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Lab Guide

Content Management System 101: From Design to Development

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Lab instance: https://**<<name>>**.lab.service-now.com

Login / Passwords:

admin / Knowledge14

itil / Knowledge14

employee / Knowledge14

What is CMS?

A Content Management System, or **CMS**, is the set of processes and technologies that support the collection, managing, and publishing of information in any form or medium.



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A Content Management System (CMS) is an application that allows publishing, editing, and modifying content as well as maintenance from a central interface. These systems provide procedures that manage workflow in a collaborative environment. The procedures can be manual steps or an automated cascade.

The first CMS was announced at the end of the 1990s. It was designed to simplify the complex task of writing numerous versions of code and to make the website development process more flexible. CMS platforms allow users to centralize data editing, publishing, and modification on a single back-end interface.

Popular CMSs include Drupal, Joomla, Wordpress, and Mambo, to mention a few.

Contents

CMS Overview

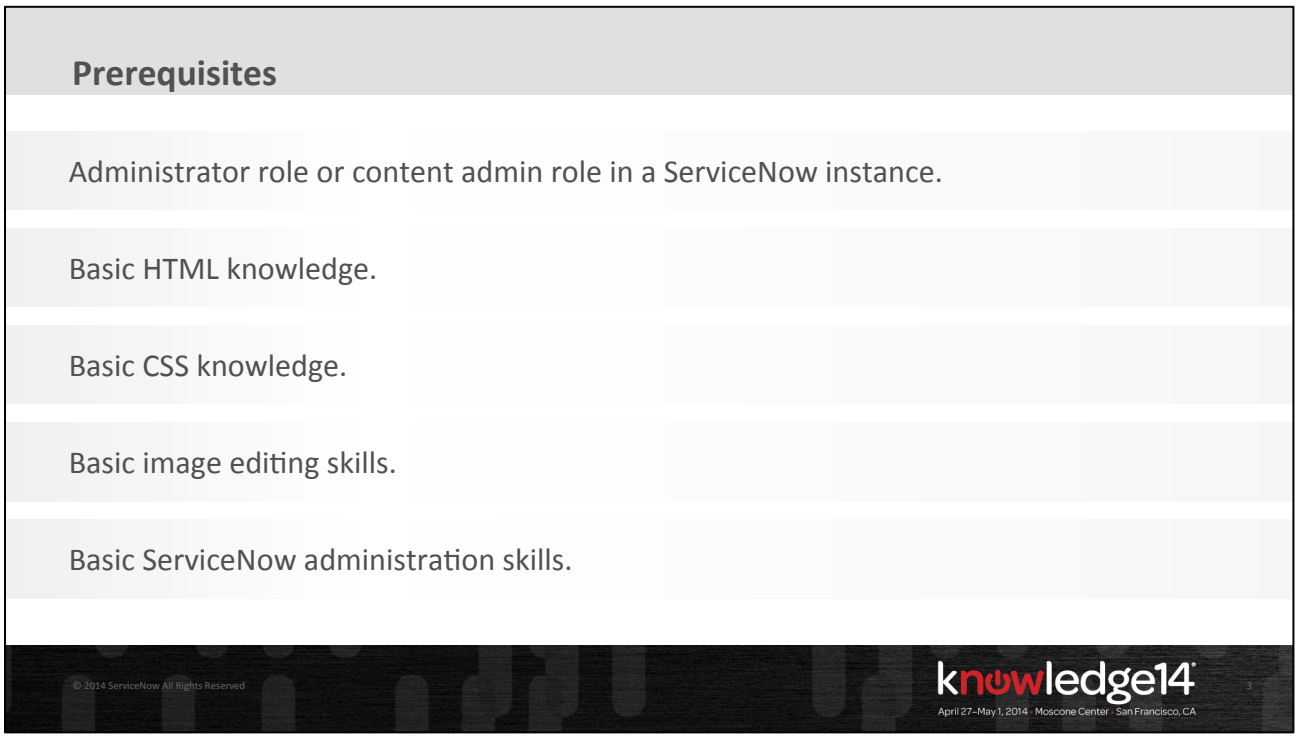
Lab 1 Change Company Logo

Lab 2 Add New Site Page – “Schedule a Relocation”

Lab 3 Add New Category - “Can We Help You?”

Lab 4 Bonus Lab - Add Chat to Portal

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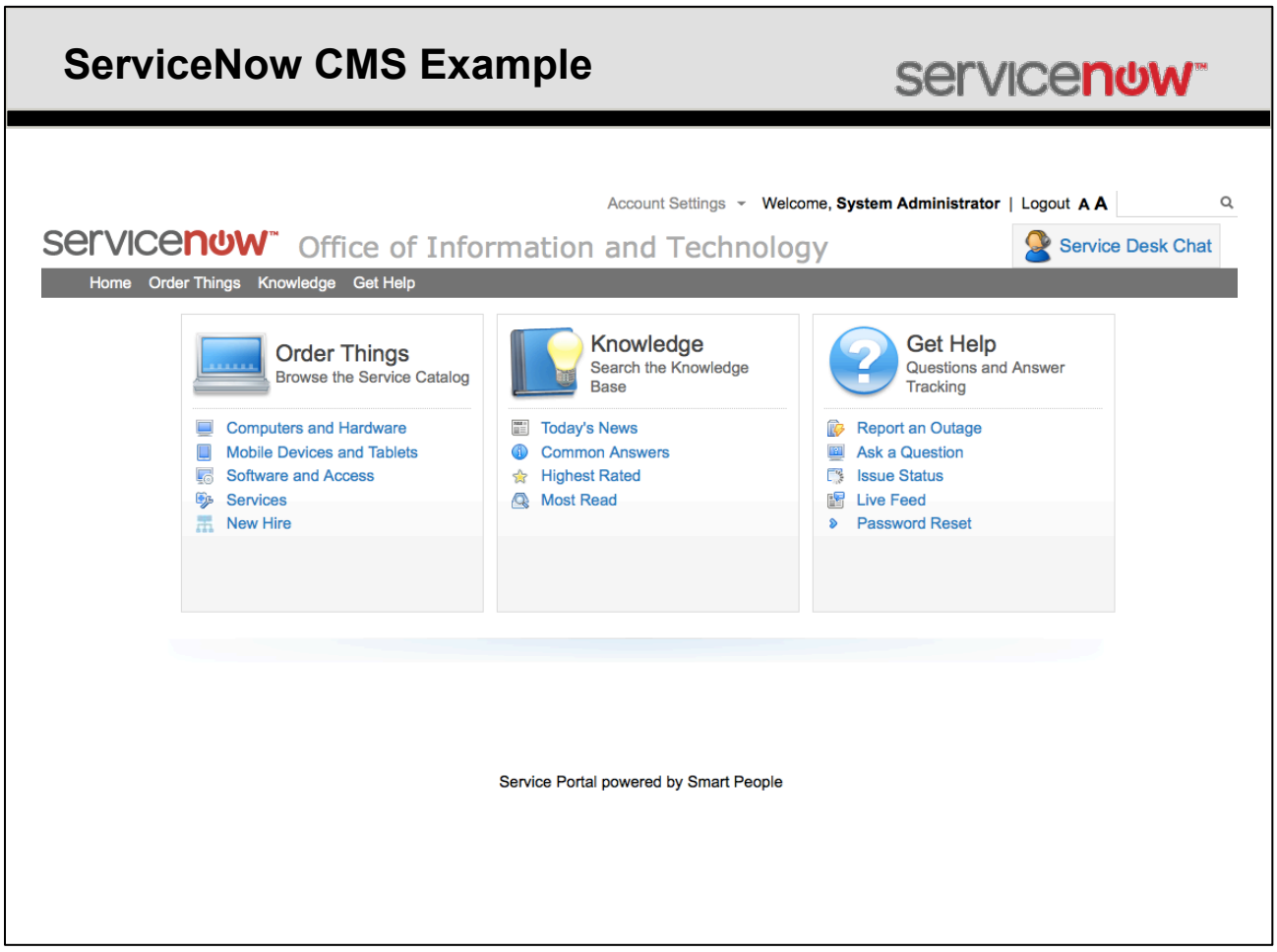


This lab uses some basic Cascading Style Sheet (CSS) procedures. Though you won't write any CSS scripts, you should be familiar with how to interpret and read and these types of scripts.

This lab also assumes knowledge of the basics used to navigate the ServiceNow administration screens and functions.

In the lab, we use ServiceNow training instances to create a new site and copy some existing Employee Self Service (ESS) Portal pages and make minor modifications to the header, content section, and footer.

ServiceNow CMS Example



The ServiceNow CMS application enables users to create a custom interface for the ServiceNow platform and ServiceNow applications.

The CMS application is powerful and flexible; customers have used it for a variety of projects that include creating entire websites as well as integrating with other products. The CMS application comes with the base ServiceNow instance.

A CMS typically requires a systems administrator or a web developer to set up and add features, but nontechnical users can use the application as a website maintenance tool to make changes to a website.

CMS Architecture

- Sites
  - One SN instance can host many sites
- Pages
  - Exist within their parent site record.
- Content Blocks
  - Make up the sites
  - Can be used by multiple pages
- Style Elements
  - Themes
  - Layouts
  - Images



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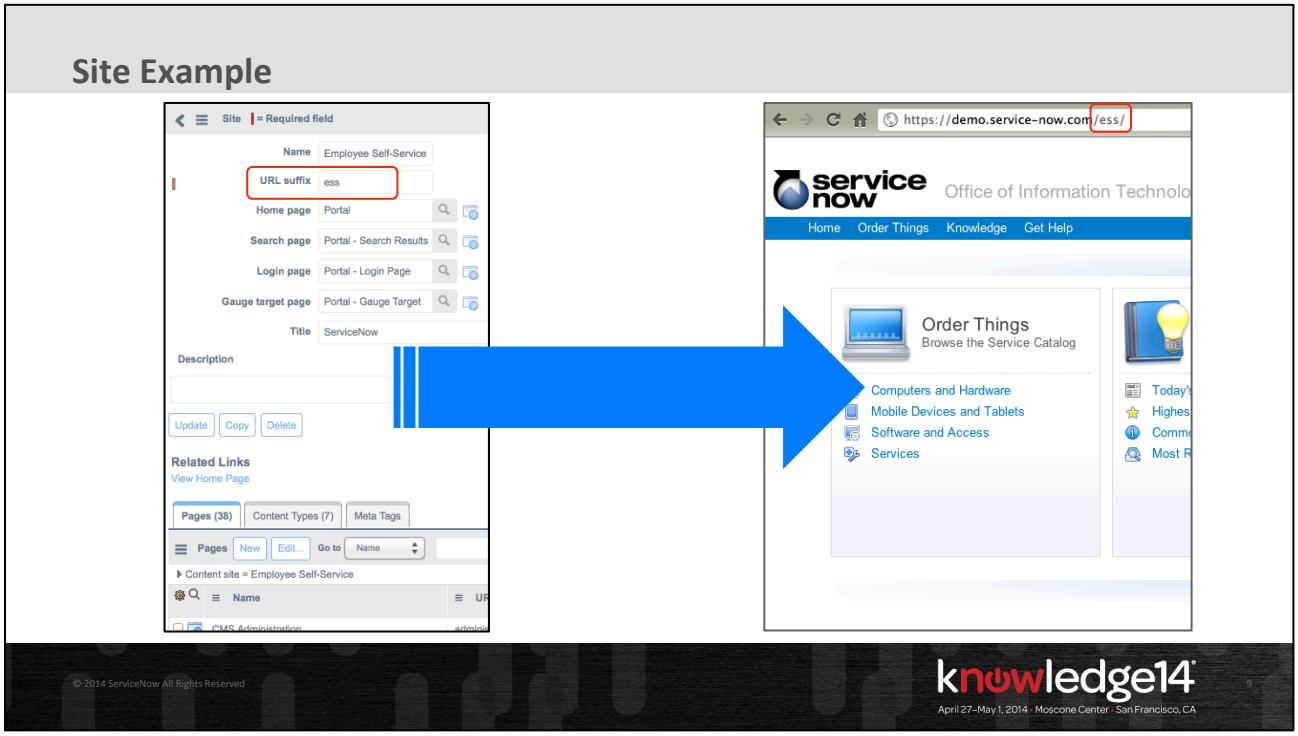
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A ServiceNow a single instance can contain multiple CMS Sites. A company may require different portals for different user types or business units within the organization.

