knowledge17

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Lab Guide

Shared Services:

Deliver a True Platform for All Departments

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Default Login / Password: Knowledge17

admin / Knowledge17

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servicenow

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Lab Goal

Lab 1.1 Create a Portal

In the following lab scenario, you have been tasked with building a Service Portal for the **Theme Park Management** department of "Exhilaration Nation" Theme Park company. This portal must be a part of a centralized company Service Portal, so that employees do not have to visit all portals individually anymore.

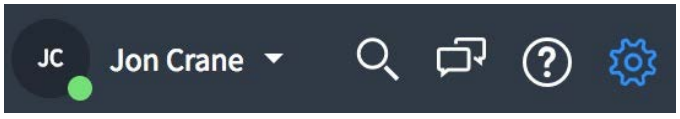
When building custom Service Portals, the Portal record is the most important artifact. It tells various components of your Service Portal how to behave, which styles to use and which pages to use for different purposes such as Login and 404 pages.

In this lab, a new portal page is created to set the foundation for the portal.

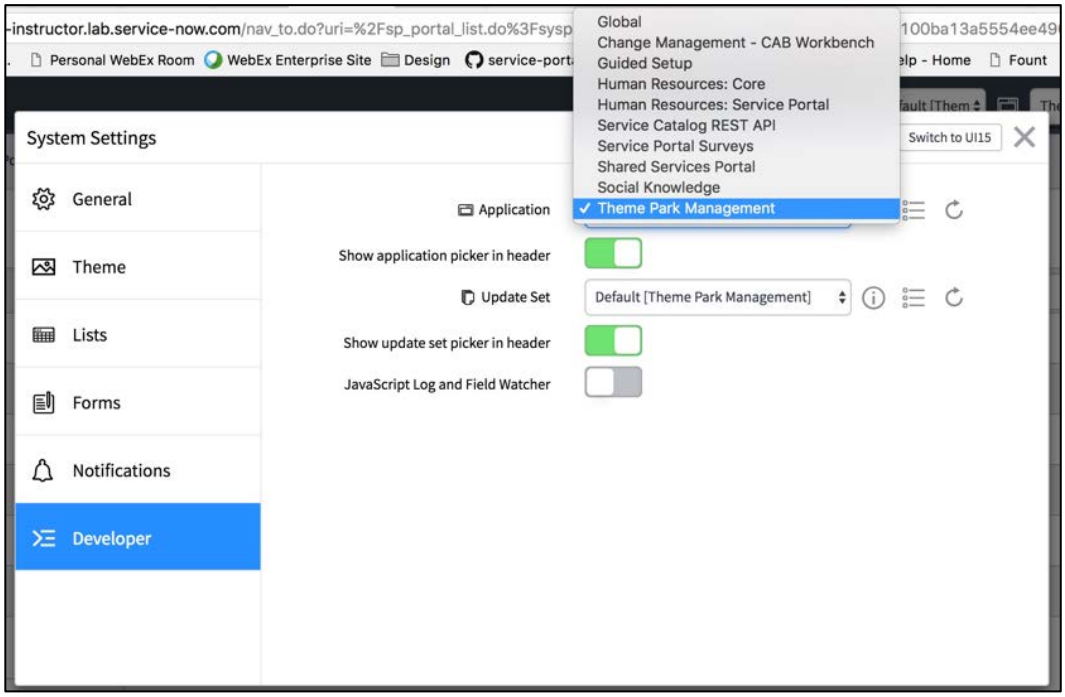
Switch to the Proper Application Scope

The new Portal should be built in the same application scope as the Theme Park Management application. This allows for easy management, delegated development and source control of the portal.

1. In the instance, click the **Gear icon** in the top-right corner to **open System Settings**.



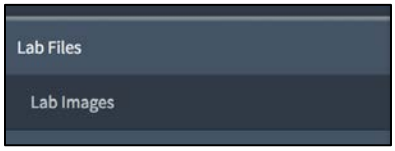
2. Select the Developer tab, and set the Application to **Theme Park Management**.



Create the Portal

The Portal record determines how the portal and its components behave and interact.

1. In the Navigation menu, select **Lab Files > Lab Images**.



2. In the page that opens, right-click the Logo under the **Lab 1.1** panel and **save** it.



3. Navigate to **Service Portal > Portals**. Click **New**.

4. In the New Portal form, complete the following fields:
   Title: **Theme Park Support**
   URL Suffix: **tps**
   Homepage: **tps_home**
   Knowledge Base: **Theme Park Management**
   Logo: **logo.png** (This is the logo downloaded from Step 2)
   404 Page: **404**
   Catalog: **Theme Park Management Catalog**
   Theme: **Theme Park Management Theme**

5. Click **Update** or right-click in the header and use **Save.**

Lab Goal

Themes allow custom styles to be applied to portal pages and widgets. Most organizations have their own branding and Cascading Style Sheets (CSS) that are used for external and internal collateral. Themes allow administrators to apply those same style sheets to give a ServiceNow Service Portal the same look and feel as a regular company page.

This lab focuses on applying a theme with custom Styles to the Theme Park Management portal.

Lab 1.2 Apply a Theme

Apply Style Sheets

There are currently no style sheets applied to the Portal, so it inherits base platform styles. CSS needs to be applied to the theme to override the base styles and make the portal take on a look consistent with company branding.

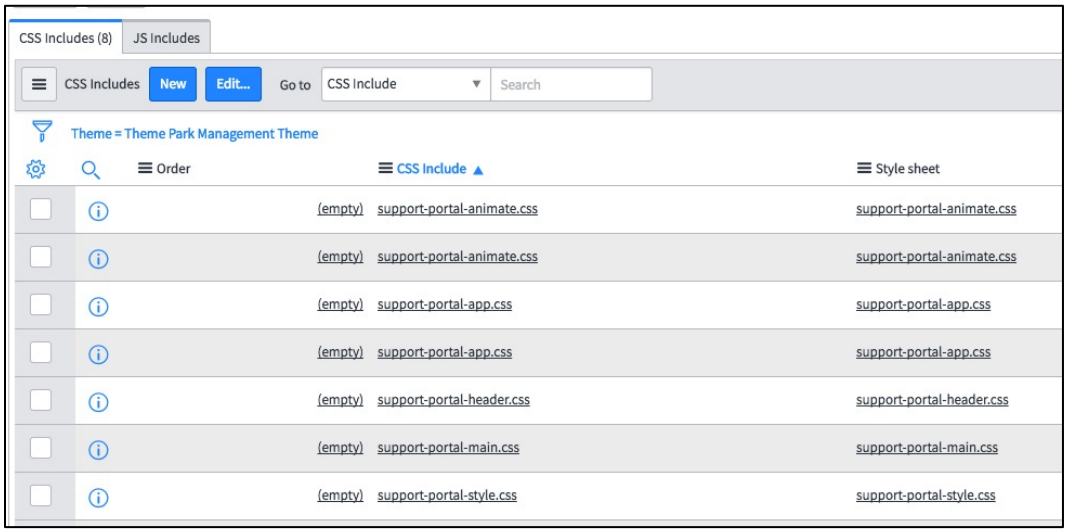
1. In the Portal record that was just created, click the **Reference icon** beside the Theme to navigate to that theme record.



This theme has been pre-created for use in the Theme Park Management portal. The Header references the out-of-the-box **Stock Header**, which is also used in the out of the box Service Portal (the Header changes later).

The **CSS Variables** field allows for override predefined CSS variables. Administrators can apply styles to these variables in a theme and distribute it across all portals if needed.

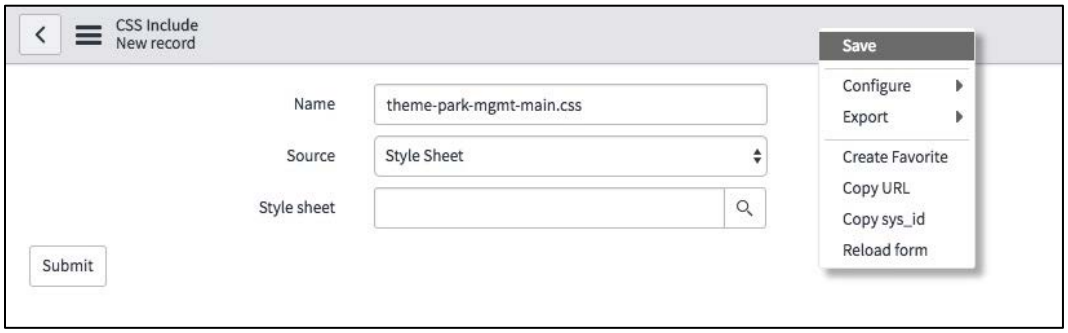
2. Scroll to the **CSS Includes** related list.



This related list contains style sheets that can either be created by Administrators or imported from company style sheets or third-party libraries. This allows Administrators to import style sheets easily, attach them to portals, and immediately start using them.

Some style sheets have already been created and attached to this theme.

