Lab Guide

Service Portal:

Transform Your User Experience

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Jon Crane
Will Leingang

Default Login / Password:

admin / Knowledge16

itil / Knowledge16

employee / Knowledge16

This
Page
Intentionally
Left
Blank

Lab Goal

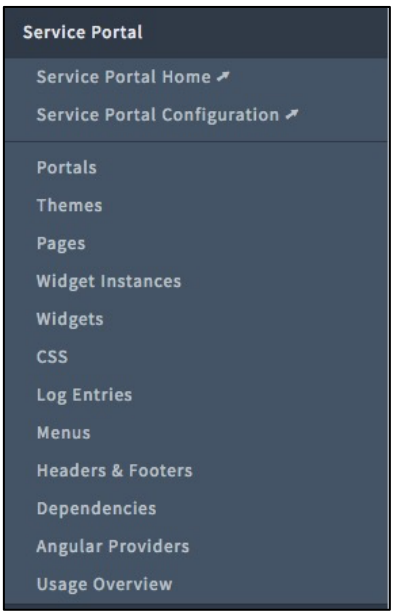
Welcome to the Service Portal lab! This lab familiarizes you with the default Service Portal and what to expect when navigating the new portal.

The Service Portal is a powerful new tool used to rapidly build rich web applications using modern web design concepts for the ultimate User Experience. Take a few moments to get familiar with the default portal.

Lab 1.0
Get Familiar with Service Portal

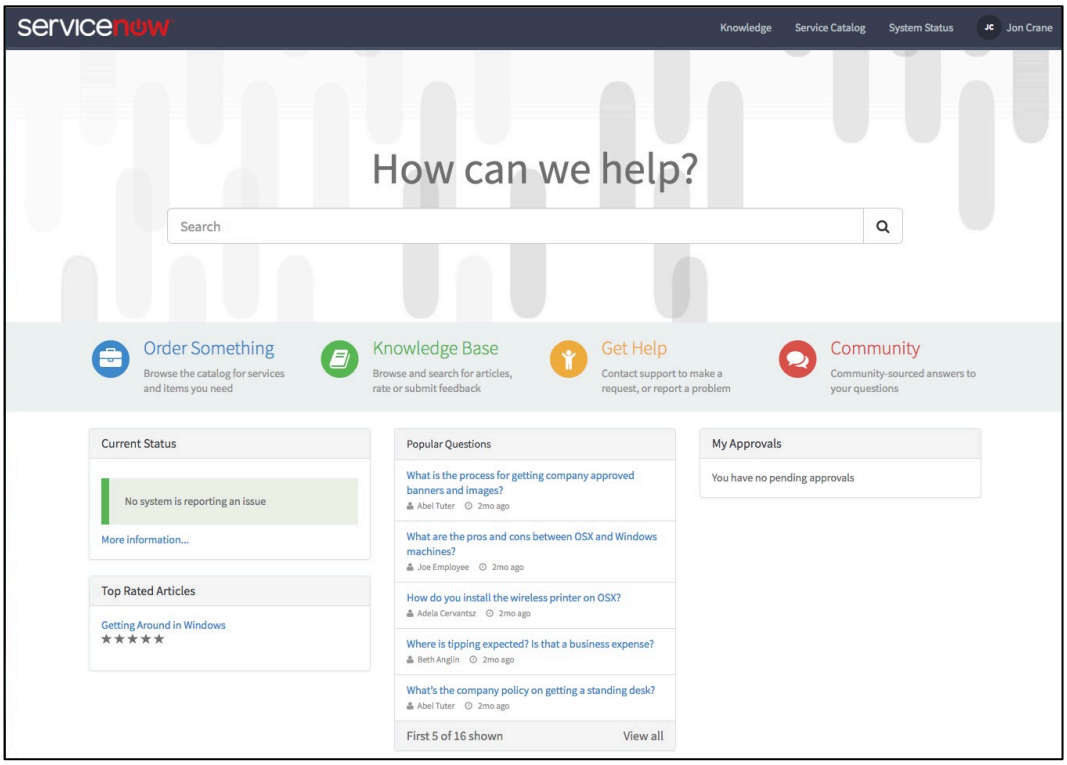
Browse the Service Portal

1. In your instance, type **Service Portal** in the Navigation menu. This shows the Application and all the Modules involved with configuring the Service Portal.



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2. Click **Service Portal Home**. The default Service Portal loads in a new tab.



3. Take a few minutes to click on the elements of the Service Portal. Browse the catalog and order something, or flip through the Knowledge Base. Have fun!

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Lab Goal

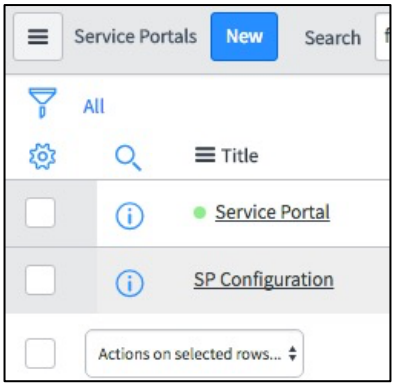
Lab 2.0 Create a Portal

You, as the ServiceNow administrator of your company, have been tasked with designing a new storefront where your users can request new mobile work devices such as laptops and tablets. In this lab, you:

- Create a new, empty Service Portal from scratch
- Apply some basic branding to your portal

Create the Portal

1. In your instance, type **Service Portal** in the Navigation menu. Click on **Portals**.
2. Click **New** to create a new portal.

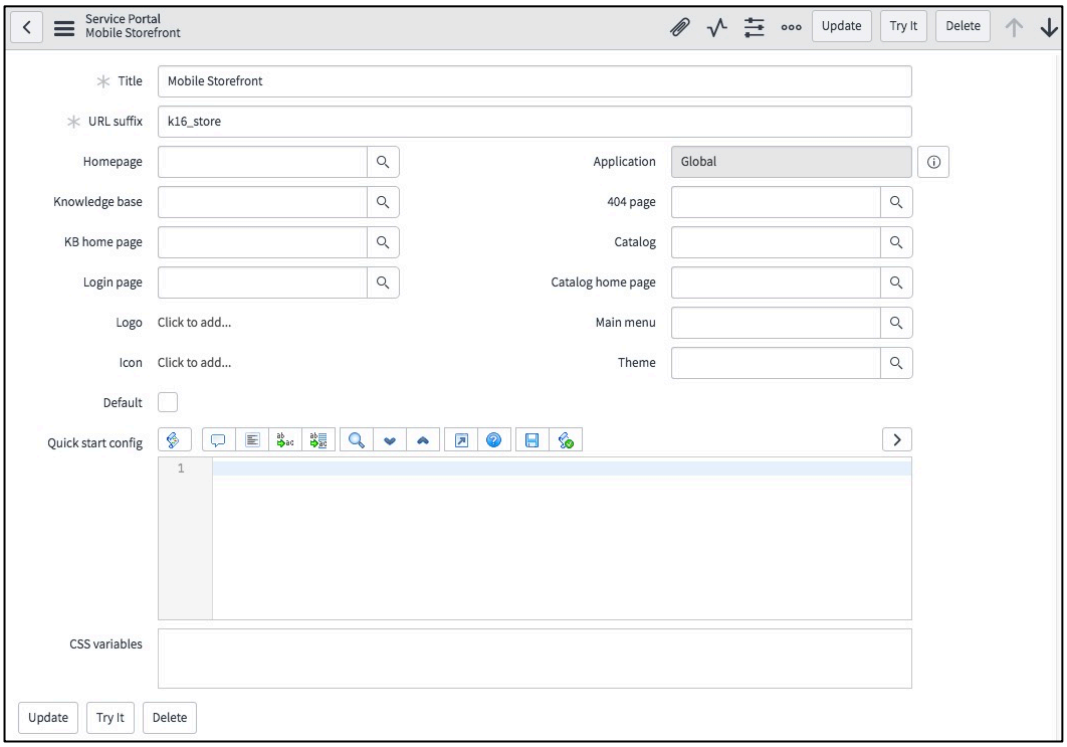


3. Fill in the form with the following fields to create a new Service Portal:

   Name: **Mobile Storefront**
   Version: **k16_store**

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4. Click **Submit** to create the portal.



