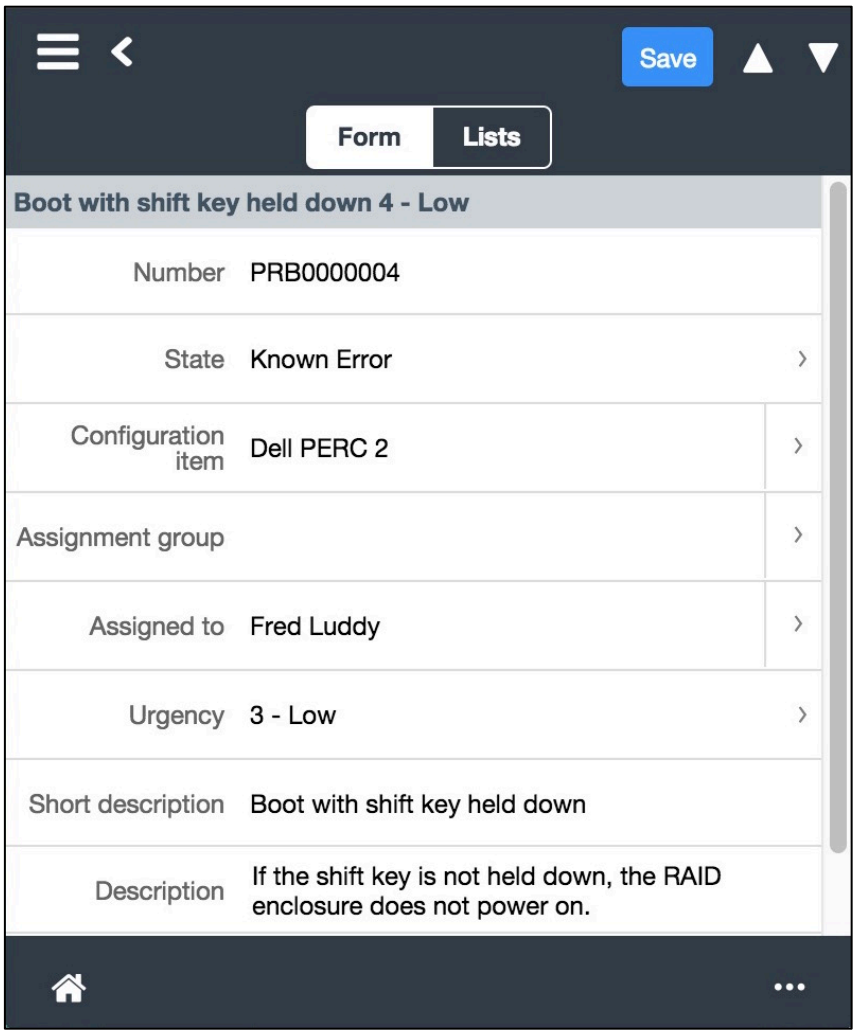
6. Drag the **Urgency** field from the left pane into the form design.



7. Click **Save**.

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8. Go to a **Problem** record in the mobile interface.



Notice the layout features:

Some fields display differently on the mobile interface.
There is no idea of 2 columns layouts. Everything is compacted into 1 column.
By default, journal fields are hidden and displayed on the **Comments** tab.

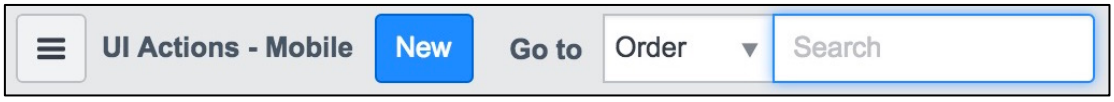
Next we configure UI actions.

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Configure UI Actions

This exercise creates a new **Copy** UI Action that can copy an incident. The new action can reduce the amount of manual input required by using an existing incident as a starting point.