3. Under **CSS Includes**, click **New**. Complete the CSS Includes form following the below example:



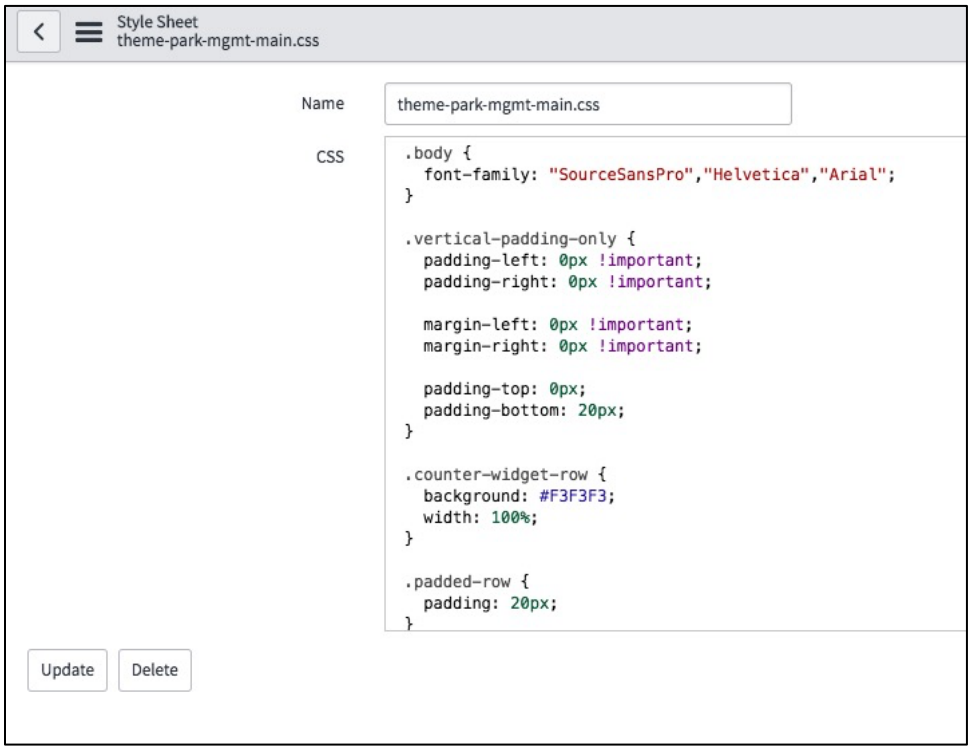
Name: theme-park-mgmt-main.css
Source: Style Sheet

4. Right-click in the form header **> Save.**

5. Within the same CSS Include record, click the **magnifying glass** icon beside the **Style sheet** field.



6. In the window that opens, click **New**. Complete the new Style Sheet form.



Name: **theme-park-mgmt-main.css**
CSS:

```
.body {
  font-family: "SourceSansPro","Helvetica","Arial";
}

.vertical-padding-only {
  padding-left: 0px !important;
  padding-right: 0px !important;

  margin-left: 0px !important;
  margin-right: 0px !important;

  padding-top: 0px;
  padding-bottom: 20px;
}

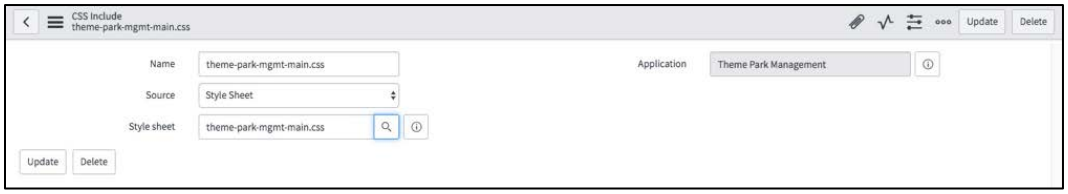
.counter-widget-row {
```

```
  background: #F3F3F3;
  width: 100%;
}

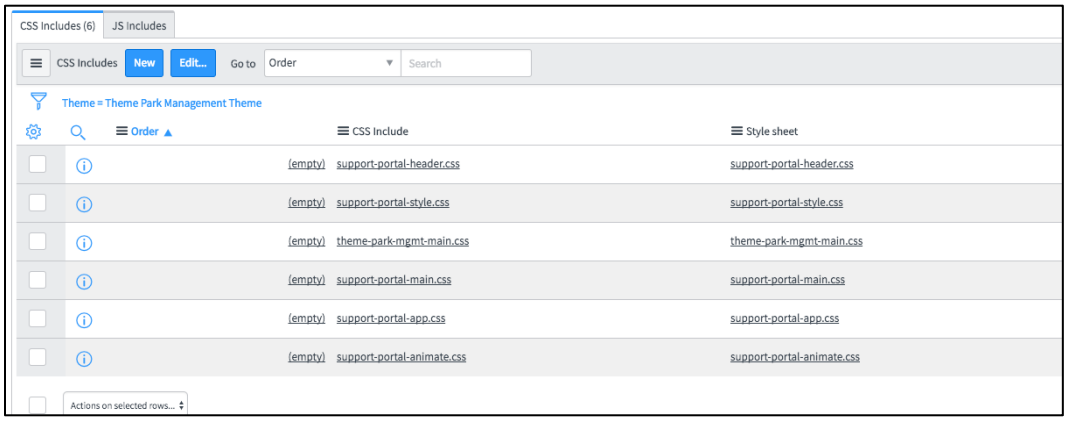
.padded-row {
  padding: 20px;
}
```

7. Click **Submit**.

8. Click **Update** on the CSS Include record.



9. Verify that the CSS Includes related list has an entry for the **theme-park-mgmt-main.css** include that was just created.



Lab Goal

Lab 1.3 Add Homepage Content

Portal Pages are the fundamental mechanisms to deliver delightful user interfaces using Service Portal. Pages are built using a combination of drag-and-drop Containers, Rows, Columns and Widgets.

Containers consist of Rows and Columns.

Rows contain Columns, and resize the Columns using a Bootstrap grid layout to allow for easy access on Mobile devices.

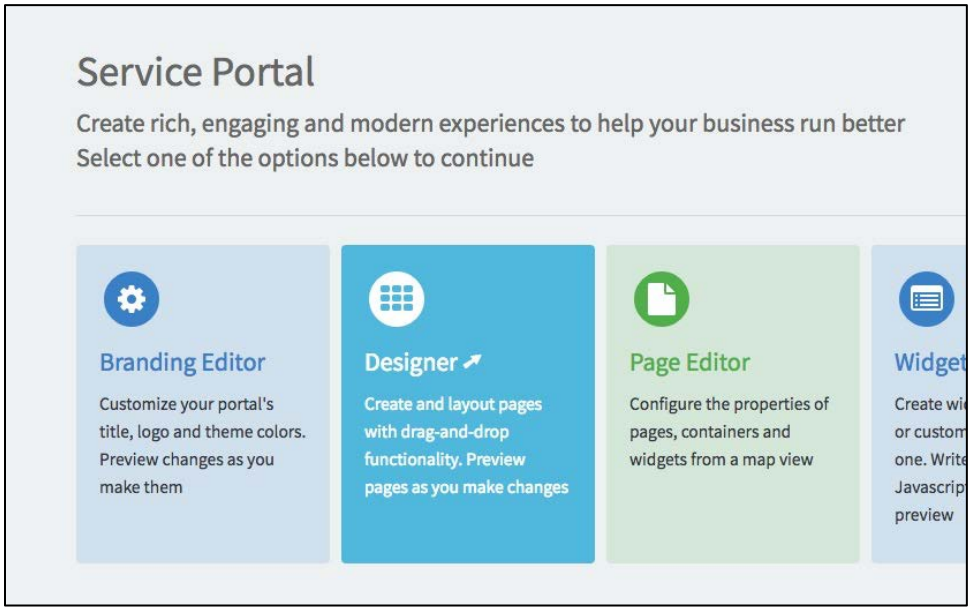
Columns are containers for Widgets.

Widgets provide pages with the content presented to the end users.

Add a Homepage Search Widget

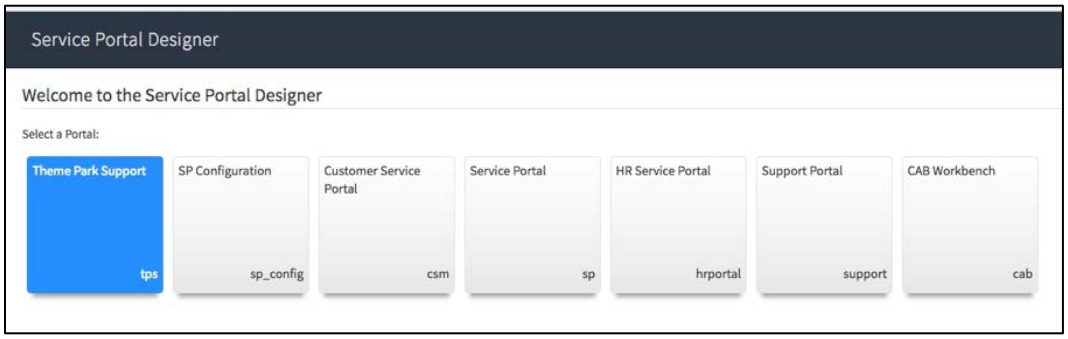
1. Navigate to **Service Portal > Service Portal Configuration**. The Service Portal Configuration page combines all elements of a Service Portal into a single configuration page.