5. While on the Portal page, there are many ways you can attach pages, even pre-built ones, to handle certain interactions. For example, if a user wants to access the portal for the first time, they need to specify a Login page. Perhaps there is a custom 404 page in case a user clicks a bad link. This can all be configured here. Specify a few presets for your portal here:

   Name: **Mobile Storefront**
   Version: **k16_store**



6. Click **Try it**. Notice that it takes us to the default homepage. This is because you have not yet specified the initial homepage yet.

7. Click **Submit** to save the portal page.

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Lab Goal

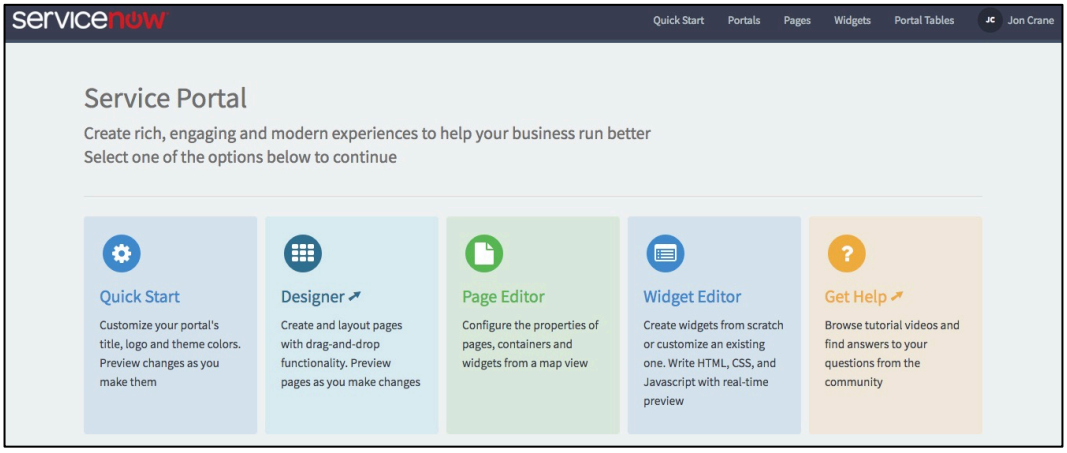
Now that the Portal is created, give it some substance. A homepage must be created to direct users to an initial landing page when they access your portal. In this lab, you:

- Create a homepage using the Designer
- Provide some basic frameworks for how the page will be laid out
- Associate the homepage to the Portal

Lab 3.0 Create a Homepage

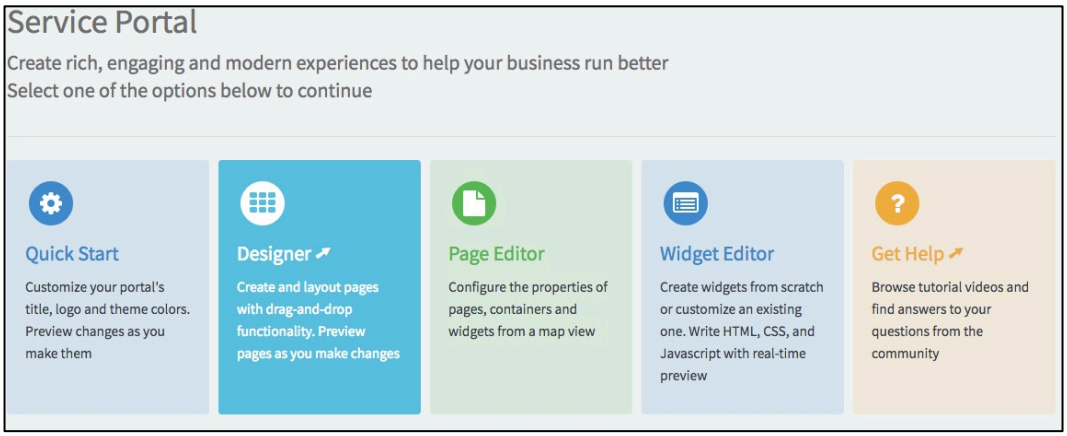
Create a Homepage

1. Click **Service Portal Configuration** in the Navigation menu to open the Configuration utility. This opens on a separate tab.

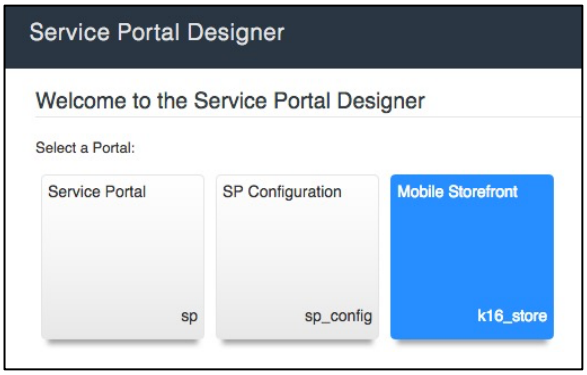


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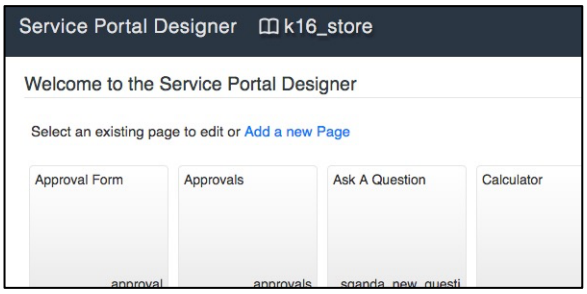
2. Click the menu option **Designer** to open the Portal Designer.



3. The **Service Portal Designer** opens on a new tab. The initial view shows all pages available to your portal. Notice at the top that the portal that is chosen by default is "**sp**". This must be changed to the active portal being worked on. Click the sp icon to change the active portal to the new Storefront.



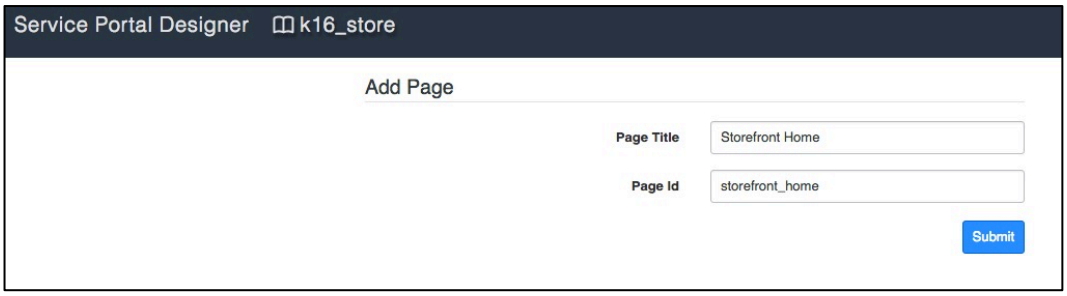
4. The active portal is now set to **k16_store**.