1. From a desktop browser, go to **System Mobile UI > UI Actions – Mobile**.
2. Click **New**.

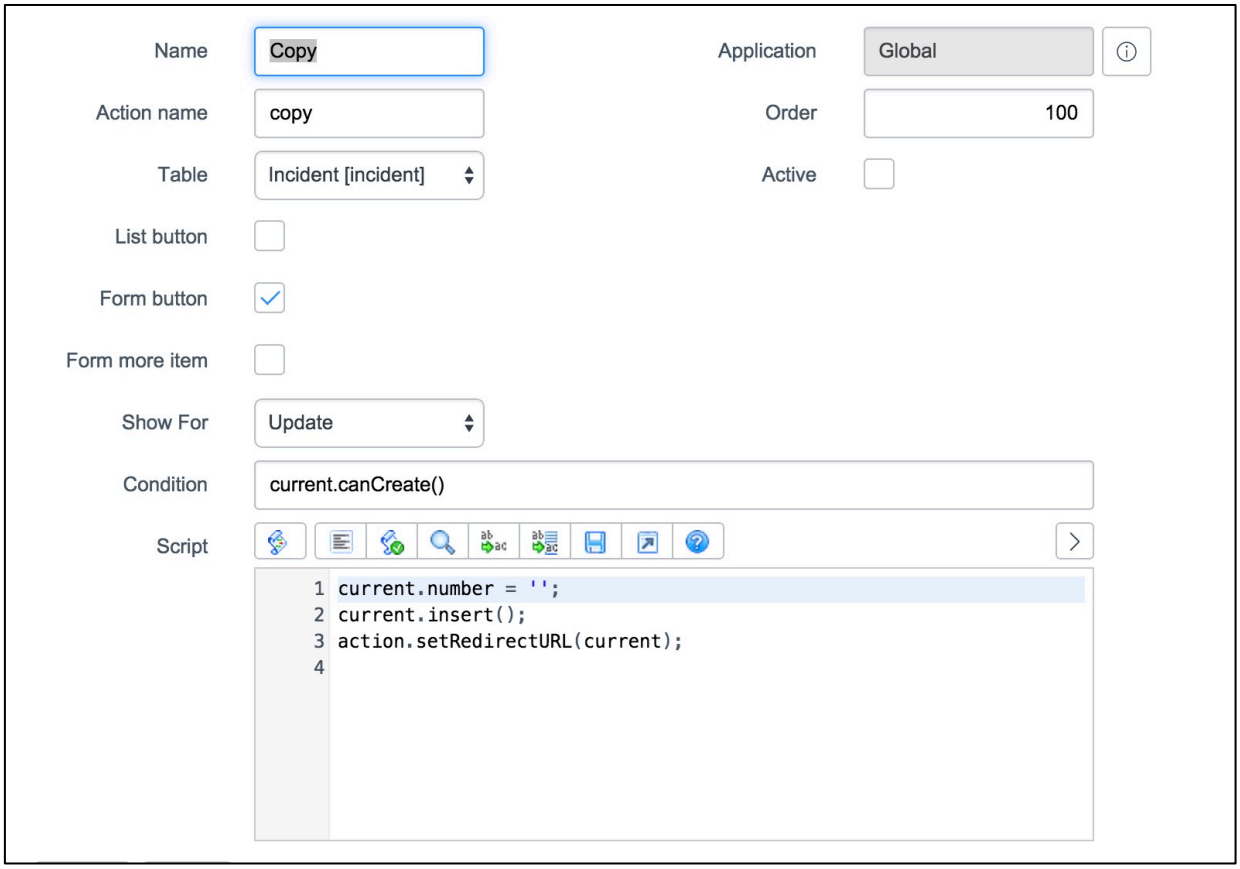


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3. Create a UI Action with the following values:

   Name: **Copy**
   Action name: **copy**
   Table: **Incident**
   Form button: **true**
   Show for: **Update**
   Condition: **current.canCreate()**
   Script:

```
current.number = '';
current.insert();
action.setRedirectURL(current);
```



Note: There are 3 locations available for UI Actions on mobile.