2. Click **Designer**.

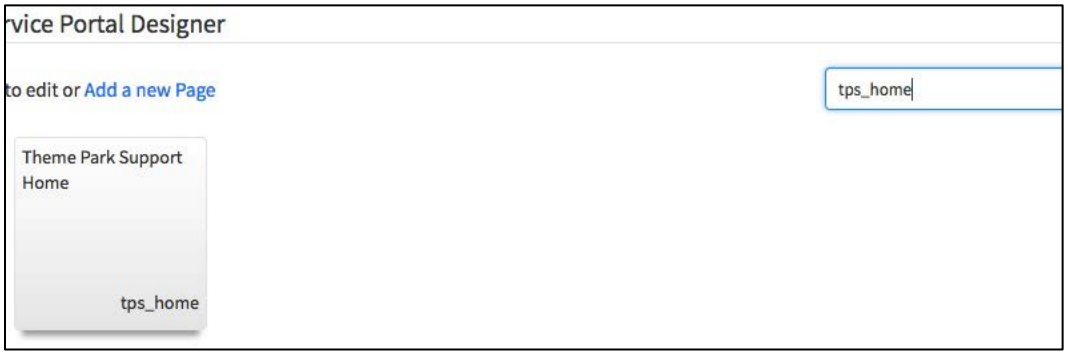


3. At the top of the Page Designer, locate the **book** icon.


4. This may read **sp,** but it could also read **cab**. Click the icon and choose the **Theme Park Support** portal. This allows for viewing changes to pages within the style context of a specific portal, but technically it does not matter which portal is selected, since pages are independent from portals.

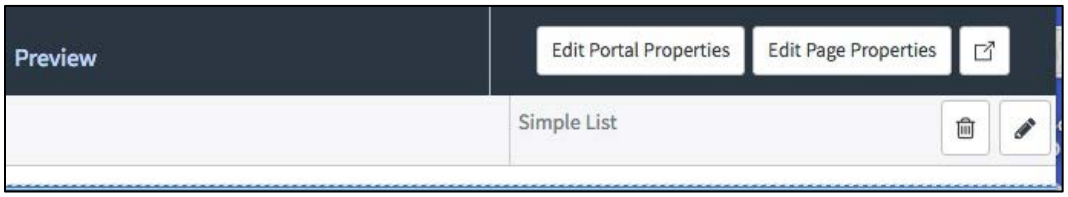


5. In the Page Designer, type **tps_home** in the search bar to locate the Theme Park Support Homepage. This opens the **tps_home** page in Designer view.



6. The page opens in the Designer view. This view is where Administrators add widgets to Portal pages and configure the page layout.

7. Pages can be styled at the top level to provide a consistent look and feel across the entire page. To change the background of the entire page from light gray to white, click the **Edit Page Properties** in the top-right corner of the designer.



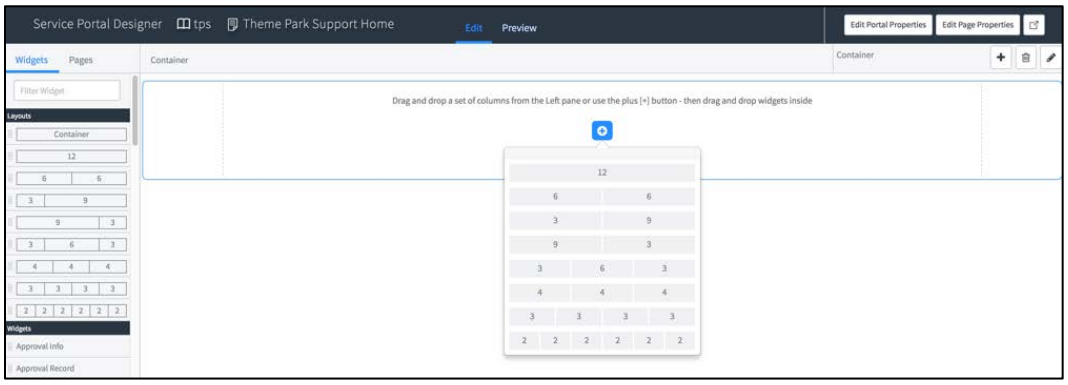
8. Edit the Page and complete the form per the example below.

   Page Specific CSS:

```
.page {
  background: #fff;
}
```

9. Click **Save** to save the CSS changes.

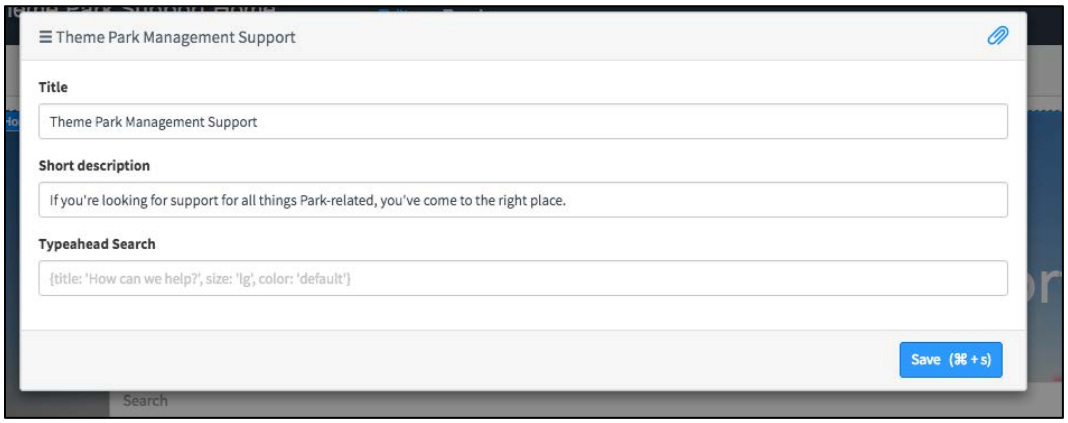
10. Before Widgets can be added, a page needs containers, rows, and columns. On the page, click the **+** (plus) icon to add a **12-column Container**.



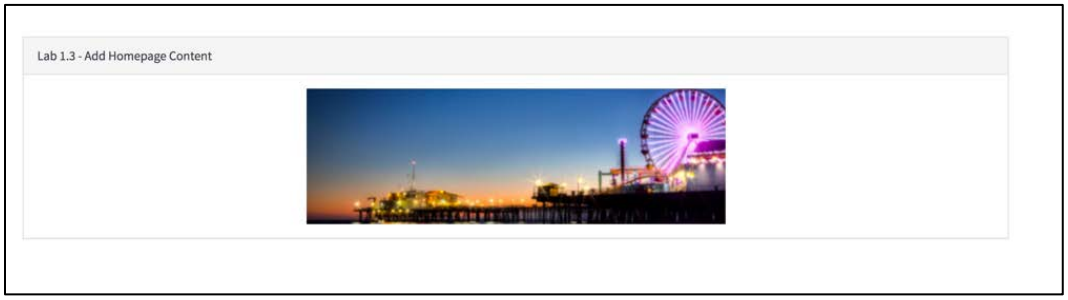
11. From the Widget list, drag the widget titled **Homepage Search** inside the container.



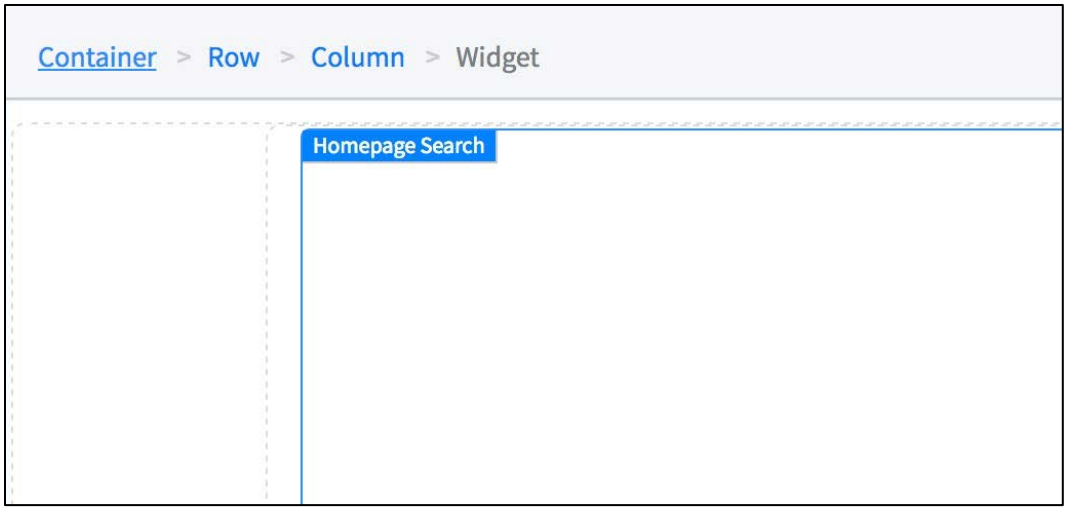
12. There should now be a Search bar in the container. Click the pencil icon ( ) in the top-right corner of the widget to edit the widget settings. Choose a **Title** and a **Short Description** for the Search widget and click **Save**.