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5. Click the **Add a new Page**" link to create a new page in the portal. Fill in the form with the following fields:

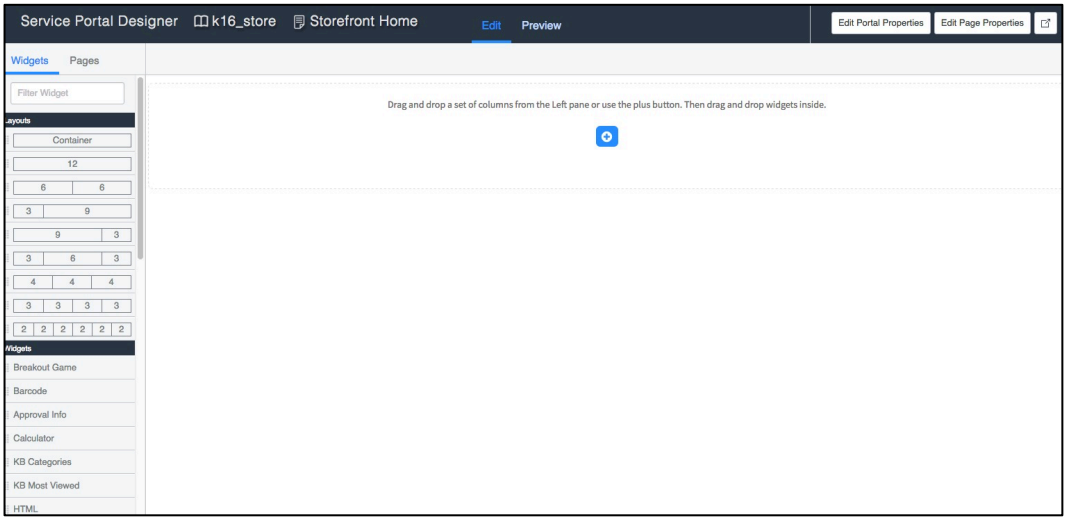
   Page Title: **Storefront Home**
   Page Id: **storefront_home (**This is automatically filled in**)**



6. Click **Submit** to create the page.

Use the Portal Designer

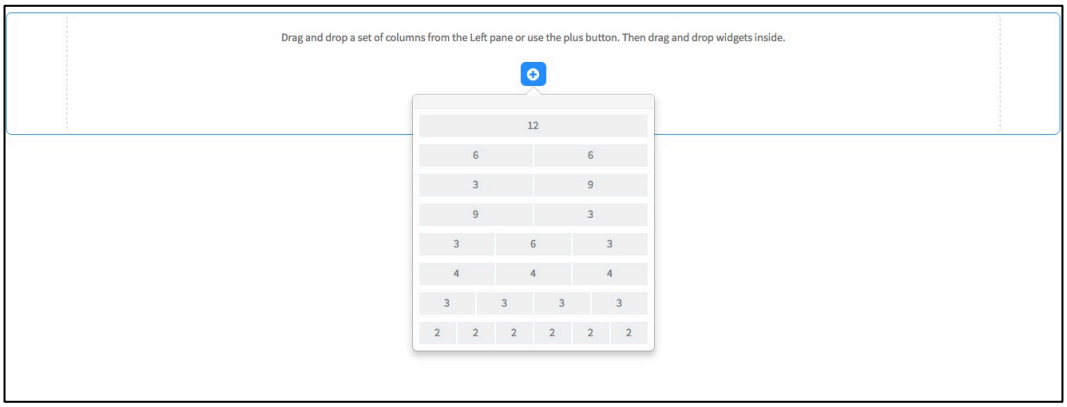
1. When the page is created, the designer for that page loads. The powerful page designer allows for rapid page creation with a simple drag-and-drop interface.



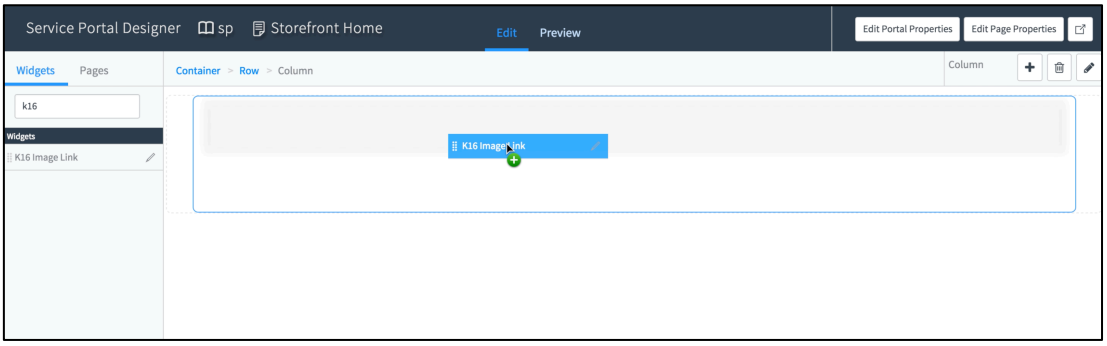
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2. For the layout of the page, use one row for a header, and another row for four image links that users click to order the respective catalog item. By default, one container is already added to the page for immediate use.

   To begin designing the layout, click the  icon to add a row to the container. Select the large **12-block** row to create a row for the header graphic.

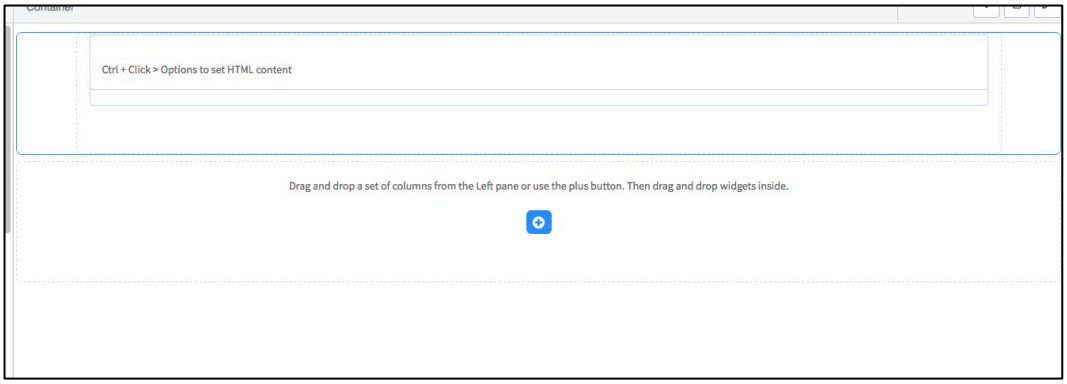


3. In the filter field in the widget pane, type **K16 Image Link**. Locate the HTML widget and drag it to the new row that was just created. This adds a new, empty K16 Image Link widget to the row.

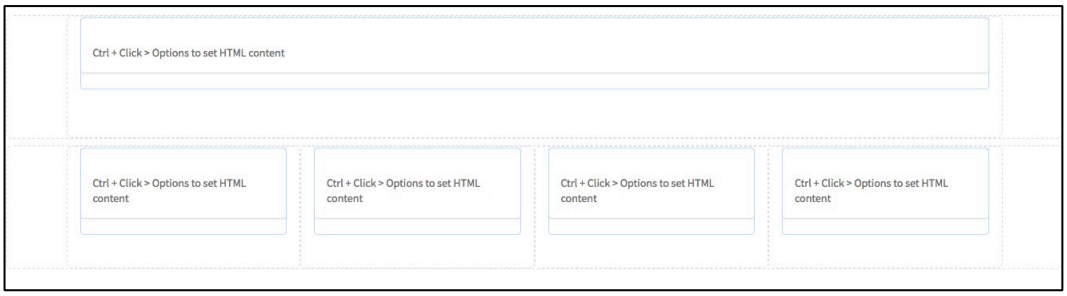


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4. One more row needs to be added. This row contains the graphics to be used in the landing page. Delete the text typed in the last step in the filter field to show all elements. Drag a new Container directly under the existing container. There should now be two containers: one has our K16 Image Link element, the other is empty.



5. Finally, drag the **4-column** row into the new container. This creates four columns inside the new container. Repeat the steps above and add K16 Image Link elements to each column.



6. Now let's take a quick look at the code behind K16 Image Link widget. Hover over the widget in the left panel and click on the  icon; this will open the K16 Image Link in the **Widget Editor**.

7. You can see all the different pieces that make up a widget in a single view:

   HTML Template – The HTML used to define the layout of the widget
   CSS – The style sheet to manage the look and feel of the HTML template
   Client Script – scripting that happens on the client. For example, when an element is clicked or the window loads
   Server Script – Scripts that execute to interact with the Server, such as pull a property or database query

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8. Now get creative. Just like the previous steps, add a container below the four HTML boxes, and choose any widget or widgets you want on the homepage. Let those creative juices flow.