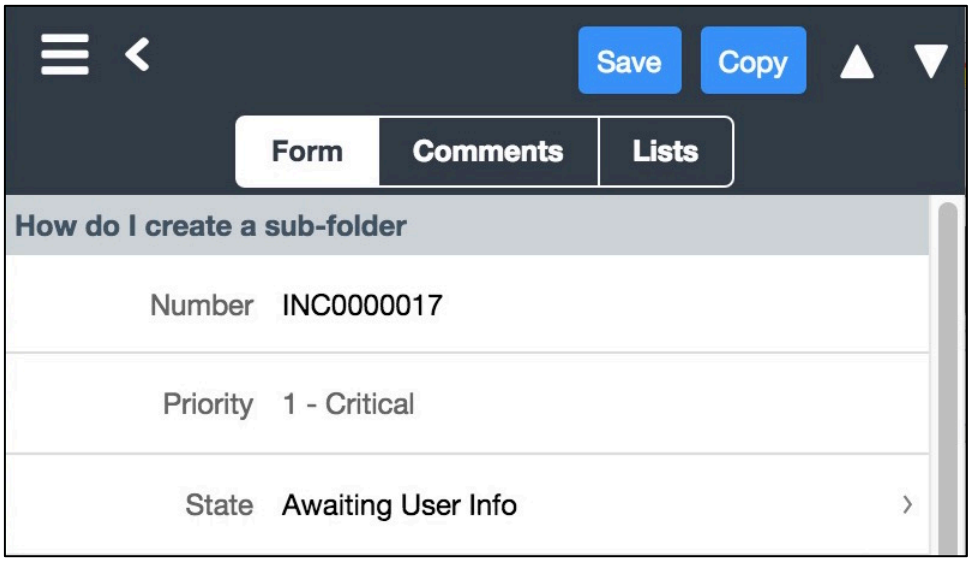
- **List button** will display on lists;
- **Form button** displays at the top of a form;
- **Form more item** displays in the menu at the bottom of the form.

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4. Click **Submit**.

5. Go to the mobile interface and view an incident record: **Incident > Active**.

6. Tap **Copy**.



7. You are now viewing a new incident. Notice that the record number has changed as well as other fields.

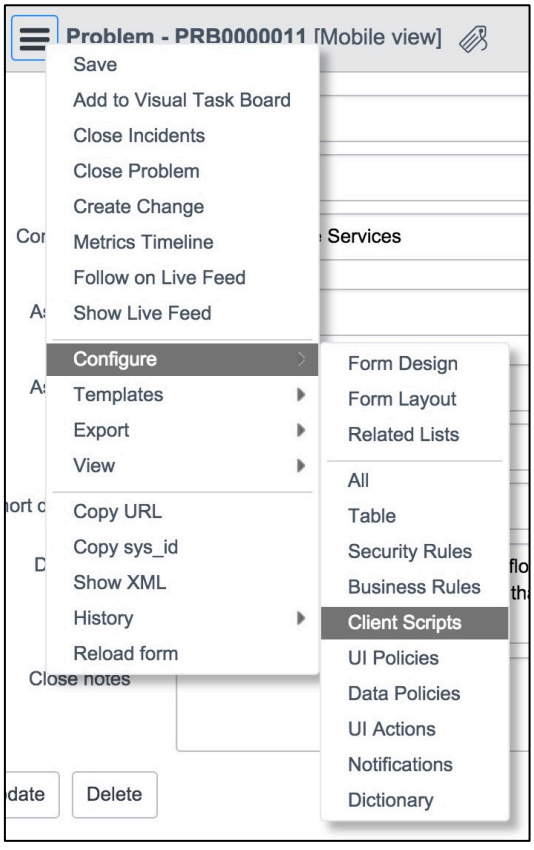
Next we explore Client Scripts for mobile.

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Write a Mobile Client Script

Review the **Problem** module and its records. If you set the **State** to **Pending Change**, change the label of the **Change Request** field to **Pending Request**.

1. In a desktop browser, go to **Problem > Open**.
2. Select any open problem record.
3. Click **menu**  to display the context menu.
4. Select **Configure > Client Scripts**.