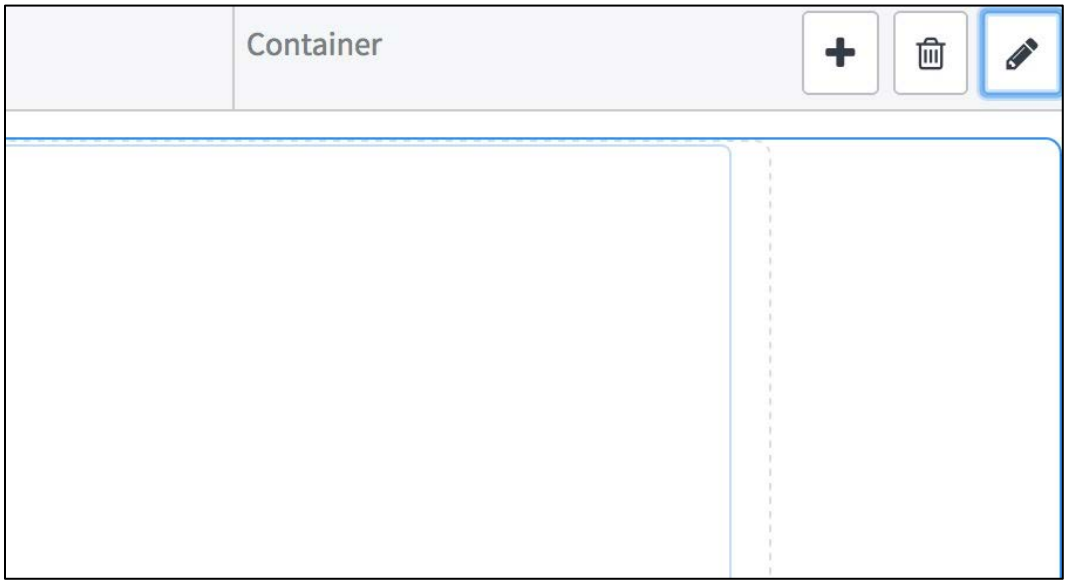
13. Return to the tab with the primary ServiceNow UI and navigate to **Lab Files > Lab Images**. **Do not close the Page Designer** tab. Download the **1.3 lab image** per the instructions on the page.



14. Return to the Page Designer browser tab. Click the **Widget** and, using the Breadcrumbs within the Portal Designer, click the **Container** label (the left-most item in the breadcrumb). Breadcrumbs allow for full control over the Container, Column and Row that contains the widget.

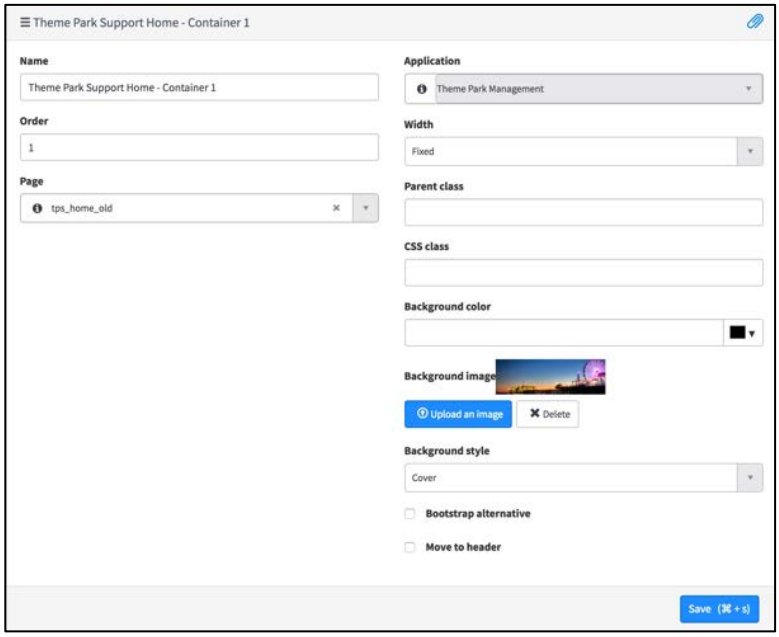


15. Click the **pencil** icon at the top-right of the canvas to modify the Container's settings.

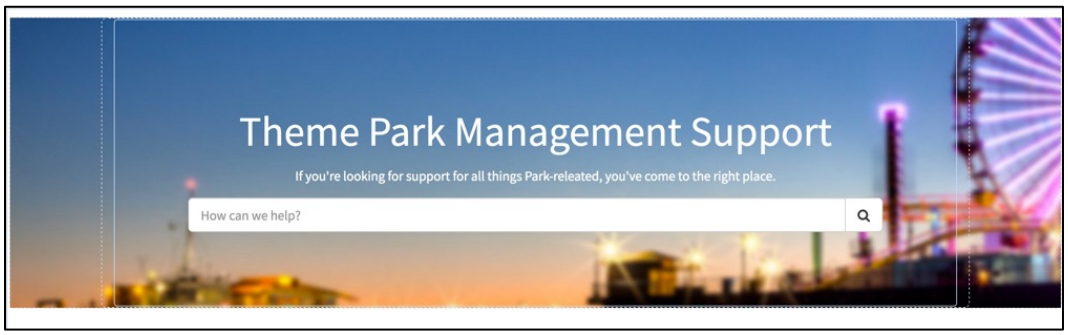


16. In the Container settings, upload the image downloaded from step 9 by clicking the blue **Upload Image** button. Click **Save**.

    Background Image: **Choose the image downloaded from Step 9**
    Background style: **Cover**



17. The Homepage Search widget has successfully been added to the home page and configured.



Lab Goal

Adding Containers, Rows, Columns and Widgets to portal pages is easy! Widgets can be easily configured without the need to write any code.

In this lab, Tile Link widgets are added to give users visual links to click to direct to other pages of the portal.

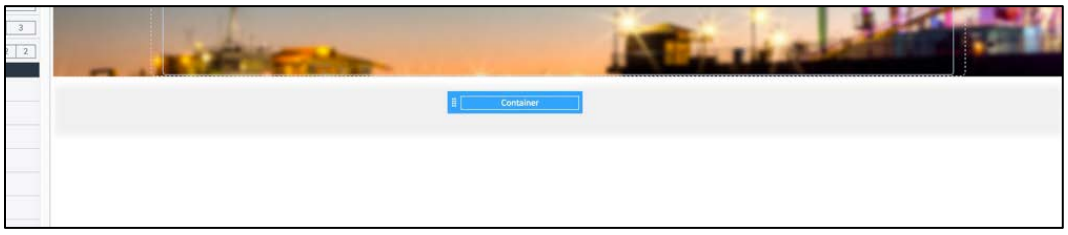
Lab 1.4
Add Tile Link Widgets

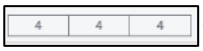
Add Link Widgets

1. Navigate back to the Page Designer for the **tps_home** page (**Service Portal > Service Portal Configuration > Designer**).

2. Add a new Container directly below the Homepage Search widget container from the Layout section on the left side (where you find widgets, containers, layouts).

   Hint: if you previously searched for **Homepage Search** in the Widgets column on the left side, you will have to remove the **search term** for the Layout section to come up again.



3. Click the **+** (plus) and choose the **3-column** layout (

).

4. In the Widget list, drag a **Tile Link** widget to the three columns created in the last step. There should now be **three** Tile Links in the container.



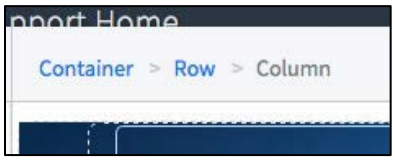
5. Navigate back to the tab with **ServiceNow Platform UI/native UI** (the non-Service Portal UI). **Do not close the designer tab.**

6. Click **Lab Files > Lab Images**. Download the images for this lab per the instructions on the page.

7. With all the Tile Links in place, click **each** empty Tile Link to find the blue **pencil** icon ( ) at the top right. Click the **pencil** icon to edit each Tile Link's properties. Use the table below as a guide for setting the field values of the Tile Links. After the fields have been entered on each Tile Link, **Save** the widget.

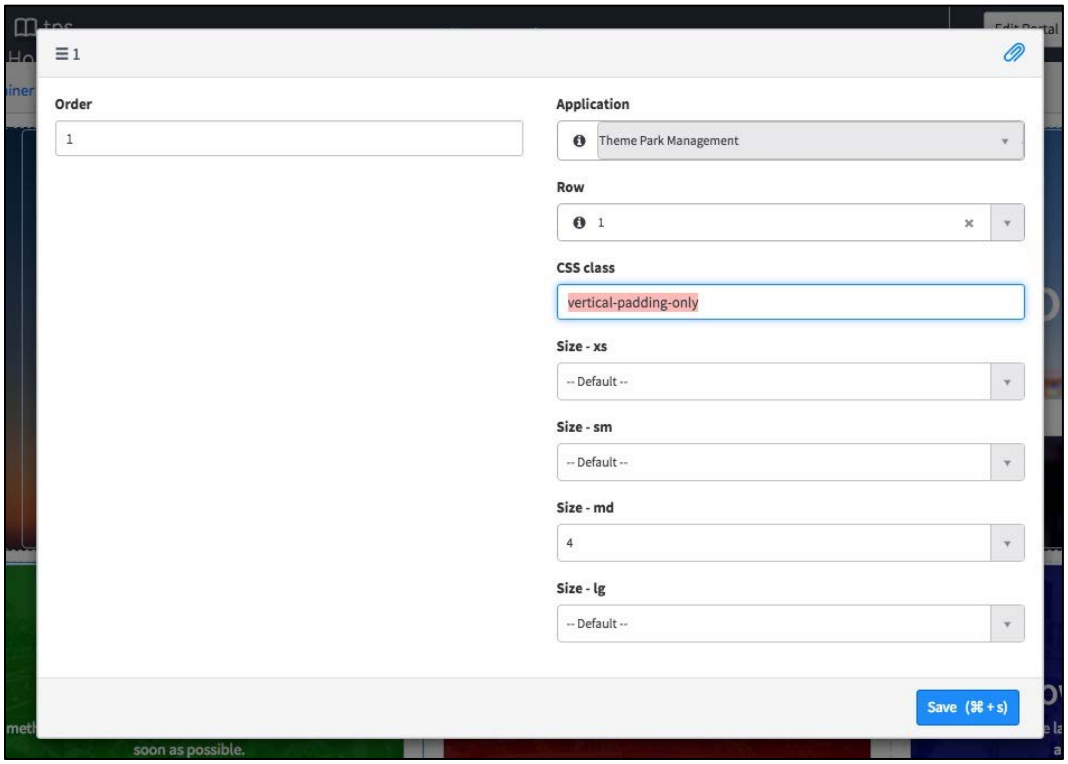
Left Tile Link	Middle Tile Link	Right Tile Link
Background image: report_incident.jpg **Title**: Report an issue **Short Description**: Something broken? Report an issue here and we'll respond as soon as possible. **Glyph**: (fa-fire) **Type**: Catalog Item **Catalog Item**: Report a Theme Park Issue **Page**: sc_cat_item	**Background image**: catalog.jpg **Title**: Browse the catalog **Short Description**: From Facilities to Ticketing, request services here! **Glyph**: (fa-ticket) **Type**: Page **Page**: sc_home	**Background image**: knowledge.jpg **Title**: Knowledge Base **Short Description**: Check out the latest policies, procedures and other announcements here. **Glyph**: (fa-book) **Type**: Page **Page**: kb_view2