   For some inspiration, you can add a container with a list of **KB articles** so your users know how to use your new portal. Or, add the **Weather** widget, plug in your zip code, and instantly be told whether you need an umbrella at home. Get creative!

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Lab Goal

Lab 4.0
Add Graphics to the Homepage

After the homepage is created and the layout defined, add some graphics to spice up the homepage a bit. In this lab, you:

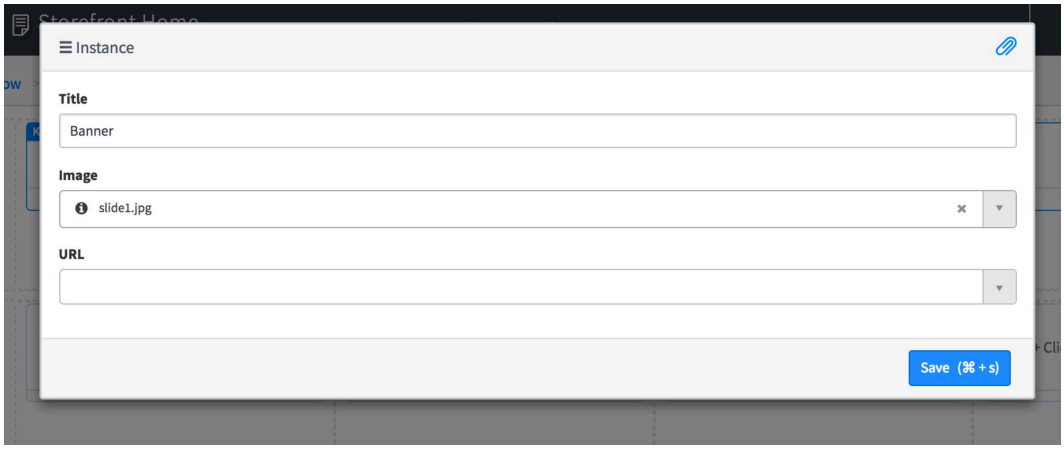
- Add a banner image
- Add images linking to catalog items
- Add a logo to the portal

Add the Graphics to the Homepage Widgets

1. Navigate back to the Service Portal Designer tab. On the top K16 Image Link Widget (the one spanning the entire row), hover over the widget and click the blue **Pencil** icon. This loads the widget in edit mode.

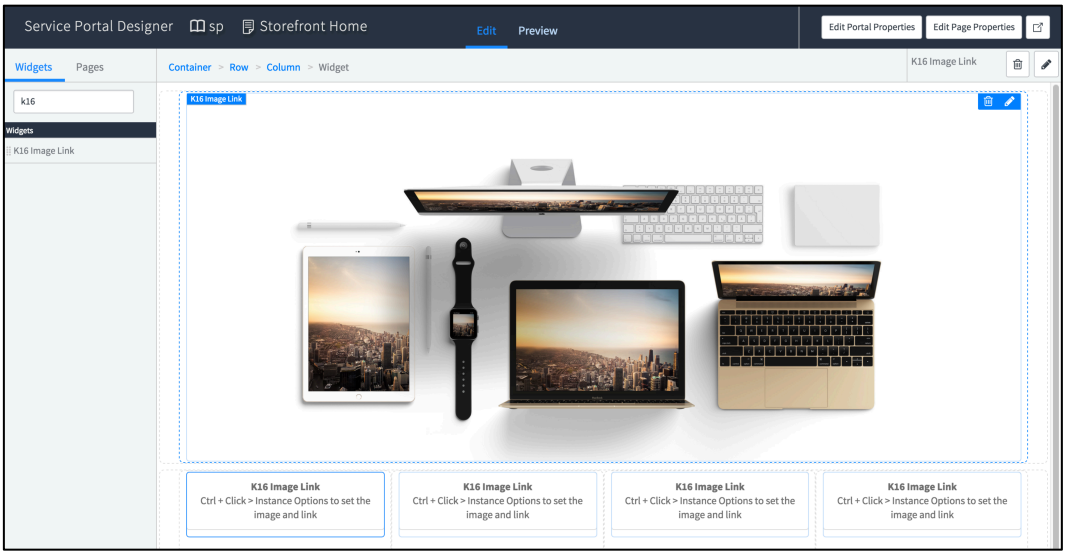


2. From the modal that pops up specify a title, image and a link for your widget.

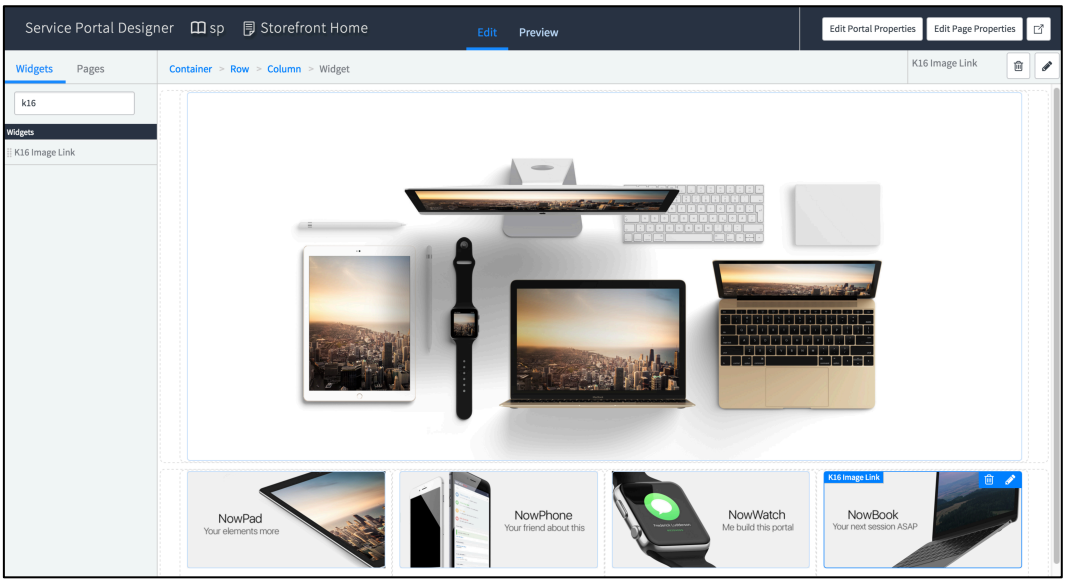


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3. A banner graphic appears on the homepage.



4. Repeat the above steps for each of the remaining four K16 Image Link Widgets. Choose the Images titled “thumb1” through “thumb4”. When finished, your portal should look like the below screenshot. Lookin’ good!