Users can be directed to a specific portal or page, based on login rules.

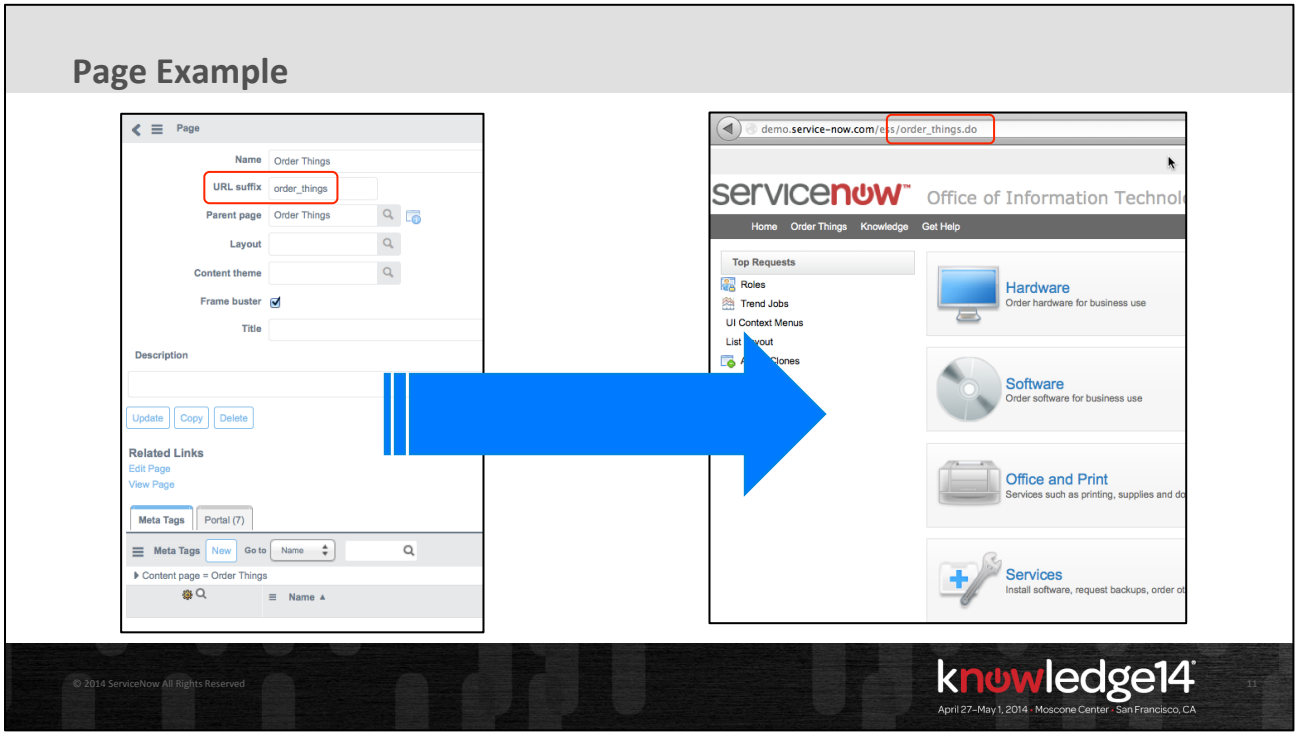
The record for a CMS site is the parent record for all of the pages within the site. This is where the URL for the CMS site is recorded. For example, the Employee Self-Service site would have a URL suffix of **ess**. In order to navigate to the portal, enter the instance URL followed by '**/**' and the URL suffix, as shown in the example:

https://yourinstancename.service-now.com**/ess**



Also recorded on the site record is the default layout and default CSS theme for the site.

Standard base pages are recorded on the site record (search, home, login); the remaining site pages are recorded on a related list. These pages have a parent/child relationship with the parent site record.



Pages can have various embedded content types. Pages typically contain a header, footer, navigation menu, and a main content area.

ServiceNow content areas are typically defined as dropzones (for example, **dropzone0**, **dropzone10**, **dropzone20**). Dropzones are defined in the layout page and styled in the CSS theme.

CMS Architecture – Content Blocks

- Basic Types
- Headers / Footers
  - Menus
  - Lists
  - iFranes



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Content types include (but are not limited to):

- Dynamic content
- Static HTML
- Headers
- Footers
- IFrames
- Lists
- Horizontal Block Menus
- Super Menus
- Tab Content Menus
- Vertical Blocks
- Vertical Lists
- Flash Content

Top Takeaways

1. CMS is not that hard.
2. Remember. It's just parent/child relationships.
3. Create content once. Re-use it across your site.

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Lab Goal

This lab uses explains how requesters can interact with the Self Service Portal rather than the standard application UI. To make sure that requesters know they are at the right page, this lab also explains how to modify the out-of-box portal, including a specialized logo.

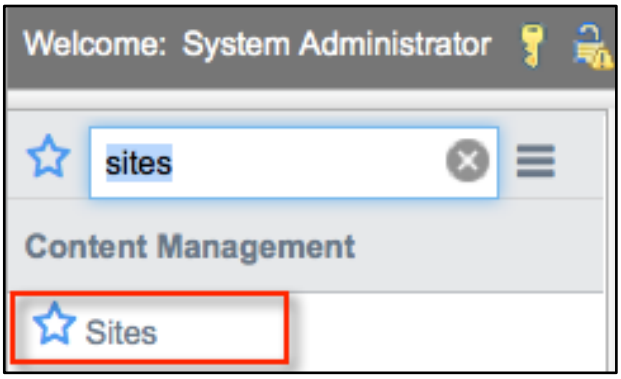
Lab 1
Change Logo

Log on to Your Training Instance.

1. Your instance URL is on the cover page.

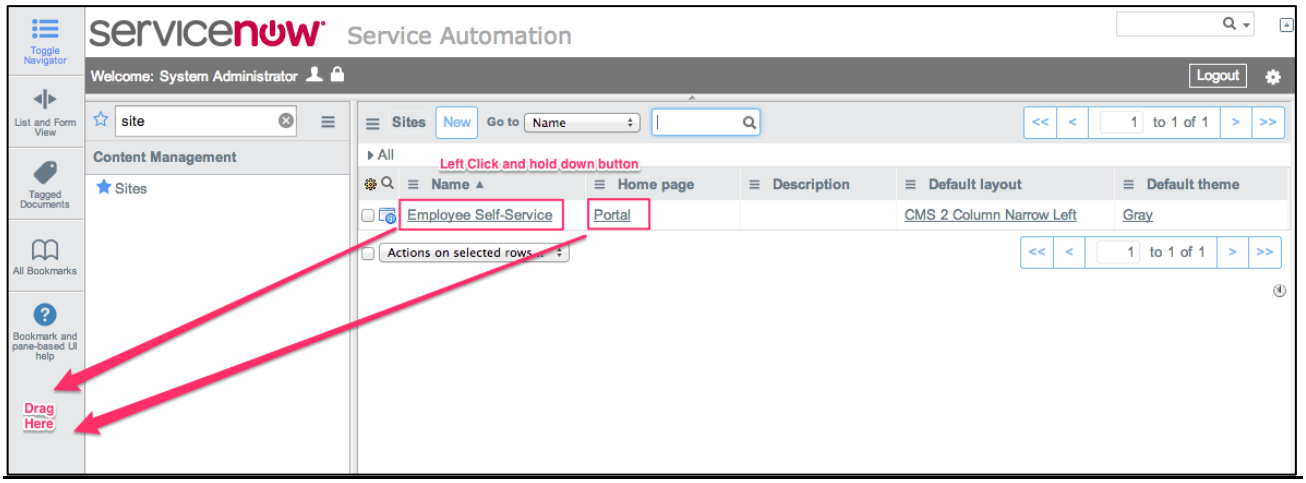
2. Login using the **admin** credentials provided on the cover.

3. Navigate to **Content Management > Sites**.

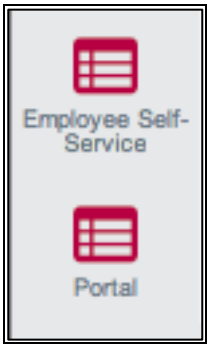


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4. This example uses the **Employee Self-Service** site record and the site's **Home** page often during the lab. To facilitate getting there quickly, create bookmarks for both locations. To create bookmarkss, left-click (and hold down the button) the **Employee Self-Service** name and drag it to the bookmark bar. Do the same for **Portal**.



Now you should have two bookmarks that will take you directly to these records.



NOTE: Subsequent labs use these two bookmarks to go to **Employee Self-Service** site record or the **Portal** page record.

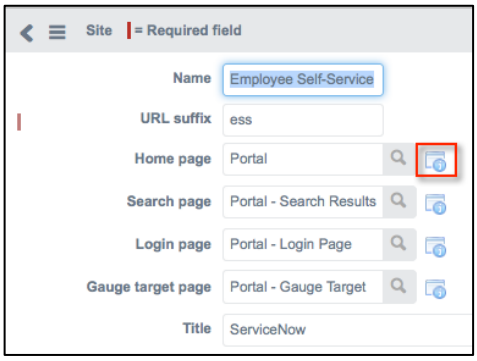
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Modify Portal Company Logo

1. Select the bookmark for the **Employee Self-Service** site record**.**

2. Window description: The site record for the **Employee Self-Service** window is the parent record for all of the content pages within the site. The site record form that you opened contains reference fields to other values, such as site layout, site theme (CSS file) and the Portal page. The Portal page is the first page displayed when a user navigates to the portal URL. At the bottom of the form is a related list that includes all the pages that exist within that particular site. Because many or all pages can use a single content section, you need only modify the content section once (i.e., the header content block is reused on all of the site pages). We modify the header with a new logo once. Each site page that uses that header displays the new logo.