8. Click the newly-placed Tile Links and, using the top Breadcrumbs, click the **Column** link.



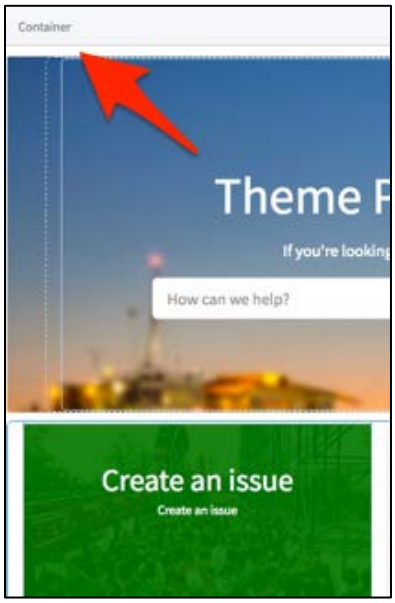
9. Click the **pencil** icon () at the top-right to bring up the Column settings. Complete the form per the example below and **repeat** for each tile column.

   CSS Class: **vertical-padding-only**



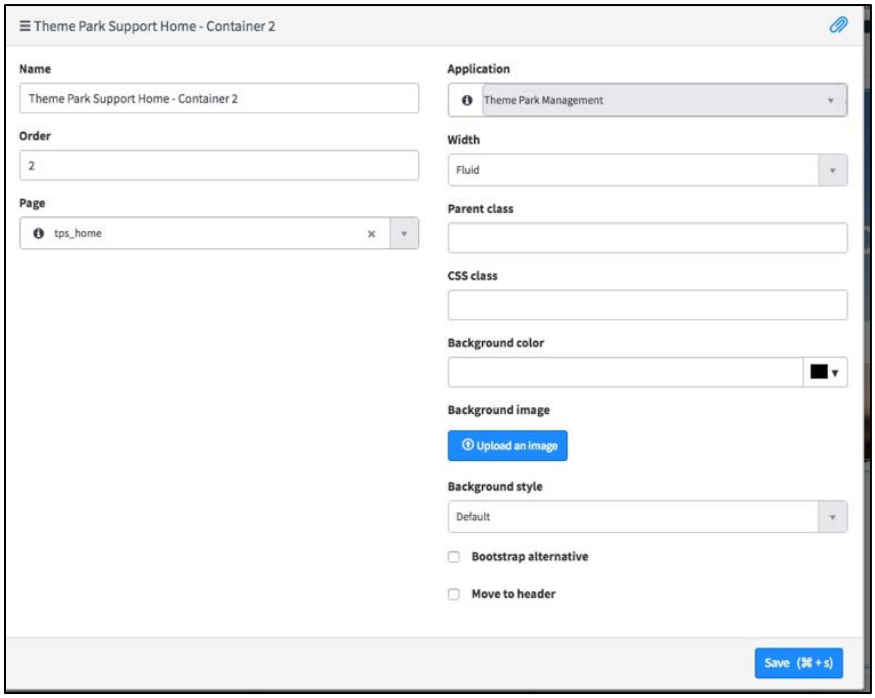
10. Click **Save.**

11. Click one of the new Tile Link widgets. Using the Breadcrumbs, select **Container**.



12. Click the **pencil** icon at the top-right to bring up the Container settings. Complete the form per the example below.

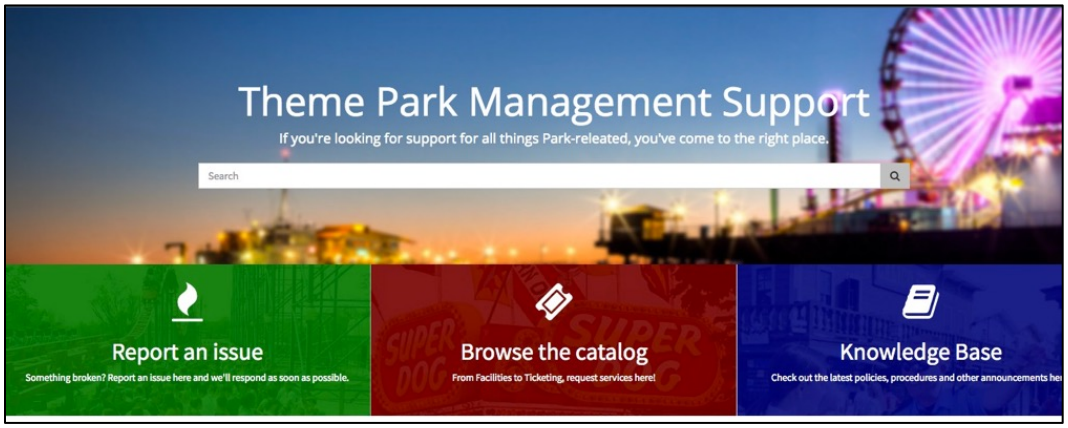
    Width: Fluid



13. You should now have three Tile Link widgets that span the entire row, all positioned below the Search bar widget.



14. At the top of the page, click **Preview** to view the progress of the page so far.



15. Click **Edit** to reenter Edit mode. Do not close the Page Designer tab.

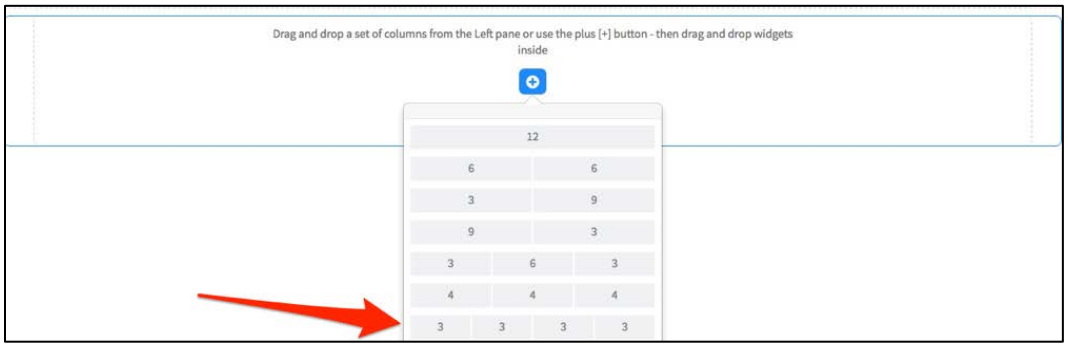
Lab Goal

Many different types of widgets can be placed on pages to give users different ways to visualize data. In this lab, you add a series of simple counter widgets to the home page to give users a count of issues and other relevant data.

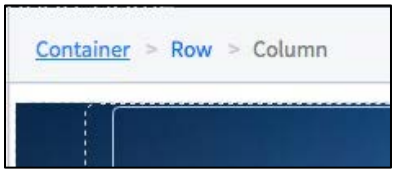
Lab 1.5
Add Record Counter Widgets

Add Record Count Widgets

1. Directly under the previous container that contains the Tile Link widgets, drag another **container**. Click the **+ (plus)** and add a **4-column** layout.