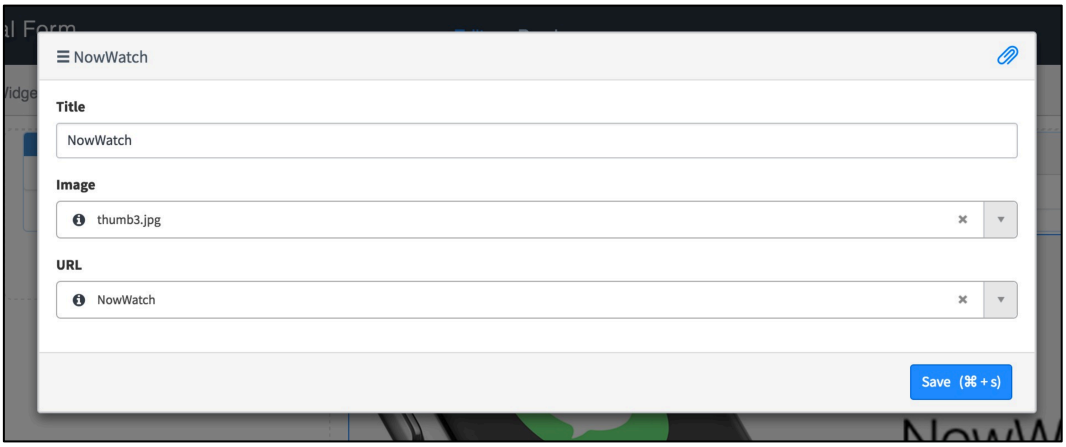


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Add a Link to an Image

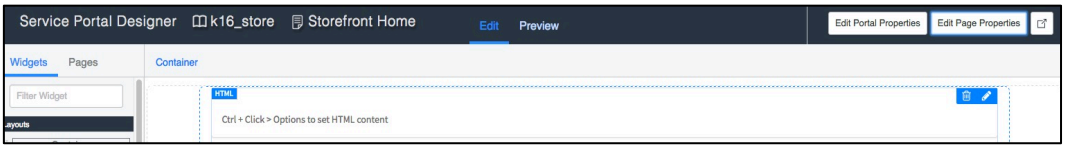
1. Now that the images are added to the portal, make them actually do something. The idea is when a user clicks on an image, they move to the catalog item to order the item they clicked.

   Click the  icon above the NowWatch to configure the widget. In the URL drop-down field, select **NowWatch** to point the widget to the NowWatch catalog item.



Tie It Together

1. Now that the default layout has been established, let's tie our homepage back to the portal. The portal designer can be used not only to lay out pages, but to also lay out basic styling for your portal. Click on the "**Edit Portal Properties**" button at the top-right corner of the designer to open the Portal properties.

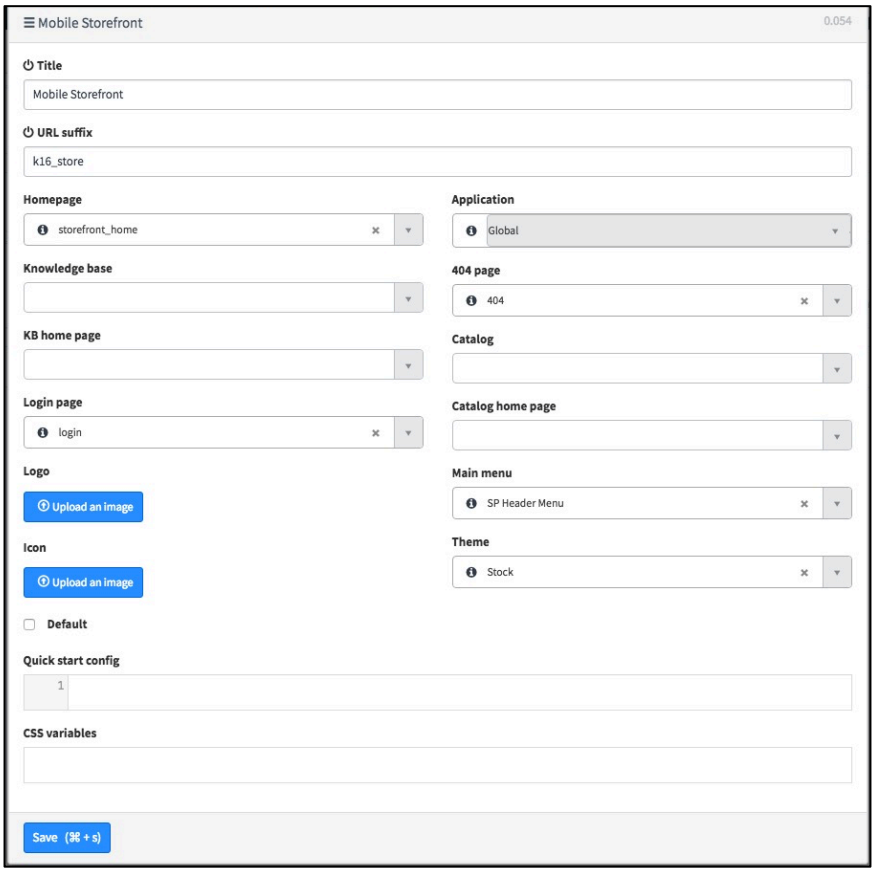


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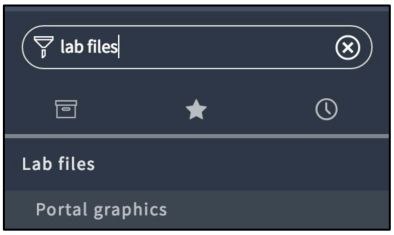
2. Fill out the form below to update the Mobile Storefront portal. Note that adding the Homepage sets the default homepage for your portal! Give the page a theme before exiting:

   Homepage: **storefront_home**
   Theme: **stock**

   Click **Save** when done.

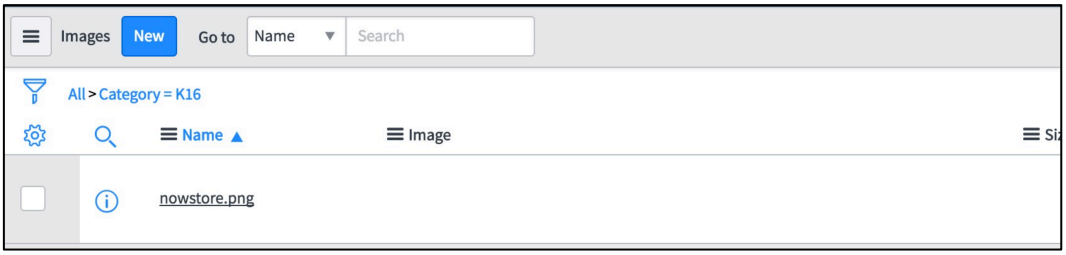


3. Leaving the Portal Designer tab open, go back to the ServiceNow instance tab. In the Navigation Menu, type **Lab Files**. Click **Portal Graphics**.

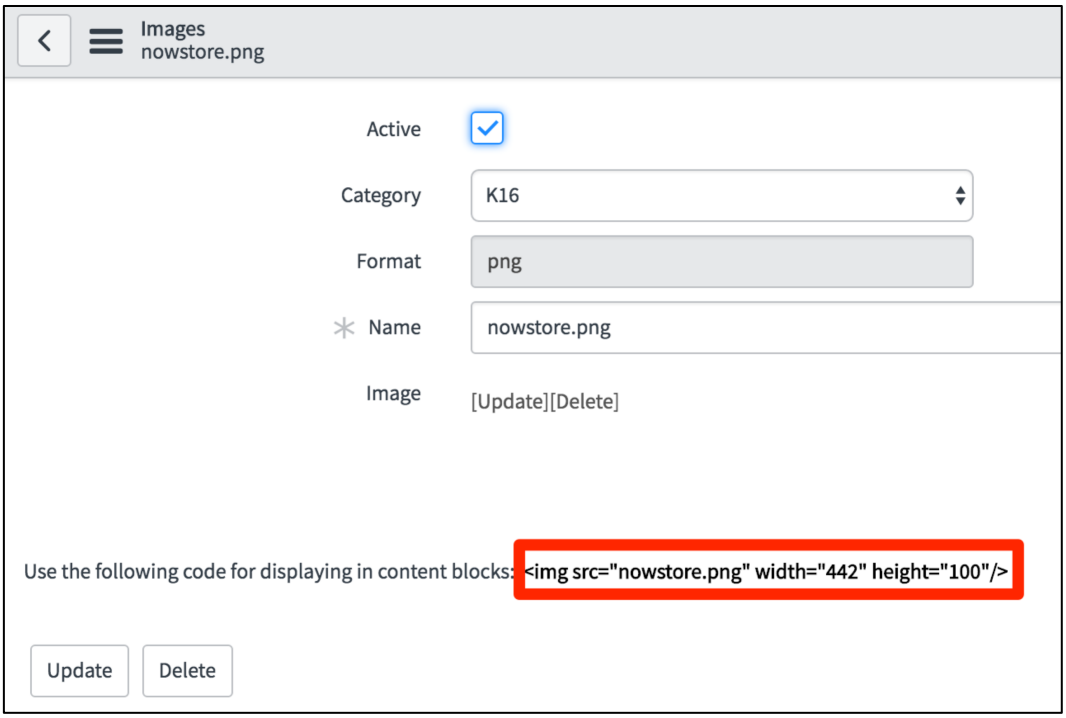


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4. In the list of images, click **nowstore.png**.