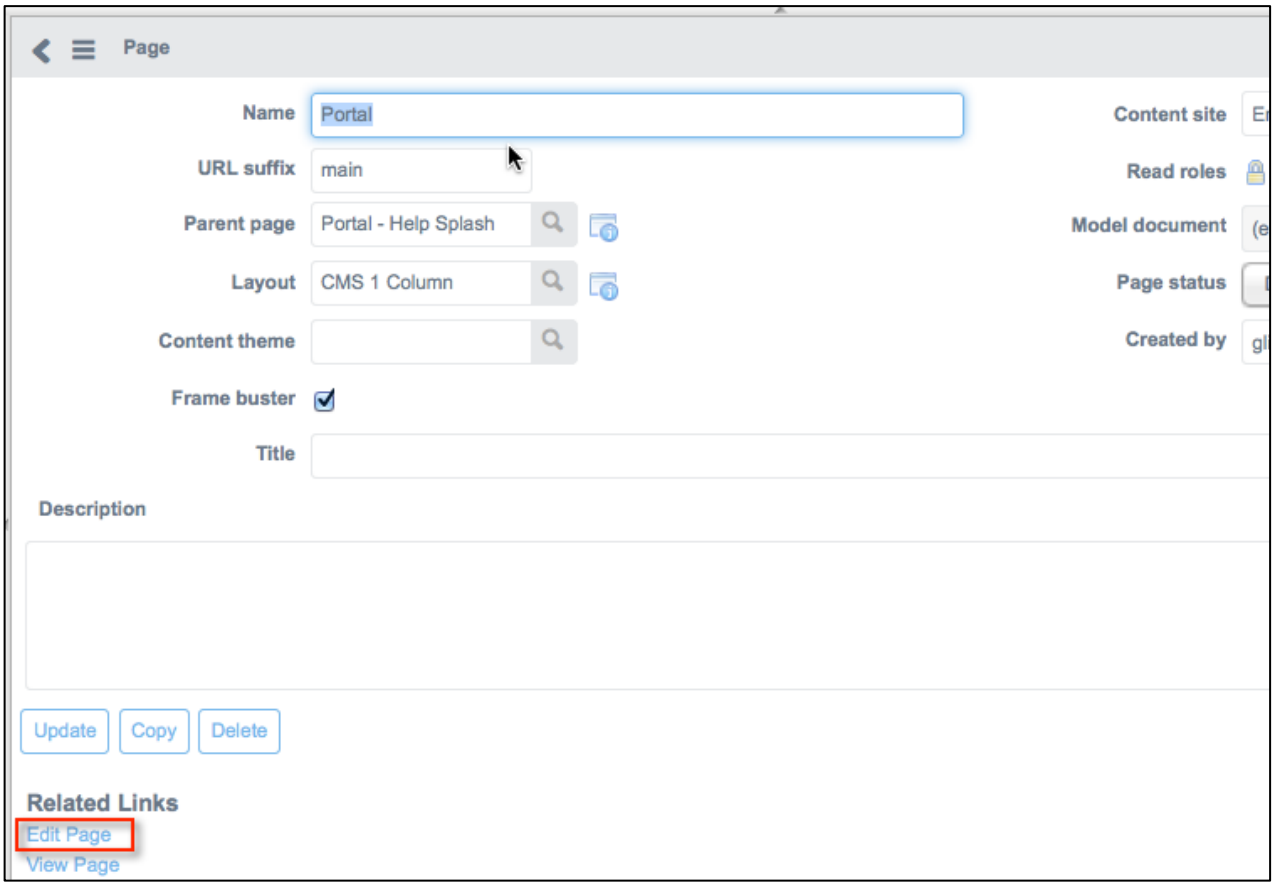
   Click the icon next to **Portal** in the **Home Page** field.



   You could have also selected the **Portal** page from the related list of pages at the bottom of the form.

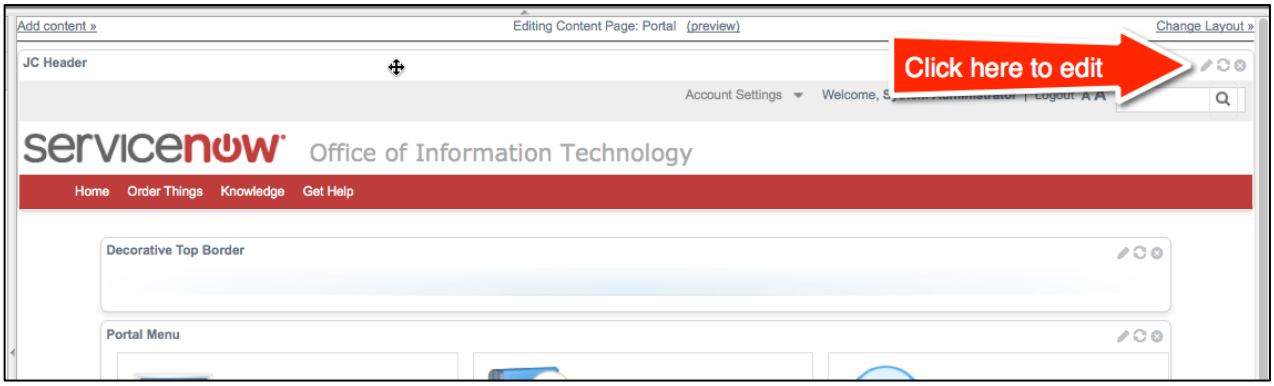
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3. The **Page** form contains fields such as **Layout** (if different from **Site Layout**) and **Content Theme**. If there is no value in the **Layout** or **Content Theme** fields, then they inherit those values from the parent site record. To modify the content of this page click the **Edit Page** link on the form.

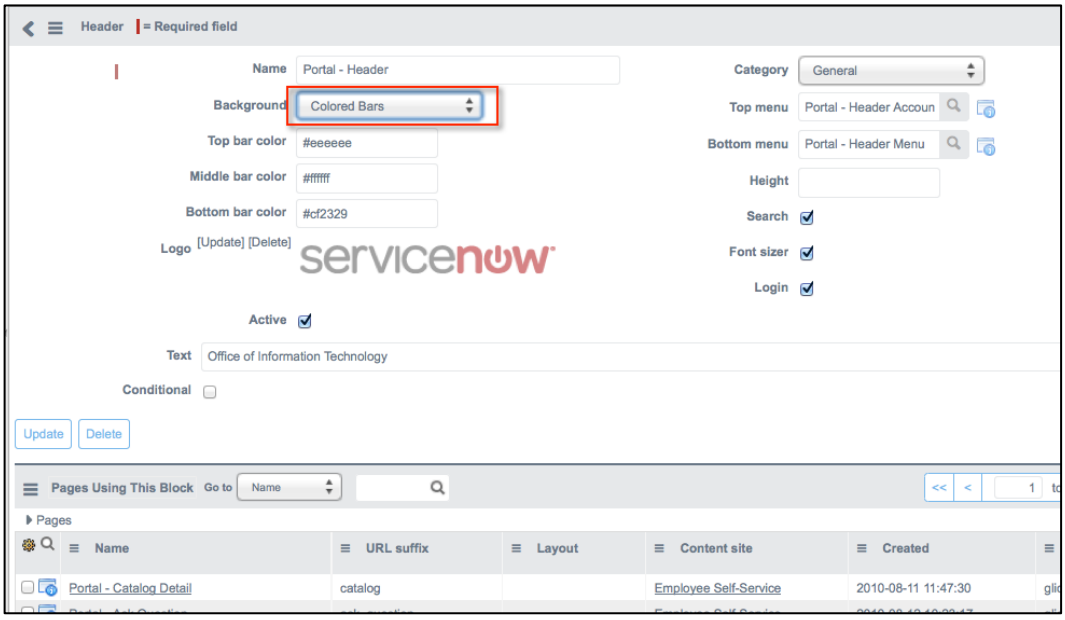


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4. The **Portal** page contains a collection of content blocks that you can add/remove/edit. To change the logo, click the **pencil icon** in the top right corner of the block to open the header content.



5. The header record opens. This form contains important information, including the logo, the banner text, the top and bottom menus, and a choice between a background image or the colored horizontal bars. There are three colored bars: a light-gray top row, a white row behind the logo and banner text, and a red row behind the main menu. Alternatively, the Background option lets you choose a background image. In this lab, leave **Background** as **Colored Bars**.



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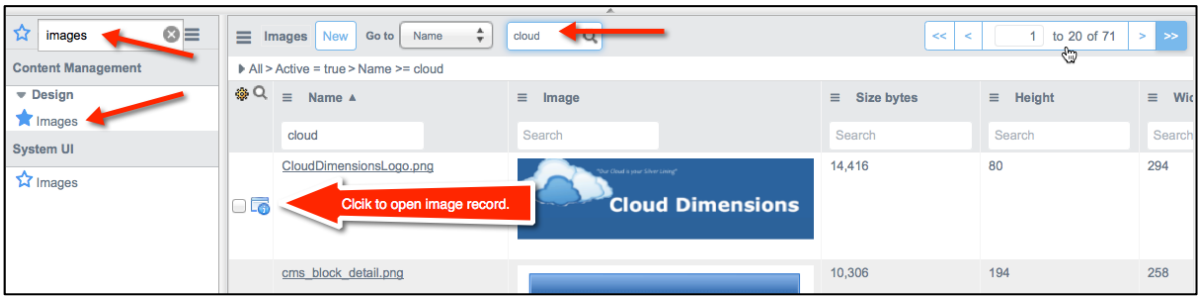
6. Follow these steps to download the **CloudDimensionsLogo.png** file from the images table (preloaded for this lab). If you are working on an instance that was not provided to you for this specific lab you can download the logo from: http://tinyurl.com/cms101-logo or you can use a logo of your choosing. For the K14 lab you can follow these steps:

   In a **new** browser tab, navigate to your lab instance.

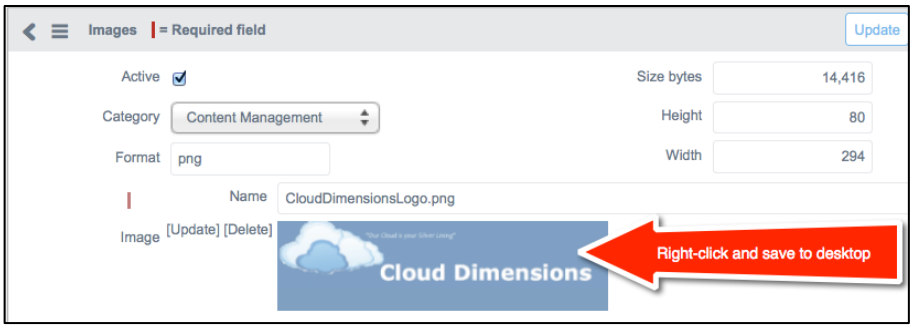
   Go to **Content Management>Images.**

   Type "cloud" into the search box and press **Enter**.

   The first image in the list will be the logo for this lab. Click the icon to open it.