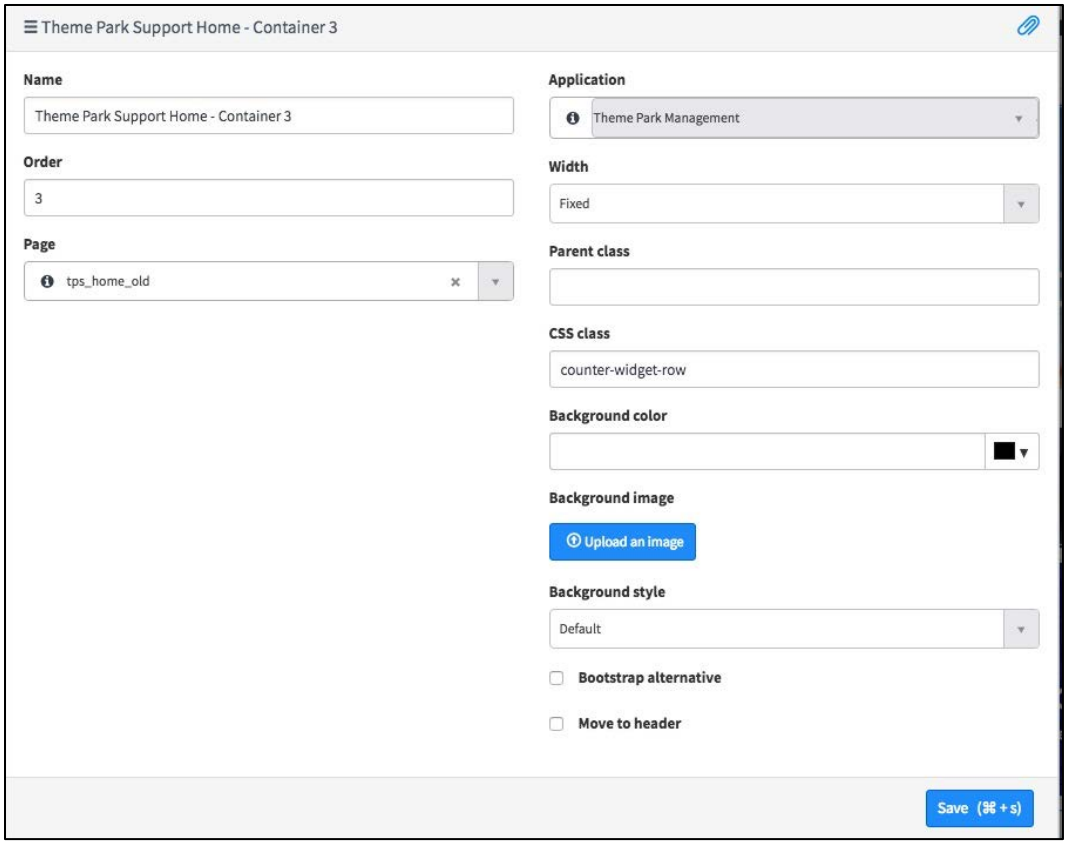


2. Click into the **Container** and, using the Breadcrumbs above, select the **Container** that was just placed.



3. Click the **pencil** icon at the top right ( ) to bring up the Container settings. Complete the form per the screenshot below.

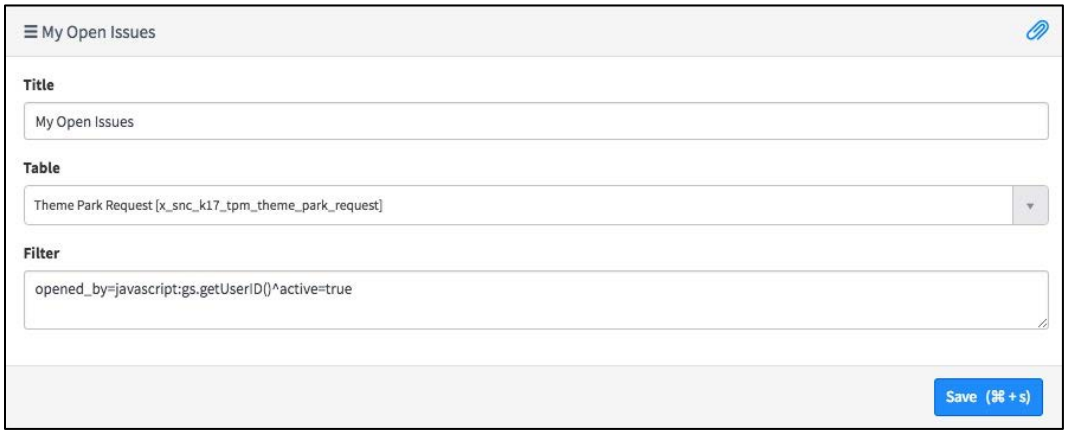
   CSS Class: **counter-widget-row**



4. Click **Save.**

5. For each of the columns in the new empty container, drag a **Record Counter** widget into the column.

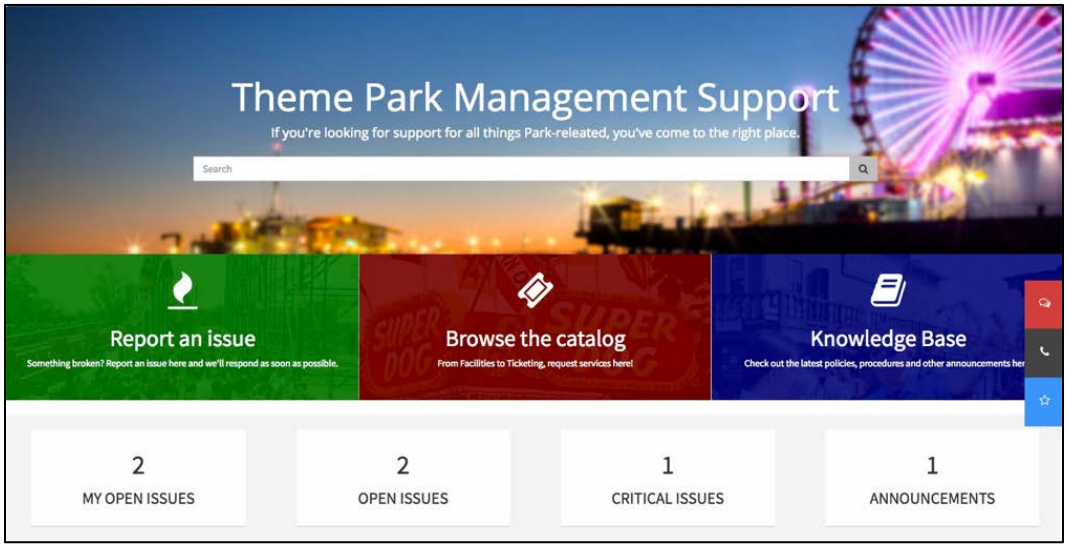
6. Hover over each of the newly-added Record Counter widgets. Click the blue **pencil** icon () on each to configure the widgets. Using the table below as a guide, configure each field in the widget with the values listed.



Title: **My Open Issues** Table: **Theme Park Request** Filter: **opened_by=javascript:gs.getUserID()^active=true**
Title: **All Open Issues** Table: **Theme Park Request** Filter: **active=true**

Title: **Critical Issues** Table: **Theme Park Request** Filter: **priority=1**
Title: **Announcements** Table: **Knowledge [kb_knowledge]** Filter: **kb_category=fa461d9cd4ca32007f44c8341d4d3be9^workflow_state=published^kb_knowledge_base=a034dacd4f753a40bf0ecfce0310c776**

7. With each widget configured, and the container given a CSS class, return to the Designer and Preview the page to see the results so far. Do **not close** the Designer tab.



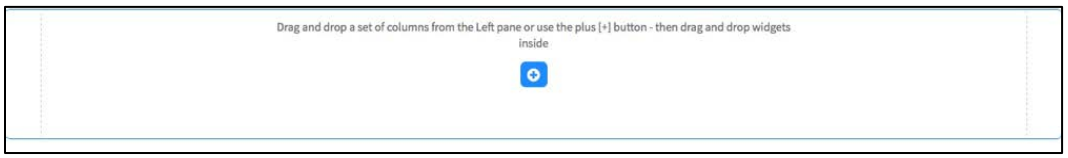
Lab Goal

Simple List widgets are an easy way to let users view lists of data. This powerful out-of-the-box widget can be placed on any page to let users see lists of data such as incidents, requests and Knowledge articles. Clicking on list elements can redirect users to a page containing the record they clicked.