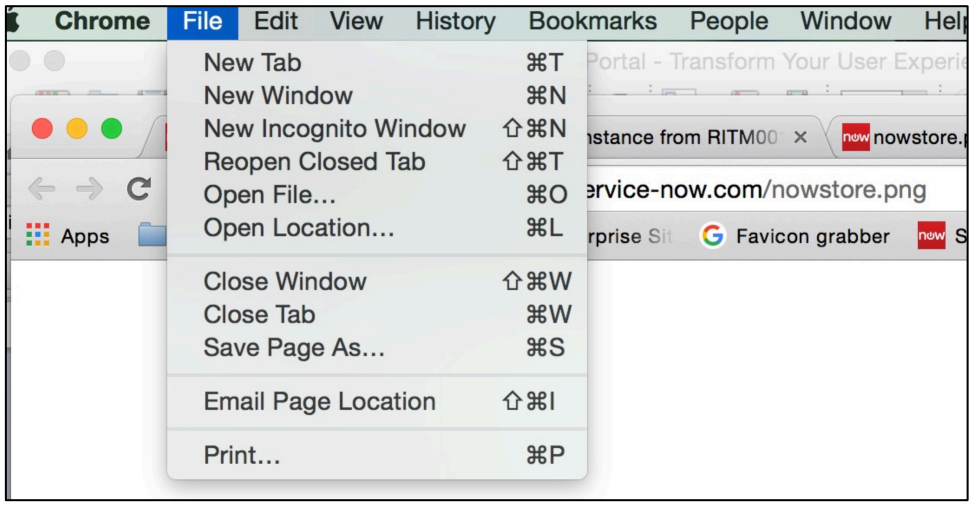


5. On the image form, click the bold image link at the bottom of the form to open the image in a new tab.



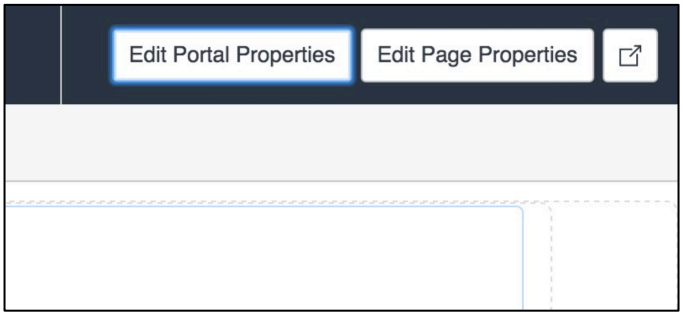
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6. In the new tab that opens, click **File > Save Page As**. This saves the graphic to your computer. Choose a folder to store the graphic and save it.



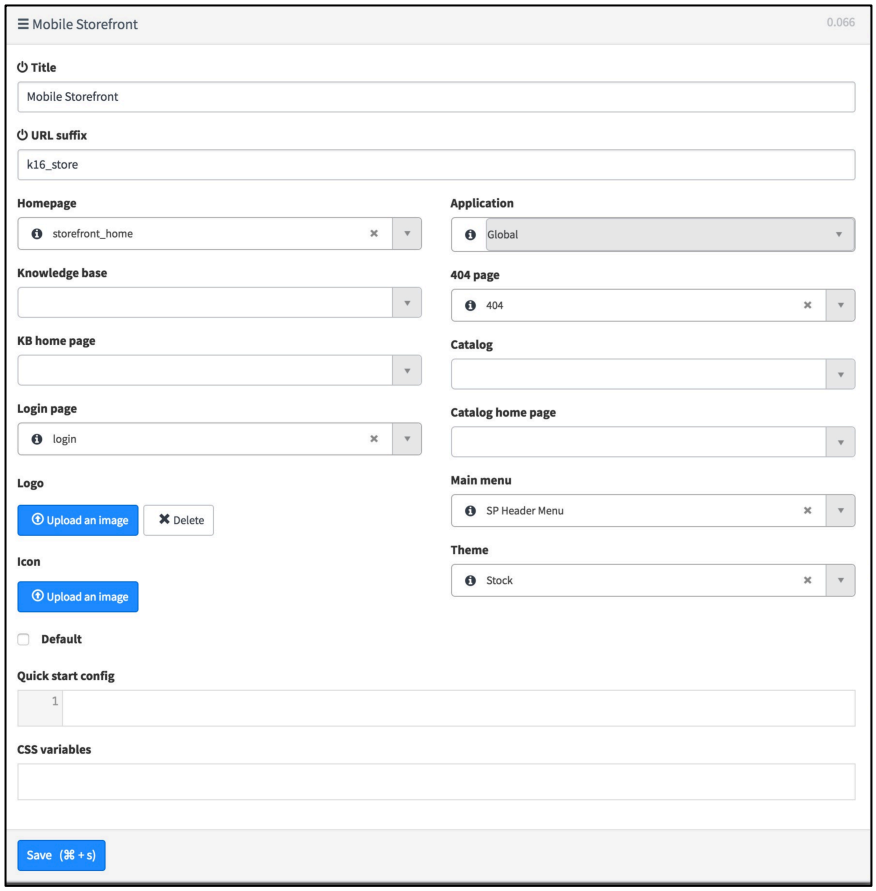
7. Click on the tab for the **Service Portal designer** to go back to the Designer.

8. In the top-right of the form, click **Edit Portal Properties**.



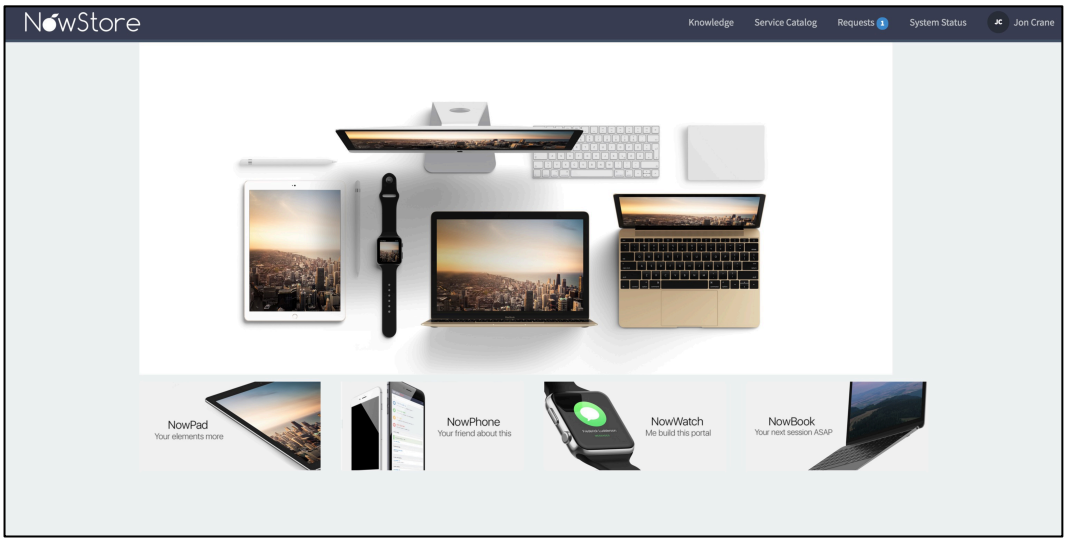
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9. The form should already look exactly as it looks in the below screenshot. Click the **Upload an Image** button under **Logo**. Add the image downloaded from the previous steps titled **nowstore.png**. Click **Save**.