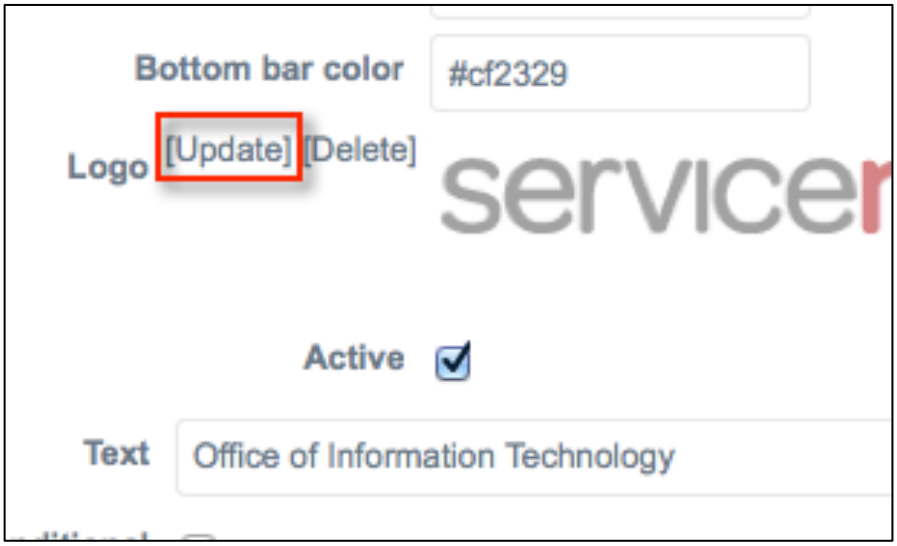
   Right-click the image and save to your desktop.



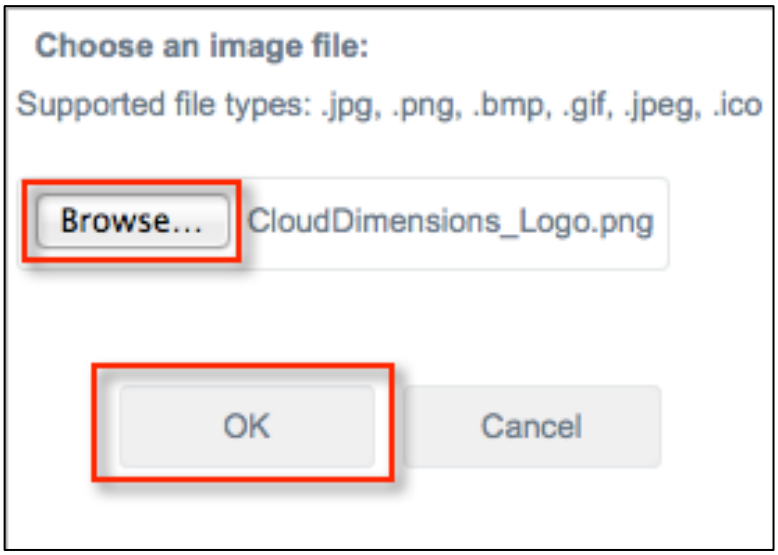
   Return to your other browser tap to continue editing the site header.

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7. On the header form link in the logo field, click **[Update]**.



8. On the next screen click **Browse** and navigate to the **CloudDimensionsLogo.png** file that you downloaded in step 6. Click **OK**.



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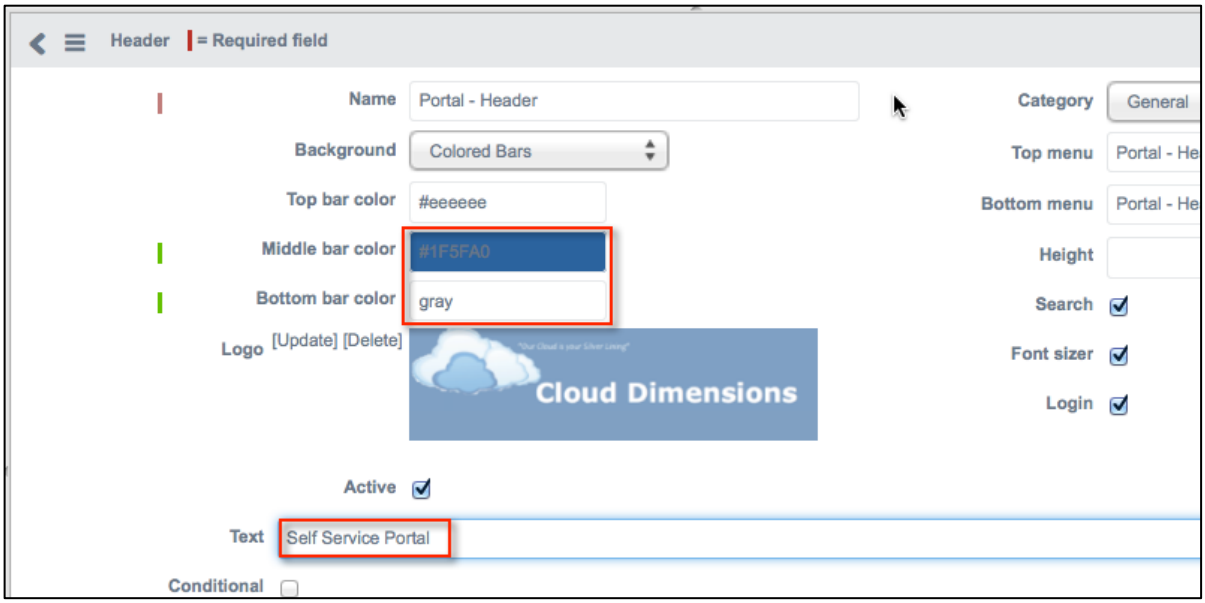
9. The header record form appears with the new logo in the place of the out-of-box ServiceNow logo. The new logo has a solid blue background; change the color value of the middle horizontal bar to match the logo background. Use standard color names such as red, blue, black, yellow. To set a precise color, use the hexadecimal value of the color. To find the hexadecimal value of a specific image use an image editor or a browser plugin such as ColorZilla.

10. Leave the **Top color bar** color unchanged. The current value is the hexadecimal value for light gray.

11. Enter the value **#1F5FA0** for the **Middle color bar** field. This matches the blue color in the logo image.

12. The **Bottom color** bar currently has the hexadecimal value for the red color in the ServiceNow logo. Replace this value with the word **gray**.

13. Enter **Self Service Portal** in the **Text** field.



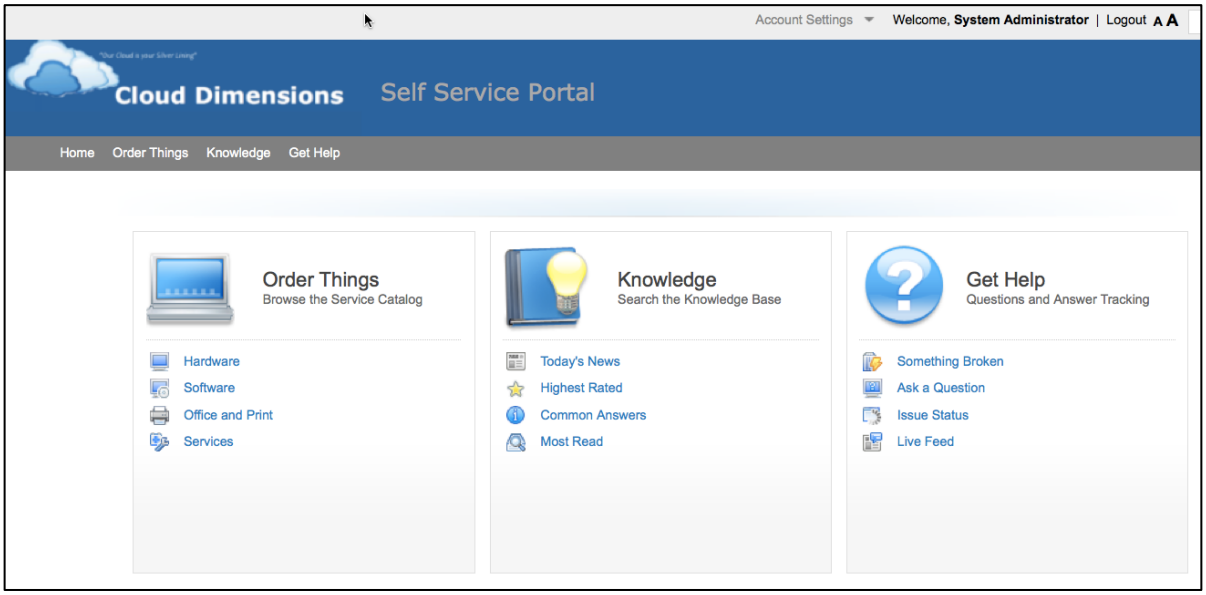
14. Click **Update**.

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Lab Success Verification

1. Navigate to **http://<YOURINSTANCE>.service-now.com/ess**

2. The screen should look like this:



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Lab Goal

This lab explains how to submit a request quickly to schedule equipment relocation. The process adds this option to the **Get Help** block menu after the **Live Feed** link.

Lab 2
Schedule Relocation Page

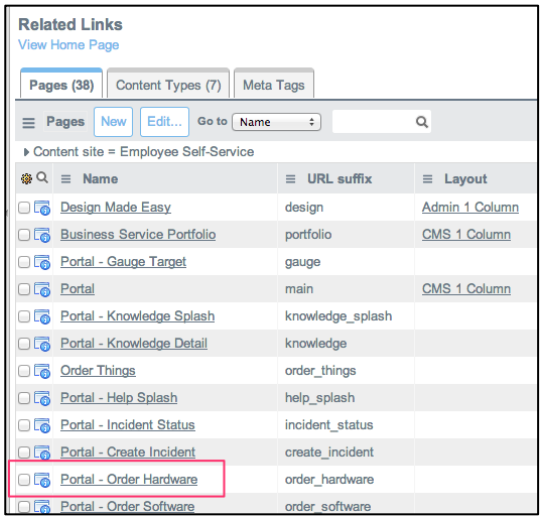
Add a New Content Page for Schedule Relocation

To add a New Content page for **Schedule Relocation** to the **Get Help** block menu, create a new content page using the **Schedule Relocation** Service Catalog item. The easiest way to do this is to use another page as a template, copy it, and make changes to the copy.

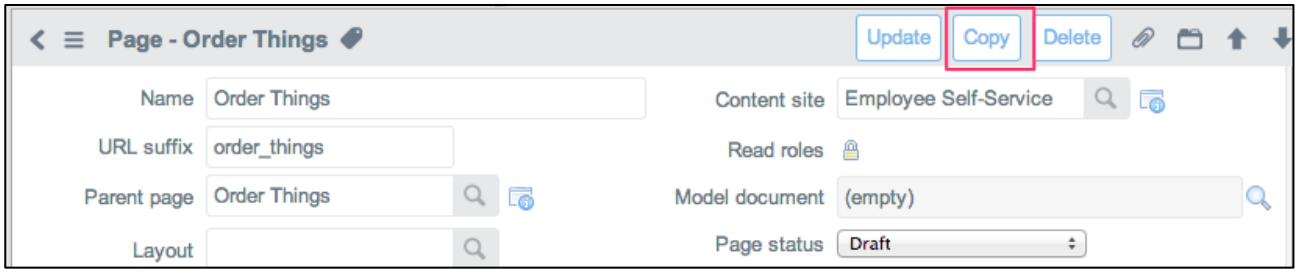
1. Select a page to use as a template. Click the **Employee Self-Service** bookmark to open the site record.