Lab 1.6
Add Simple List Widgets

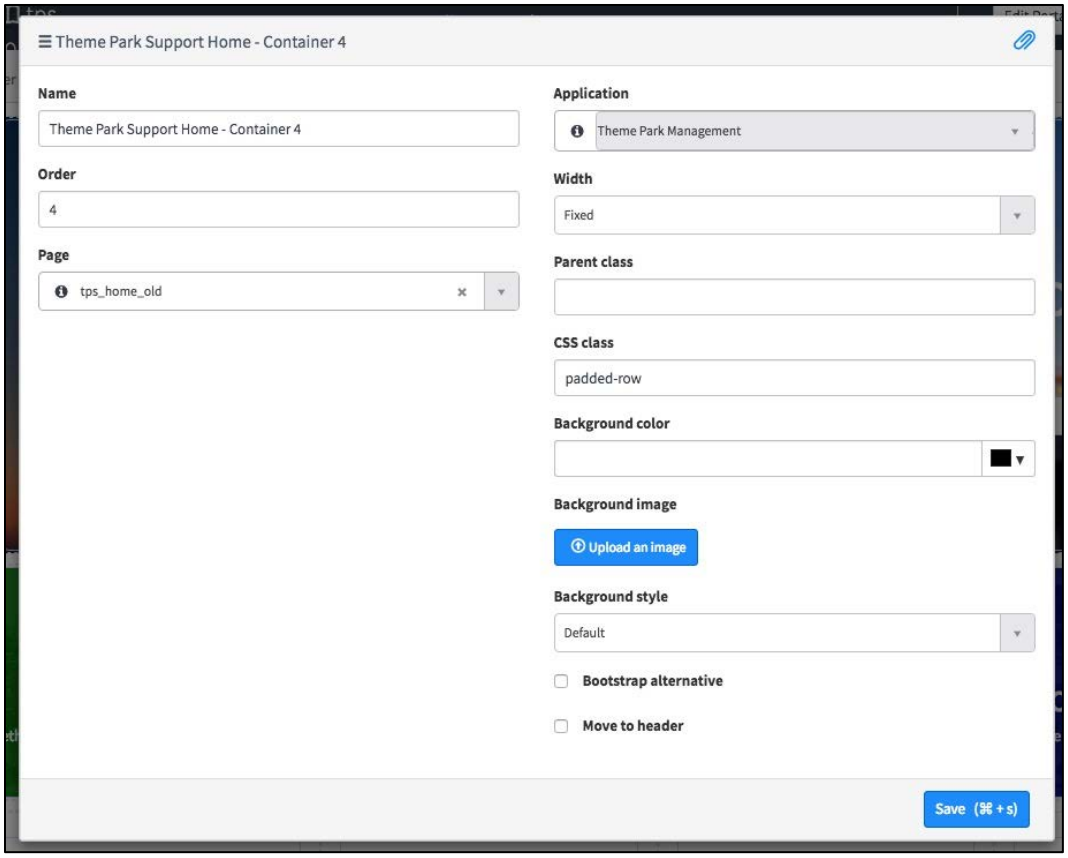
Add Simple List Widgets

1. Drag a new **container** directly under the previous container that contains the **Record Counter** widgets.



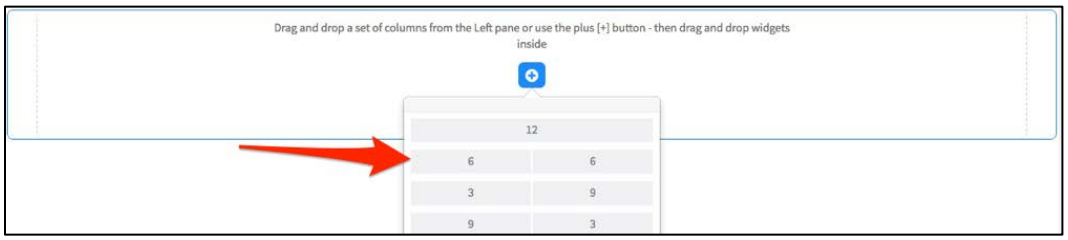
2. Click the empty container to select it, and then click the **pencil** icon ( ) at the top-right of the canvas to bring up the Container settings. Complete the form per the example below.

   CSS Class: padded-row

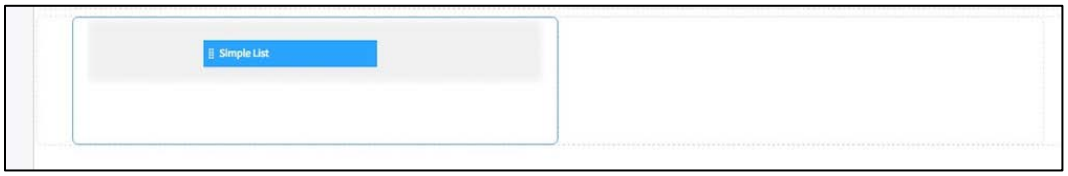


3. Click **Save.**

4. Click the **+** (plus) inside the empty container to add a **two-column** layout.



5. From the Widget list, drag a **Simple List** widget to each of the columns in the new container.



6. Hover over one of the empty Simple Lists and click the blue **pencil** icon ( ) to bring up that widget's settings page.



7. Using the table below as a guide, complete the properties for both Simple Lists. Here is an example. Scroll down to copy/paste the values from the next page.

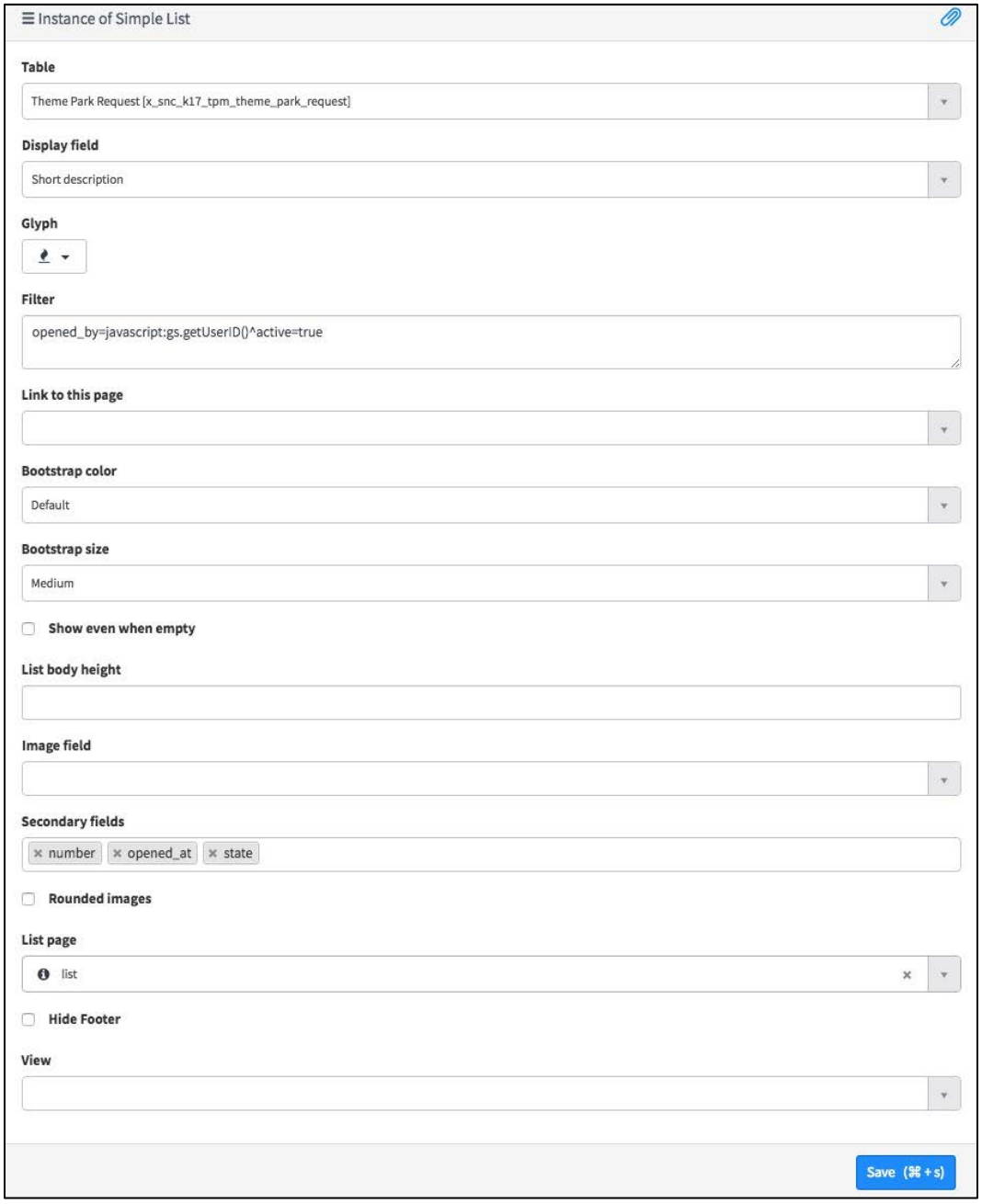


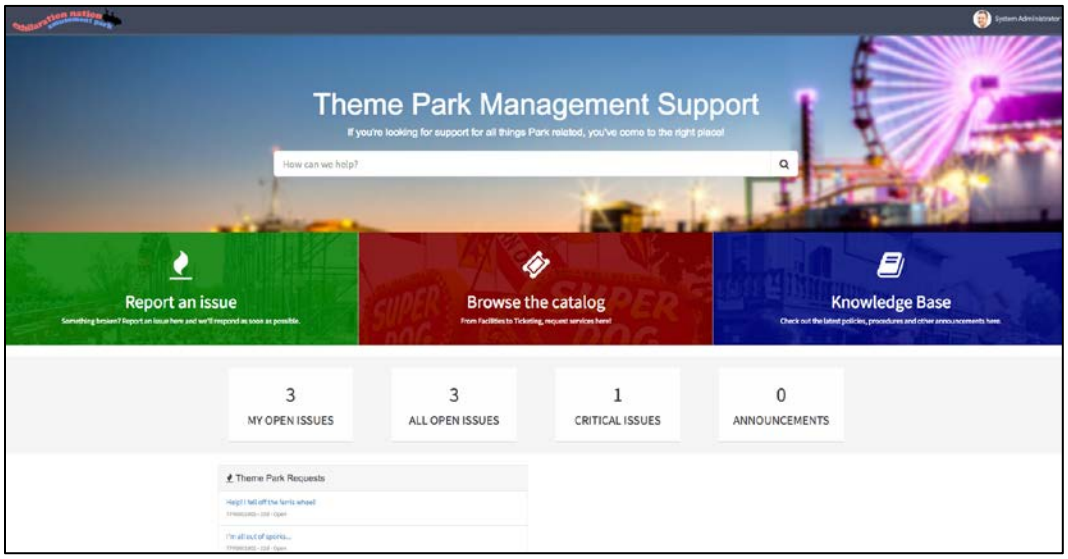
Table: **Theme Park Request** Display field: **Short description** Glyph: **(fa-fire)** Filter: **opened_by=javascript:gs.getUserID()^active=true** Link to this page: **ticket** Secondary fields: **Number (number), Opened (opened_at), State (state)** List page: **list**
Table: **Knowledge** Display field: **Short description** Glyph: **(fa-question)** Filter: **kb_category=fa461d9cd4ca32007f44c8341d4d3be9^workflow_state=published^kb_knowledge_base=a034dacd4f753a40bf0ecfce0310c776** Link to this page: **kb_article** Secondary fields: **Published (published), Category(category)**

8. Click **Save** for each widget.
9. Leaving the Designer tab open, navigate back to the **Platform/Native ServiceNow** UI.
10. Navigate to **Theme Park Management > Theme Park Requests**.