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10. At the top of the page, click **Preview** to view the portal in Preview mode.

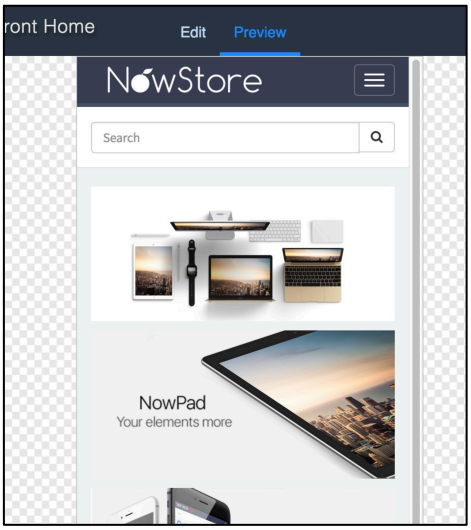


11. Click the **NowWatch** link and order a shiny new NowWatch.

12. Click the main logo to return to the homepage



13. Click the **Device** buttons in the top-right of the form () to view the portal in a Phone and Tablet view.



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14. Since the Service Portal automatically adopts a modern, responsive design, it resizes to the right device effortlessly!

    Why is this important? Simply put, your users today demand the same experience at work as they get on their mobile devices at home. Now, more than ever, applications need to be designed for multiple devices to support the fast-paced, mobile lifestyle of today's workforce. Having a simple, mobile interface will drive adoption and increase user satisfaction.

    Because of the new Service Portal, all of this is done for you. Talk about Service **Now**!

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Lab Goal

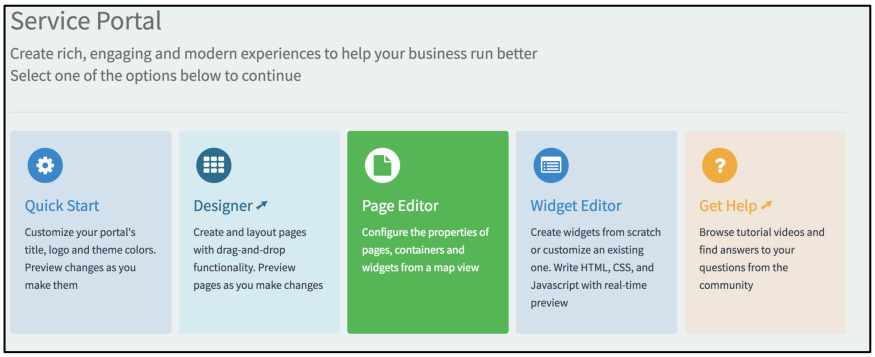
Lab 5.0 Enhance the Style with CSS

Your homepage is looking great so far! You just received a few more requirements, though, around styling. Make some last-minute modifications to the design. CSS to the rescue! In this lab, you:

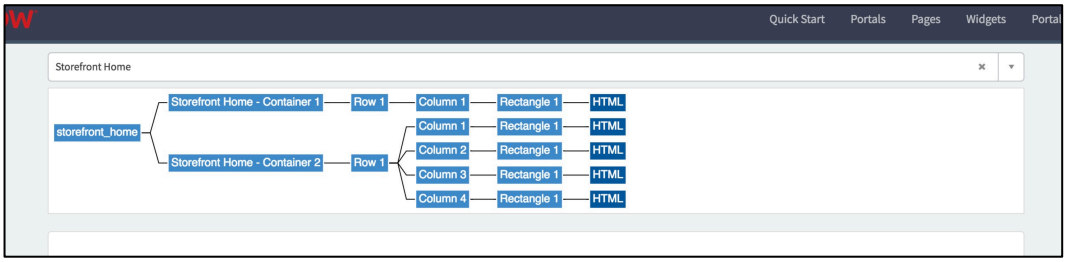
- Use the Portal Page Editor
- Add CSS to override styles on the homepage
- Edit elements on the portal directly from the Editor

Use the Page Editor

1. In your instance, navigate to **Service Portal**, then **Service Portal Configuration**. Open the **Page Editor**.



2. In the Homepage Editor, search for **Storefront Home**. This opens the page in the **Editor** view.



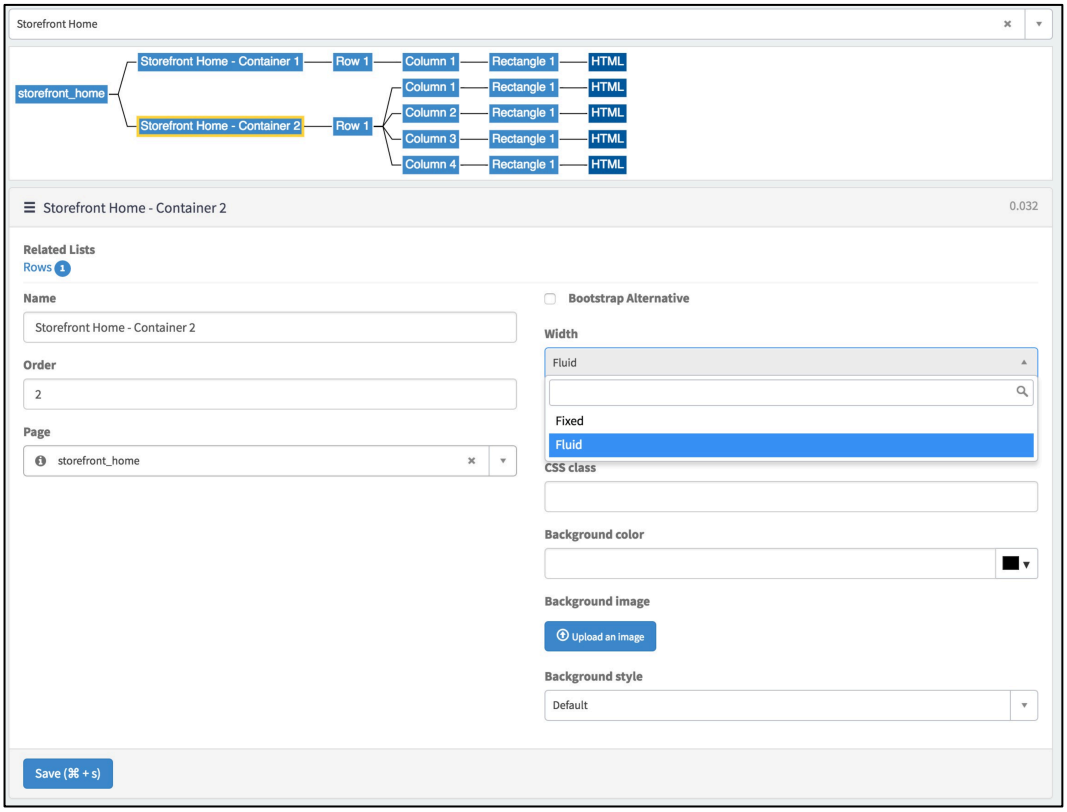
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3. Click the top-level node titled **storefront_home**. Locate the field called **Page Specific CSS**. Type the below CSS into the text box. Click **Save**.

```
body {
  background-color: #fff;
}
```

4. Click the node directly below **storefront_home** called **Storefront Home – Container 2**.

5. In the Width drop-down box, set the width to **Fluid**. This makes the container span the entire width of the page.



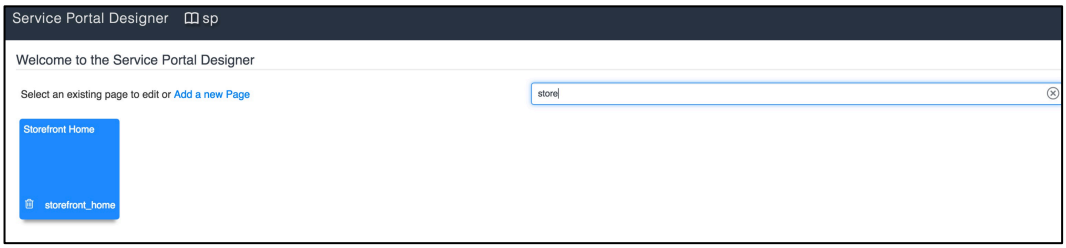
6. Click **Save**.