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2. Notice all the **Pages** associated with the site. Scroll down and click **Portal – Order Hardware** page to use as the **Schedule Relocation** template.



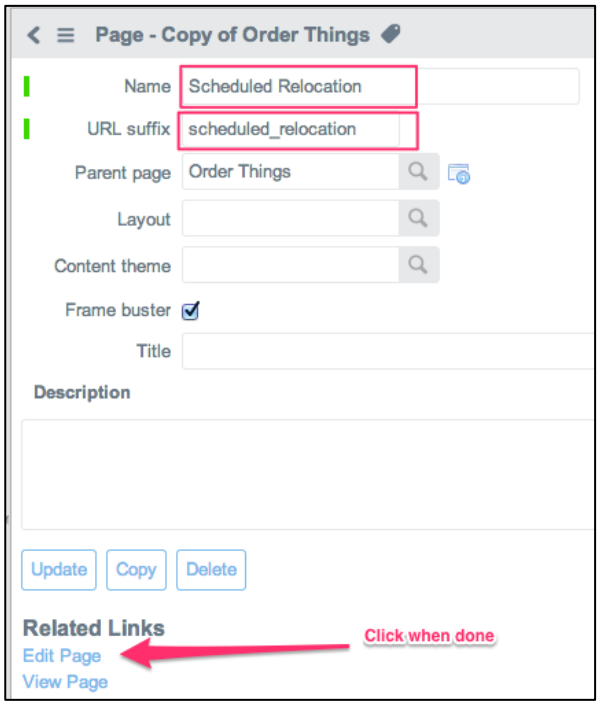
3. This page is designed for a user to order something. It is a good starting point for ordering a scheduled relocation. Content on pages are actually related records. Those functions do not copy related records; therefore, you cannot use the **Insert** or **Insert and Stay** commands to copy a page. Use the **Copy** action on the page record by clicking it to create a copy of the page.



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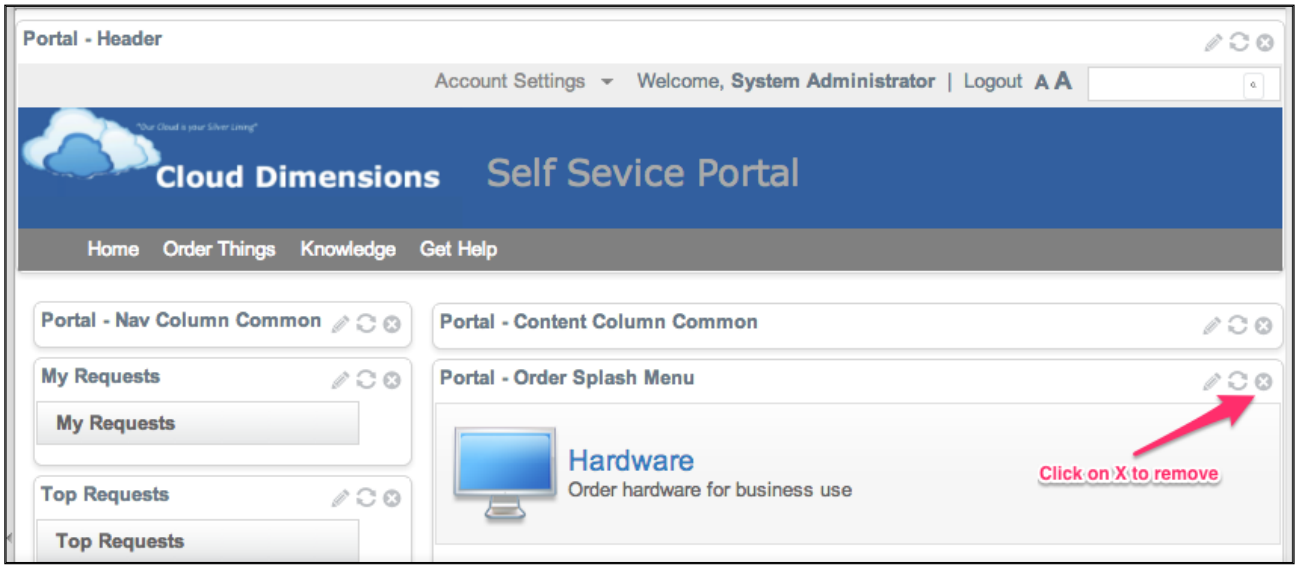
4. A new page appears. The **Name** and **URL suffix** fields contain a copy of the original input. Enter the changes below into the **Name** and **URL suffix** fields. Click **Edit Page** when done.

   Name: **Scheduled Relocation**
   URL suffix: **scheduled_relocation**

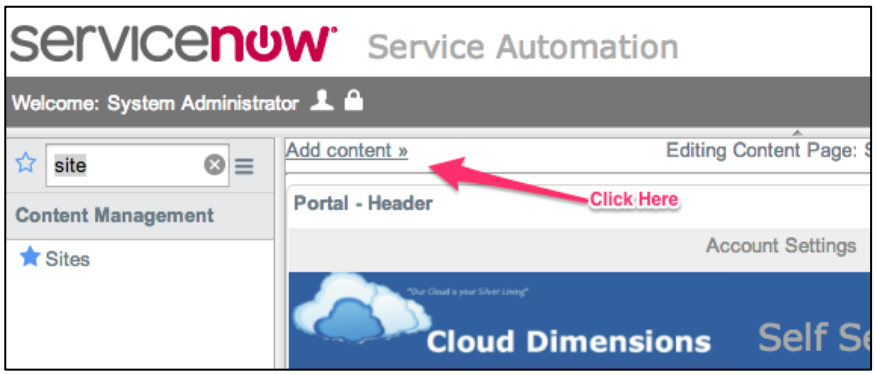


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5. Remove the **Portal – Order Splash Menu** from the page. Click the **X** to remove the block.