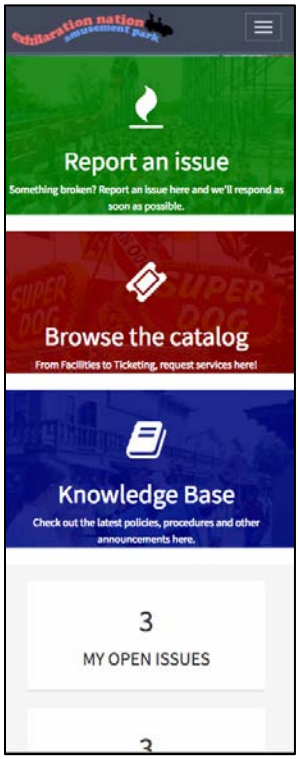


11. Create a new Theme Park Request. Do **not** set the request to a closure state.
12. Navigate back to the Page Designer. At the top of the page, click **Preview**.

13. View the new portal in the designer or open the portal via URL (yourLabInstance.service-now.com/**tps**) or click the **arrow** located beside the **Edit Page Properties** button (make sure your browser allows opening a pop-up, otherwise you will have to allow this first).



14. Click the device icons in the top-right (). View how the portal now responds to device sizes.



Lab Goal

The previous labs focused on how to create a new portal, and configure pages and widgets. The Theme Park Portal now exists; however, it is currently not integrated into the enterprise wide portal domain. The next step is about leveraging the **Cross-Portal Header** that has been created for this lab, which spans across all company portals.

Lab 2.1
Modify the TPS Theme

Add the Cross Portal Header

1. Navigate to the **Theme Park Management Theme** by using the **Themes** menu in the **Service Portal** application (**Service Portal > Themes** via the Platform/Native UI).

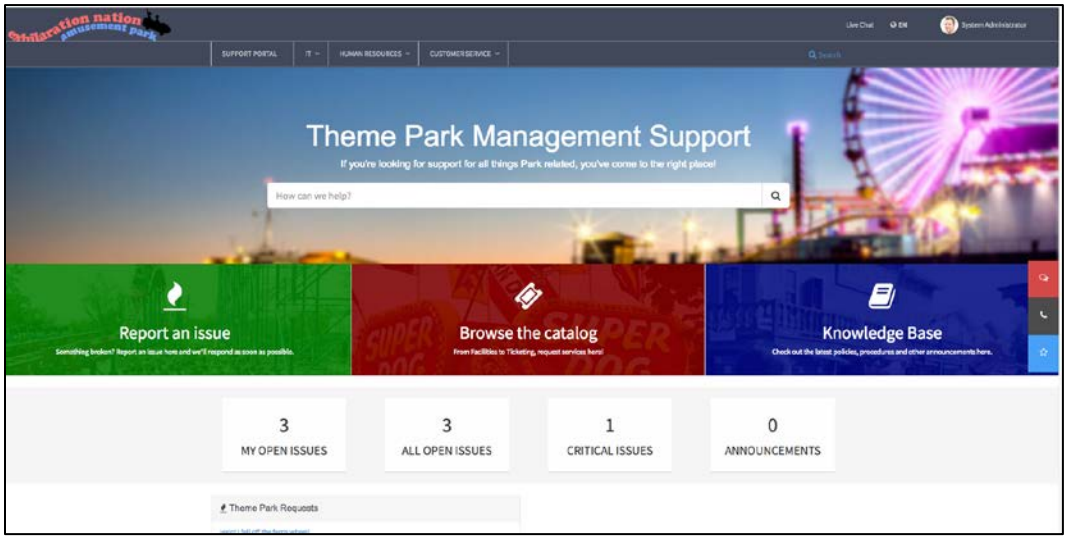
2. Replace the **Stock Header** with the **Cross Portal Header**.

3. Navigate back to a browser tab, in which your **Theme Park Portal** is already open or open a new one (i.e., via URL).

4. Open the Portal by adding the portal suffix to your lab instance URL (i.e., yourlabInstance.service-now.com/**tps**) or by going to the Portal record in the Platform UI/native UI and clicking **Try It.**

Lab Success Verification

The Theme Park Management Portal now leverages the Cross Portal Header. When opening the portal, notice that the header shows all other active domains (IT, HR, and CSM) as well as the main support portal. There is also a language picker for all active languages as well as a sticky side button menu (sticky as in the menu always stays in place, even when the user scrolls).



Lab Goal

Now that the header is already in place, the Theme Park Management Portal needs to be added as a new shared services domain, so that it will show up in all other company portals.

Lab 2.2
Add the TPS Portal to the Domain Table

Add the Theme Park Portal to the Support Domains

1. Navigate to **Support Portal > Support Portal Domains** and click **New.**

2. Fill out the form with the following values:

   Name: **Theme Park Support**
   Abbreviated Name: **TP**
   Order: **400**
   Active: **checked**
   Background Image: **tps-background.jpg**
   Portal: **Theme Park Support**
   Glyph: **fa-ticket**
   Glyph Background Color: **#5EC658**
   Description: **Do you have any Theme Park related request or an issue? Use our brand-new Theme Park Support Portal!**
   Record Detail Page: **ticket**
   Table: **Theme Park Request**
   Conditions: filter for **Opened By is (dynamic) Me**

3. Click **Submit** and navigate back to the record or do a right-click in the form header and press **Save**.

4. There are two related lists at the bottom of the newly created record.
   Hint: they only appear once the record is created; saving or submitting is mandatory.

5. The Featured Items and/or KB Articles lists can be used to display certain catalog items or knowledge articles in the Cross-Portal Header Mega Menu.

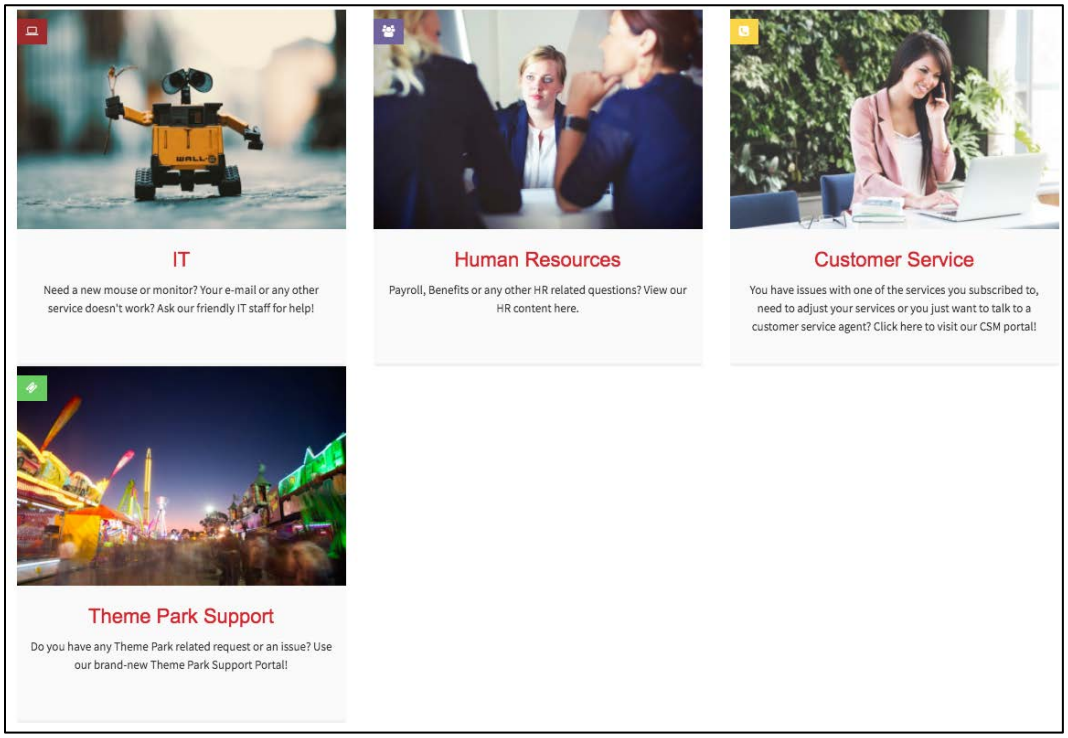
6. Click **New** in the Catalog Related List (**Featured Catalog Items in this Portal**).

7. Search for **Order food items**, define an **Order** of 100, check the **Active** checkbox and click **Submit**.

8. Open the **Support Portal** by either navigating there directly via URL (**/support**) or by navigating to the portal record of the **Support Portal** and clicking **Try It**.

Lab Success Verification

1. The Shared Services Portal was already configured to show the IT, HR & CSM portals. After adding the Theme Park Portal to the Support Portal Domain table, the domain tiles on the Support Portal should now look like this:



2. The Mega Menu should now include the featured **Order food** item.