7. Back in the instance, click **Service Portal Configuration** again to move to the Configuration page. Make sure **k16_store** is set as your portal.



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8. Click on the **Designer** box. Search for and click on Storefront Home.



9. Click **Preview**.

10. Notice the new style changes. The background is all white, and the image boxes take up the entire row. Customizing the portal is simple with CSS and Bootstrap!

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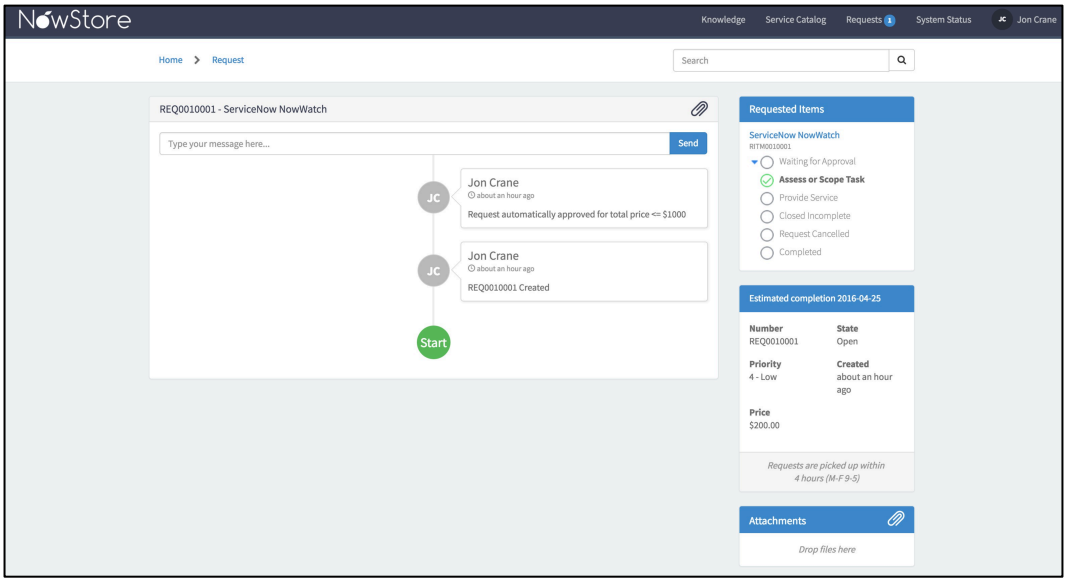
Lab Goal

Your work is complete and users are excited to finally have a storefront to request the hottest new mobile devices. Take it for a spin.

Lab 6.0
Take It for a Spin

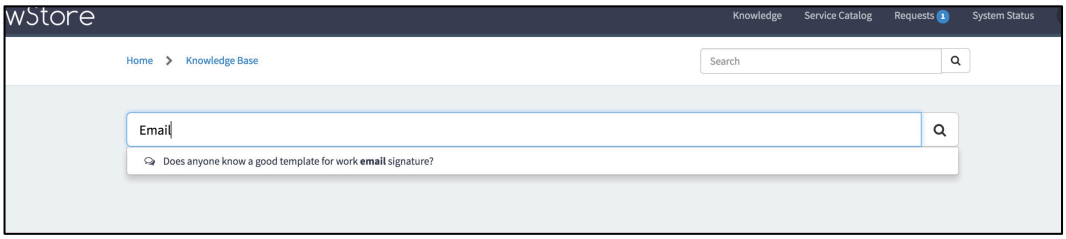
Use the Service Portal

1. In a new browser tab, in the URL bar type: https://<<YOUR INSTANCE URL>>.service-now.com/k16_store.
2. Click the **NowWatch** item and order a new watch.
3. In the header bar, click **Requests** to view the real-time status of your request.

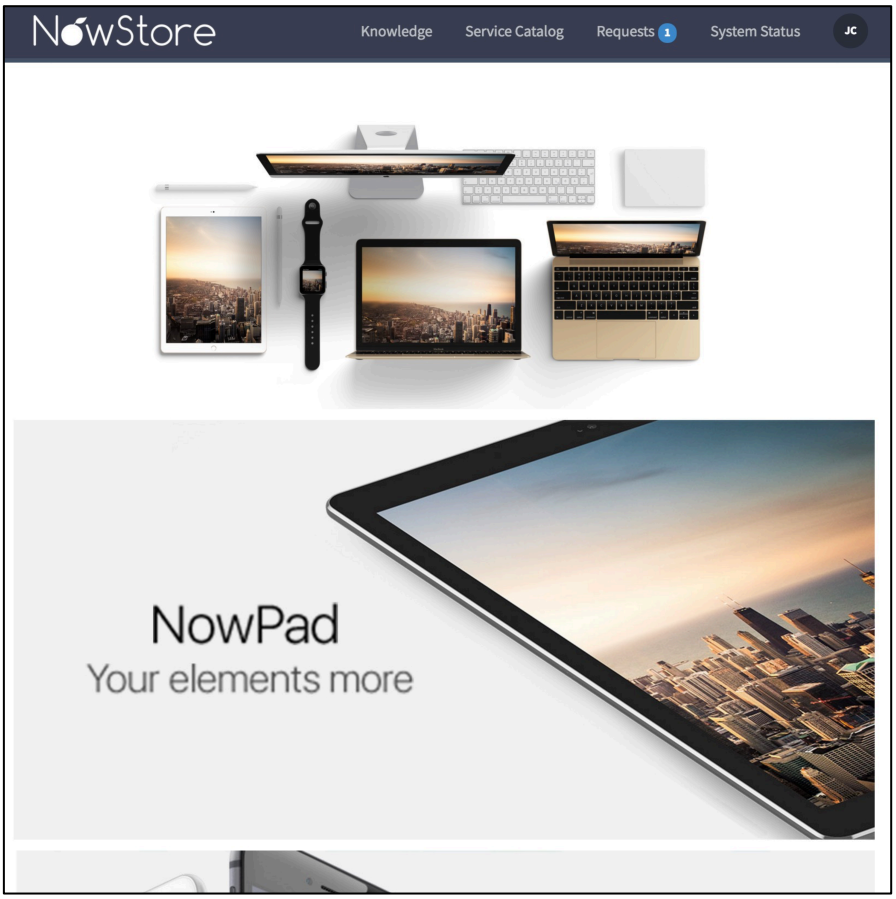


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4. In the header, click **Knowledge**. Perform a Search of the Knowledge Base for "**Email**."



5. Shrink the browser window horizontally and watch the Portal intelligently respond to your device size and align itself accordingly. Responsive design in action!



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Lab Goal

This lab explores some remaining advanced features. Additionally, it summarizes how each of these components fit together.

Lab 7.0 Advanced Features and Final Thoughts

Other Ways to Configure Your Portal

1. In your instance, type **Service Portal** in the Navigation Menu. Click the **Service Portal Configuration** to open the Designer view.
2. Click **Branding Editor**.
3. Experiment with some of the features and tweaks you can make to the default portal.

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Why Service Portal?

1. Easy to create new portals for multiple lines of business.
2. Adding pages to portals is simple with the Portal Designer.
3. Page Editor gives a visual view of the layout of the portal for easy administration and control. No more guesswork over how the site is interconnected.
4. Responsive design ensures the portal is usable on all modern mobile devices with no additional configuration.
5. Interacts with the powerful underlying ServiceNow Platform. All platform components can be accessed from the portal. The possibilities are endless!
6. Modern web design frameworks are the foundation of the Portal (Bootstrap, AngularJS, CSS).
7. Advanced web designers can create rich web applications right on the ServiceNow Platform.

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