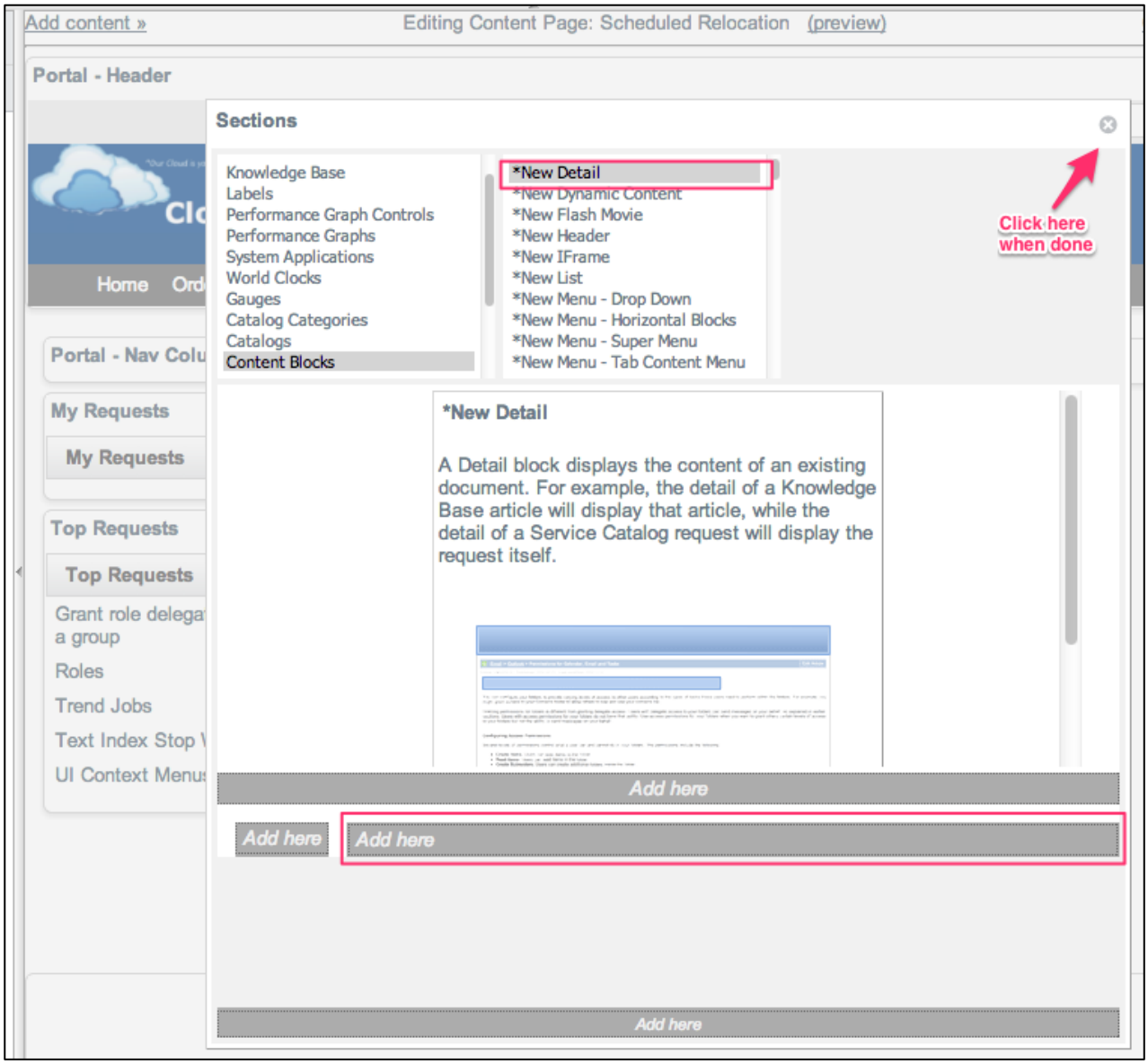


6. Add the new Content block by clicking the **Add content** link.



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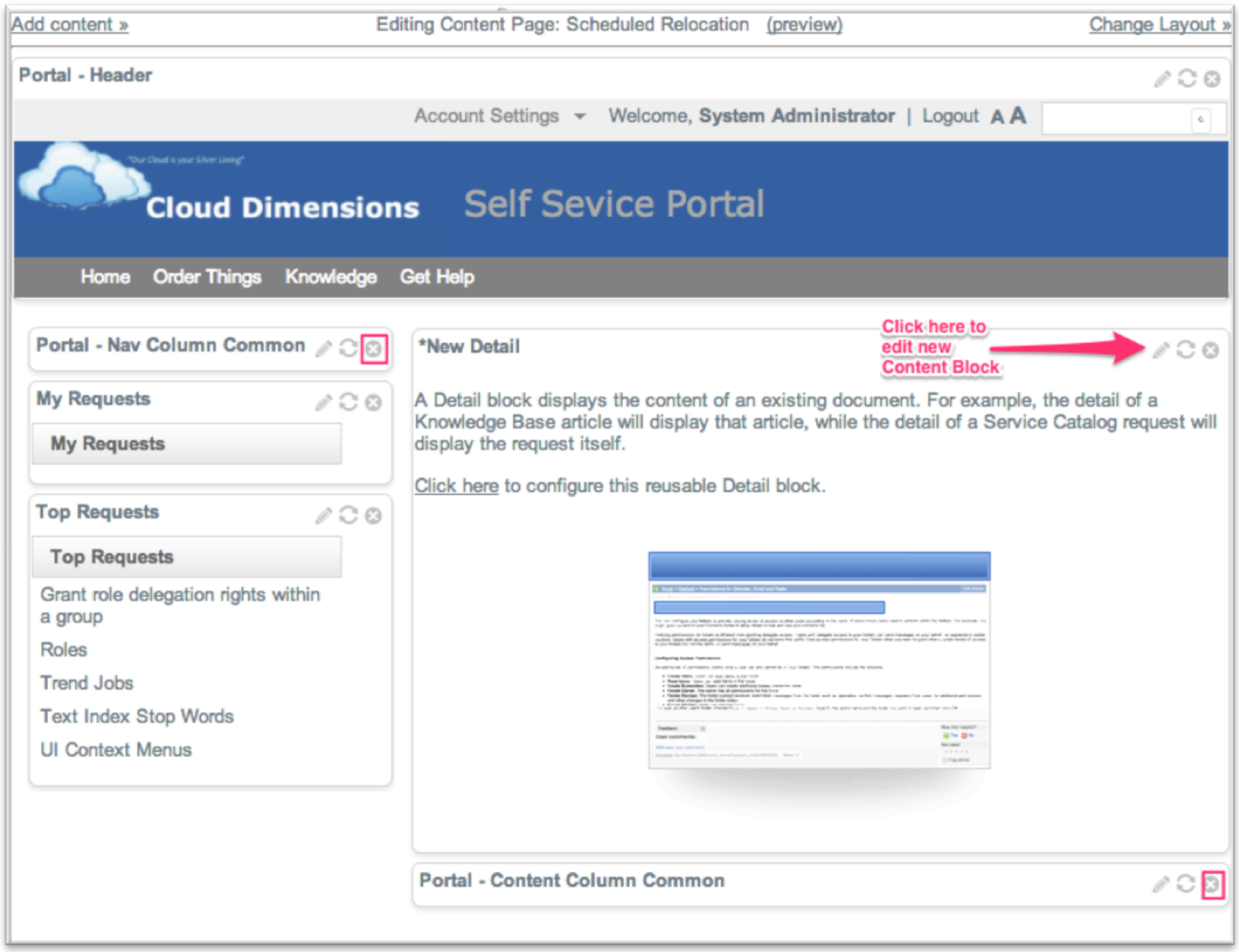
7. In the **Sections** group box**,** select **Content Blocks** and ***New Detail**. Press the **Add here** link at the bottom of the screen. Close the Sections window (click the **X** in the upper-right corner of the group box.



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8. The page should look like the example below. You can remove the **Portal – Content Column Common** and **Portal – Nav Column Common**. They are used for advanced prototyping/work on the site. If you wish to keep them move the **Portal – Content Column Common** before the ***New Detail** content block. Otherwise press the **X** on each block to remove it.

   For this exercise, click the pencil icon to edit the ***New Detail** content block.

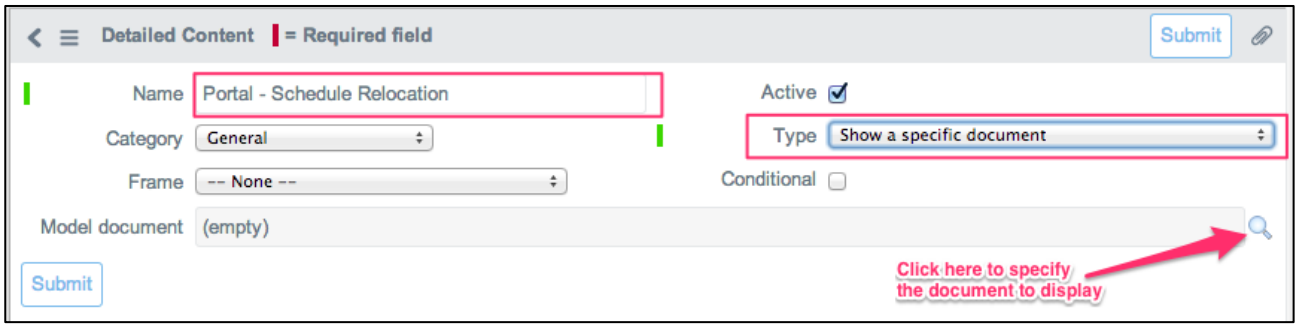


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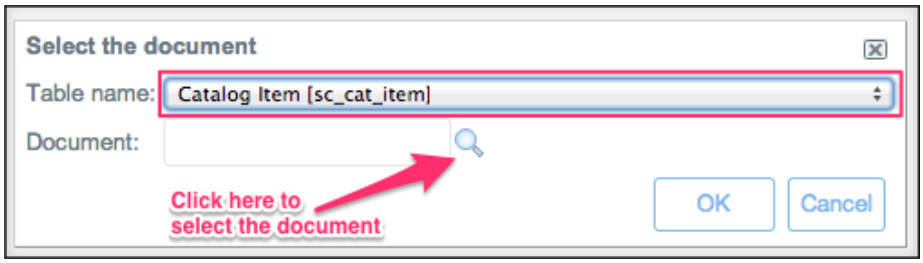
9. The **Detailed Content** record appears. This screen specifies the details of the new record. Enter the following changes:

   Name: **Portal – Schedule Relocation**
   Type: **Show a specific document**

   Click the magnifying glass to specify the document to display.

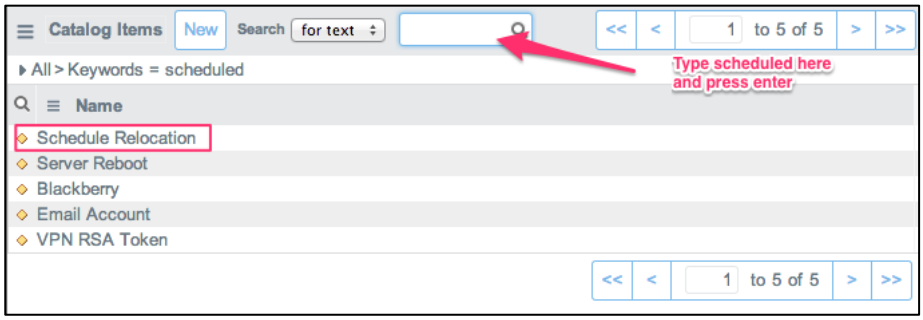


10. A **Select the document** window appears. In the **Table name** drop-down list, select **Catalog Item**. Select the **Document** by clicking the magnifying glass to browse for its name.

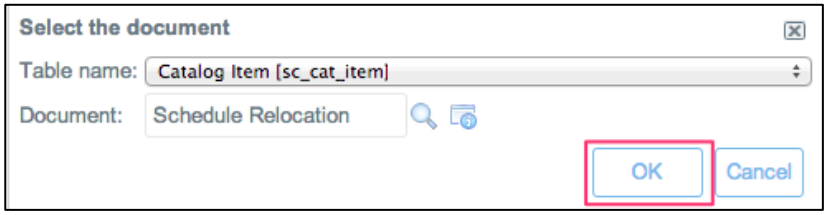


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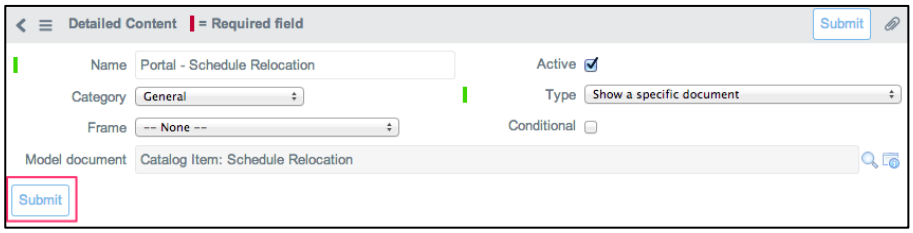
11. Filter the Catalog Items by typing **scheduled** in the filter and pressing **Enter**. Select **Schedule Relocation**.