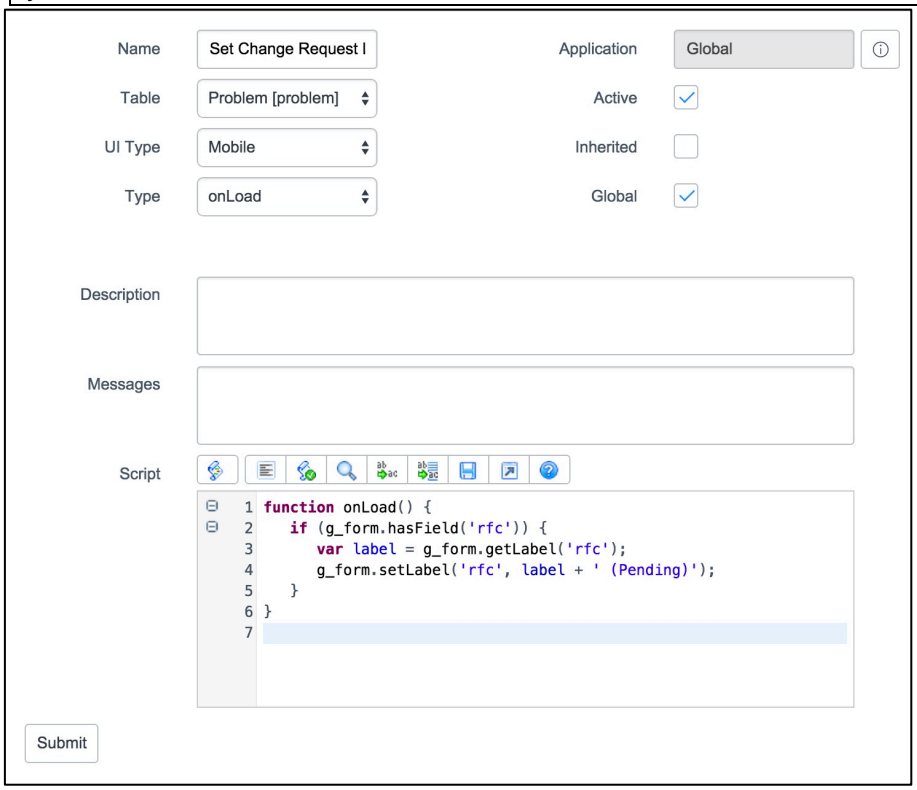
5. Click **New**.

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6. Create a new Client Script with the following values:

   Name: **Set Change Request Label**
   Table: **Problem**
   Type: **onLoad**
   UI Type: **Mobile**
   Script:

```
function onLoad() {
   if (g_form.hasField('rfc')) {
      var label = g_form.getLabel('rfc');
      g_form.setLabel('rfc', label + ' (Pending)');
   }
}
```



7. Click **Submit**.

8. Go to the mobile interface and open a problem record.

9. Note whether or not the label for **Change Request** has changed. If the label did not change, then you might not have the **Change Request** field on your **Mobile** form view. Add that field and try again.

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Complete



Congratulations on completing this lab. Let's review all the functionality we covered:

1. User Features

    - Navigation and Lists
    - Filtering Lists and Adding Favorites
    - Interacting with Record Forms
    - Viewing Record Attachments
    - Tagging Records on Forms
    - Viewing Recent Activity

2. Admin Features

    - Adding New Navigator Apps
    - Configuring List Layouts
    - Configuring List Titles (Table Titles)
    - Configuring Form Layouts
    - Configuring UI Actions
    - Writing a Mobile Client Scripts

Mobile Panel

Now that you've brushed up on your mobile Kung-Fu, we want to get your feedback. We're going to conduct a short panel starting 30 minutes before the end of the lab. Let us know what capabilities your users need from the new mobile experience from ServiceNow.

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Additional Resources

1. Smartphone Interface
   http://wiki.servicenow.com/index.php?title=Smartphone_Interface

2. Configuring the smartphone interface
   http://wiki.servicenow.com/index.php?title=Configuring_the_Smartphone_Interface

3. Using the smartphone interface
   http://wiki.servicenow.com/index.php?title=Using_the_Smartphone_Interface

4. Mobile Client GlideForm (g_form) scripting
   http://wiki.servicenow.com/index.php?title=Mobile_Client_GlideForm_(g_form)_Scripting

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