12. The **Select the document** window should look like the example below. Press **OK** to continue.

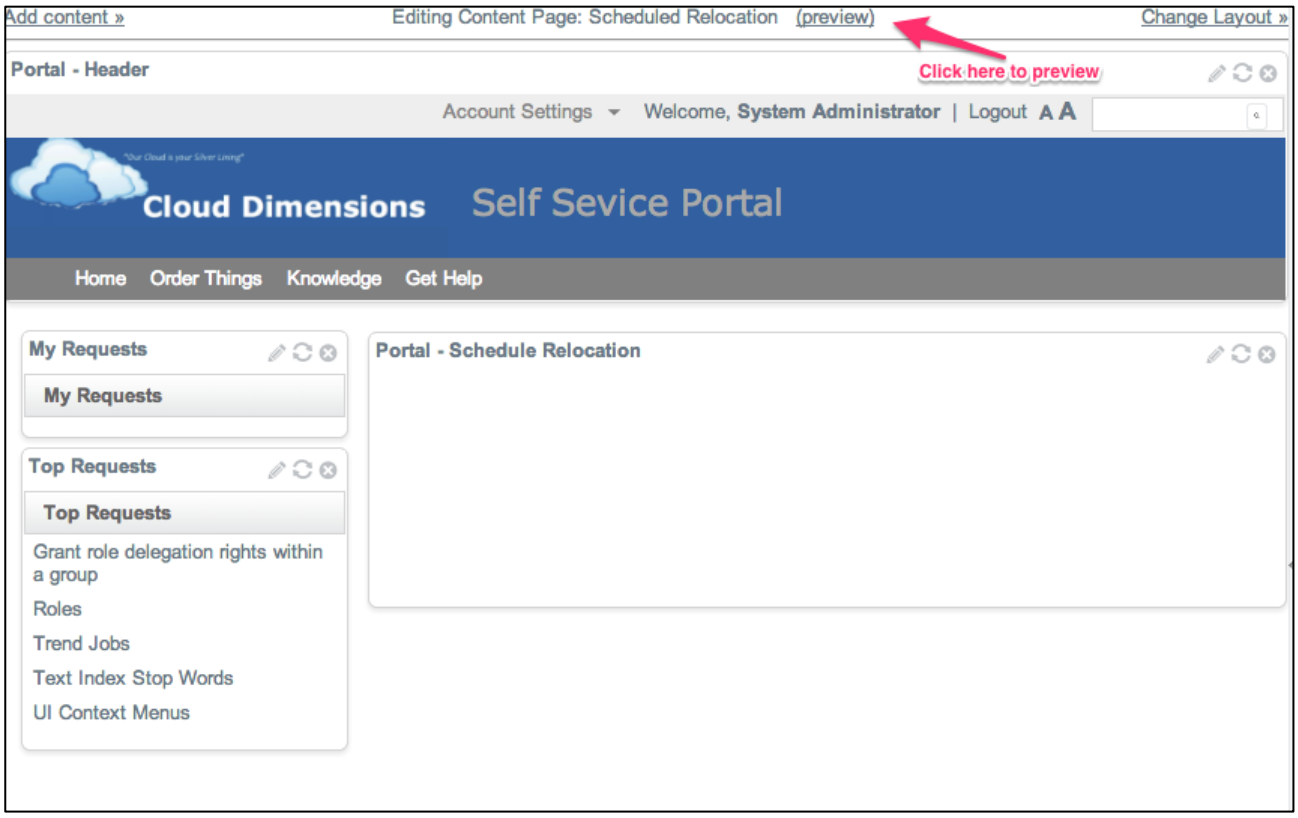


13. The **Detailed Content** record should look like the example below. Press **Submit** to continue.



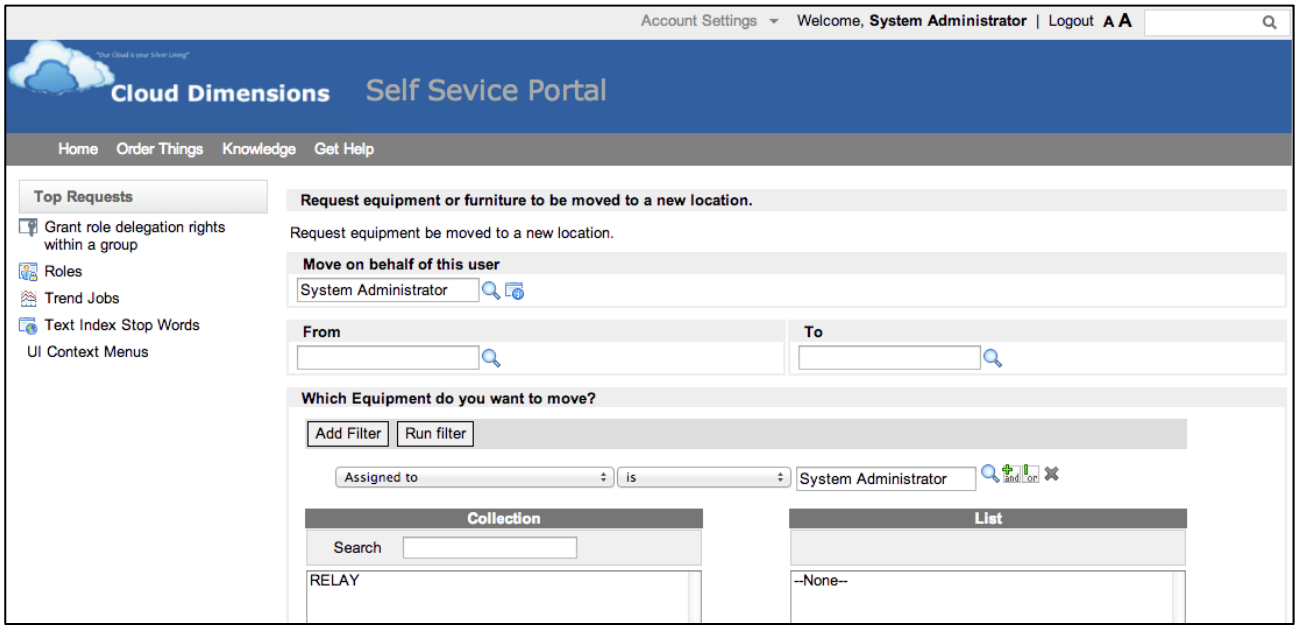
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14. The new page should look like the example below. To see how it appears to the end user, click the **preview** link.



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15. The **preview** window should look like the example below. Close this window when done.



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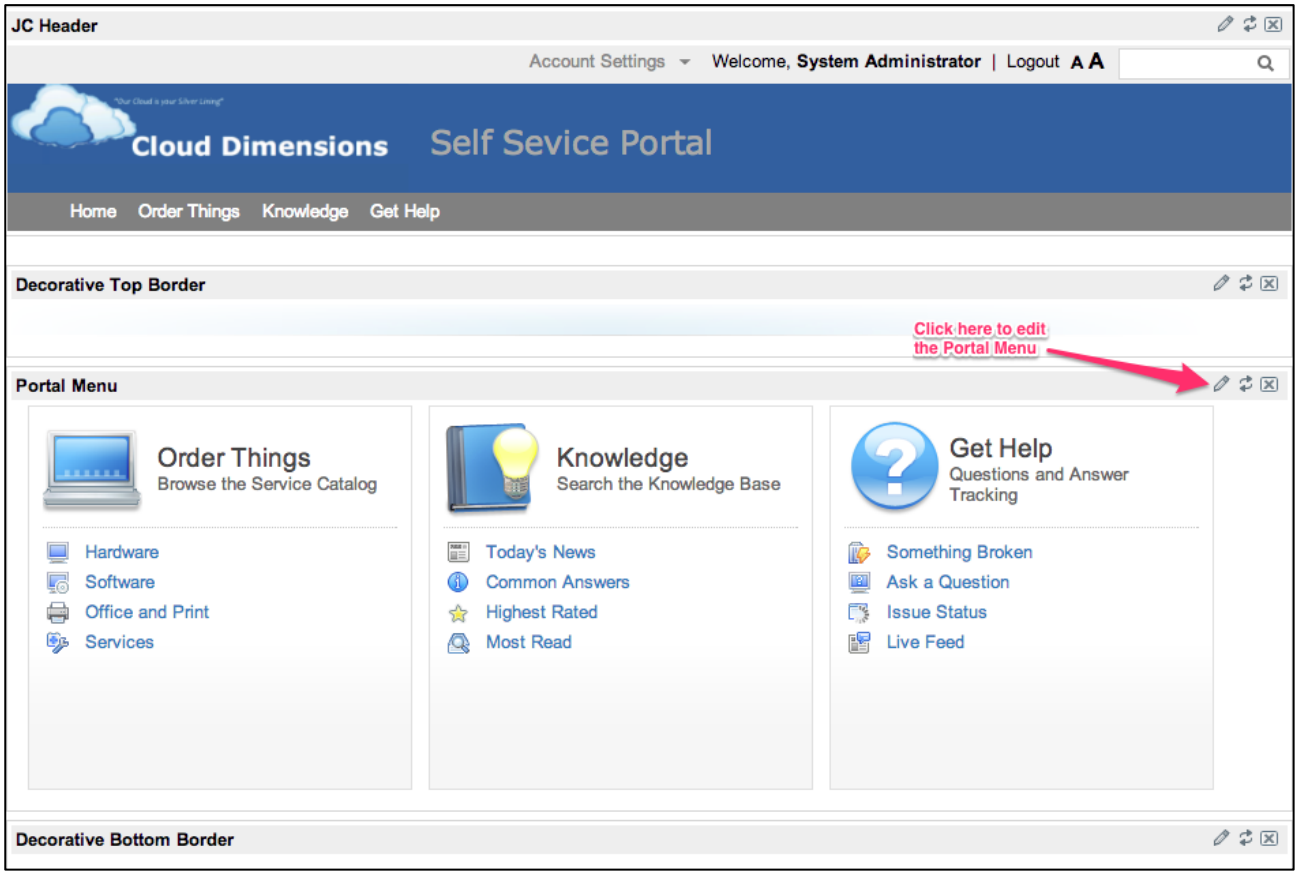
Add Menu item in Get Help Block Menu

1. After creating a content page, add this as a link in the **Get Help** block menu. Use the bookmark to open the **Portal** content page. Select **Edit Page**.



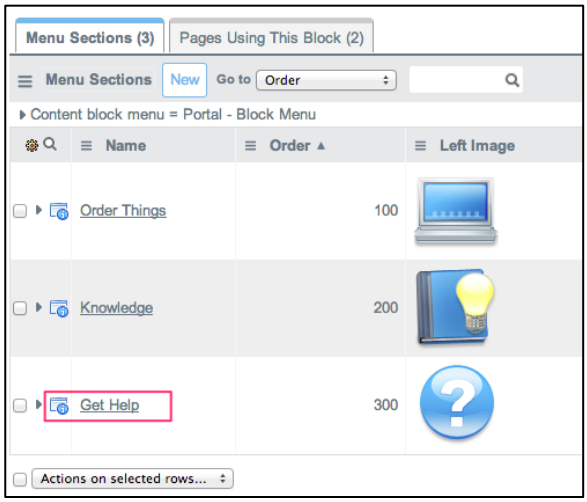
2. Alternatively, you can navigate directly to a menu to change it; however, opening the **Portal page** and selecting **Edit Page** clearly identifies the menu and items to be changed. This is the most consistent way of making menu changes until you are familiar to the menu.

   In this exercise, change the **Portal Menu**. Press the pencil icon to edit the menu.



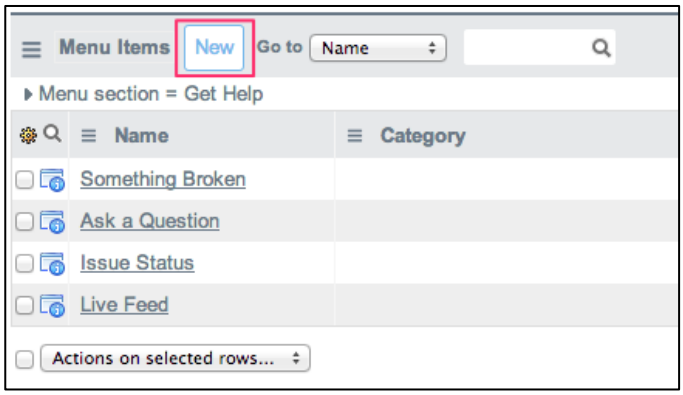
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3. The details of the **Portal Menu** appear. The three sections are shown at the bottom under **Menu Sections**. To add an item to the **Get Help** block, click the **Get Help** section.



4. The information for this block appears. Scroll down to the bottom to see the Menu Items, where you add the new menu items.

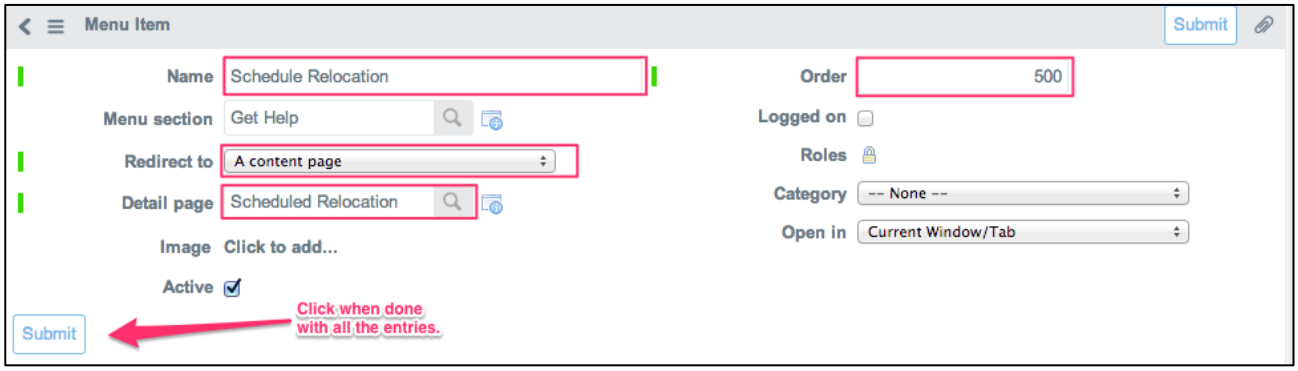
   To add a menu item, click the **New** button.



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5. The new **Menu Item** form opens. Enter the following information:

   Name: **Schedule Relocation**
   Redirect to: **A content page**
   Detail page: **Scheduled Relocation** (the new page just added)
   Order: **500**



6. Click **Submit** after completing the entries.

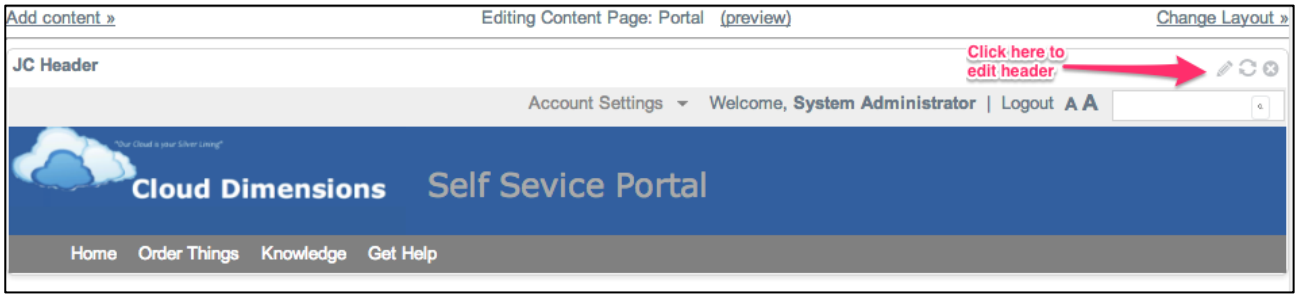
Add Menu Item to the Header Bottom Menu

1. Follow these steps to add the **Schedule Relocation** menu item to the drop-down menu in the **Get Help** block on the banner bottom menu.
   Click the bookmark to open the **Portal** content page. Select **Edit Page**.

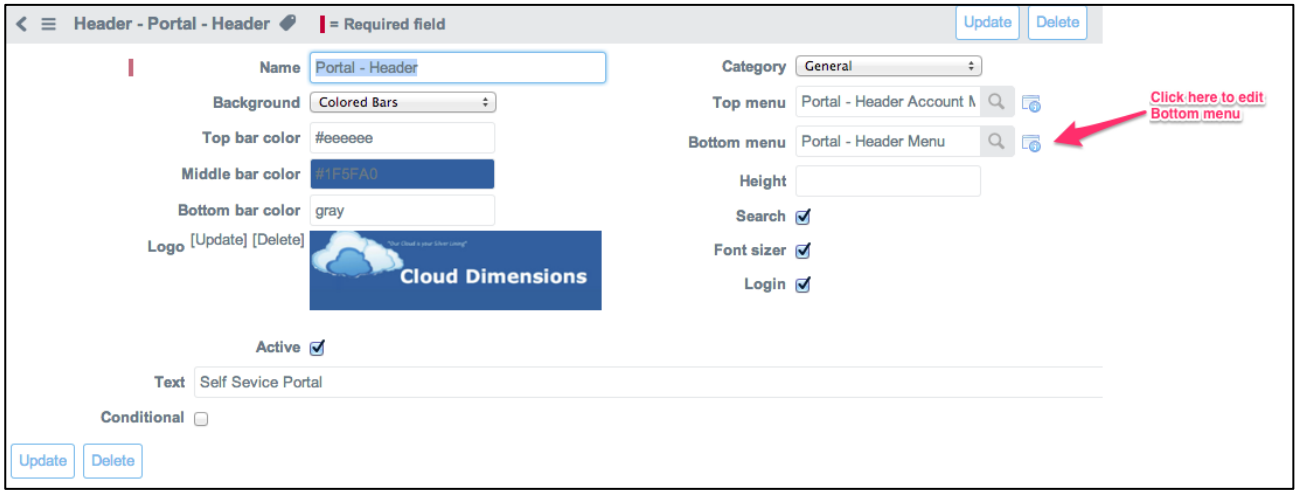


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2. Change the menu in the header. Click the pencil icon to edit the **JC Header** content block.



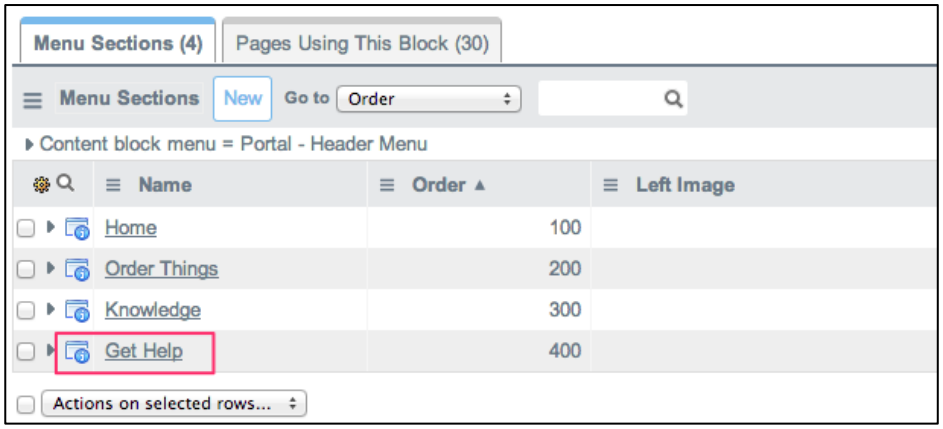
3. Notice that there are two menus on the header. The **Top** menu is above the blue background and the **Bottom** menu is in the gray bar. Click the record icon next to the **Bottom** menu field to edit the **Bottom** menu.



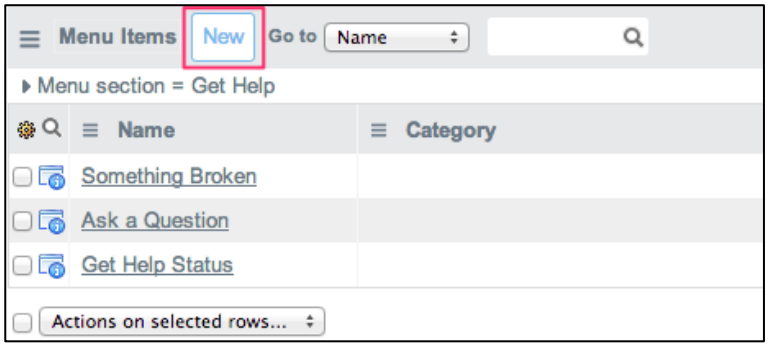
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4. The rest of the steps now should be familiar. They are the same steps used to add the **Schedule Relocation** link to the block menu. The only difference here is how we accessed menu. The menu sections for the **Bottom** menu are at the bottom of the **Navigation Menu – Portal – Header Menu** form. These are the names in the bar. Each contains the list of menu items that appear in each drop-down list. Here, add the new menu item to the **Get Help** Menu Section by following the steps below.

   Click **Get Help**.



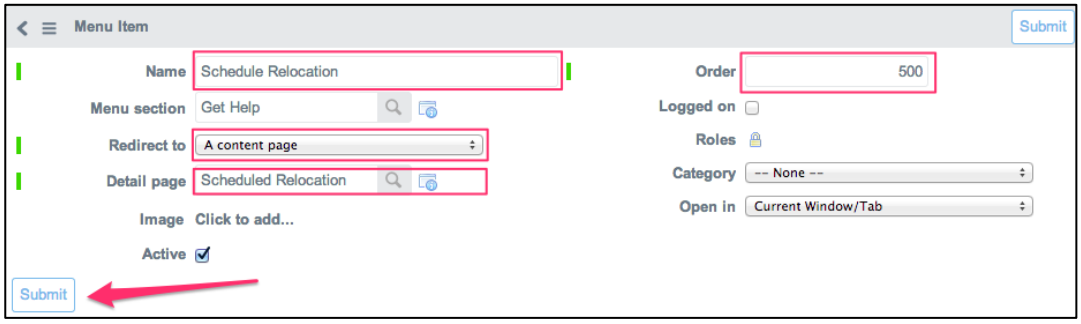
   As before, click the **New** button next to **Menu Items**.



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In the new **Menu Item** form, fill in the following information:

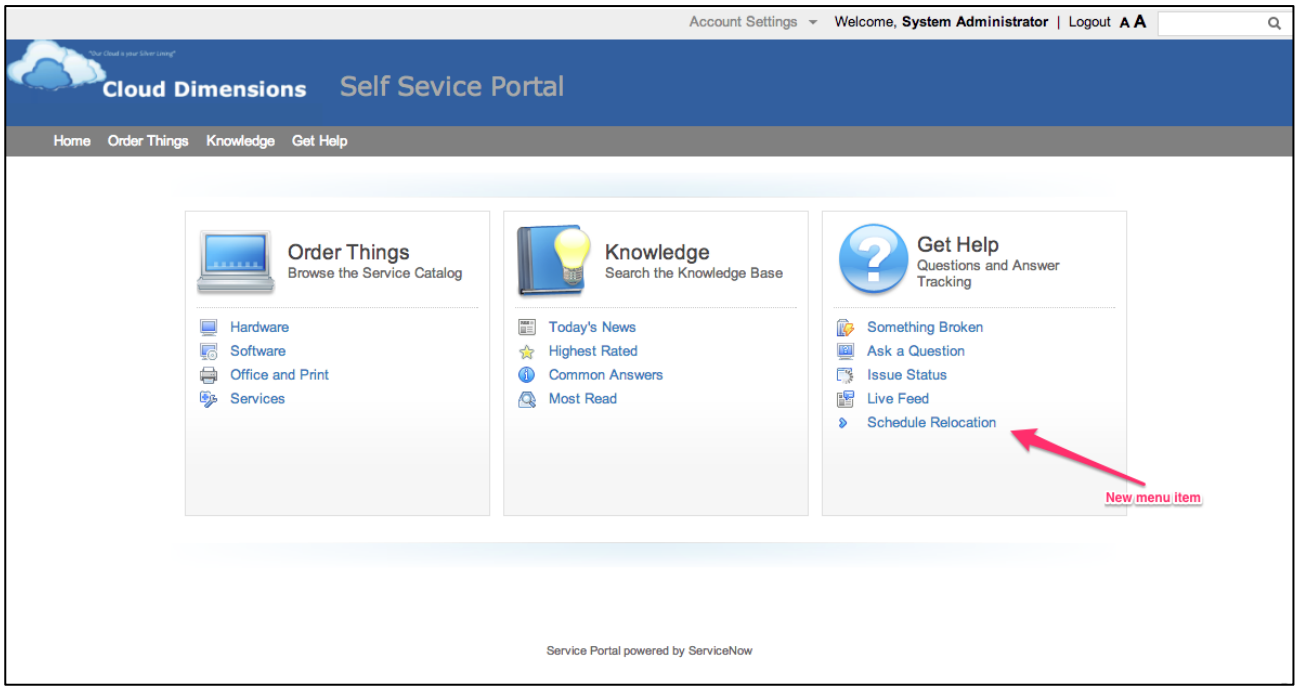
Name:	**Schedule Relocation**	Detail page:	**Scheduled Relocation**
Redirect to:	**A content page**	Order:	**500**



Lab Success Verification

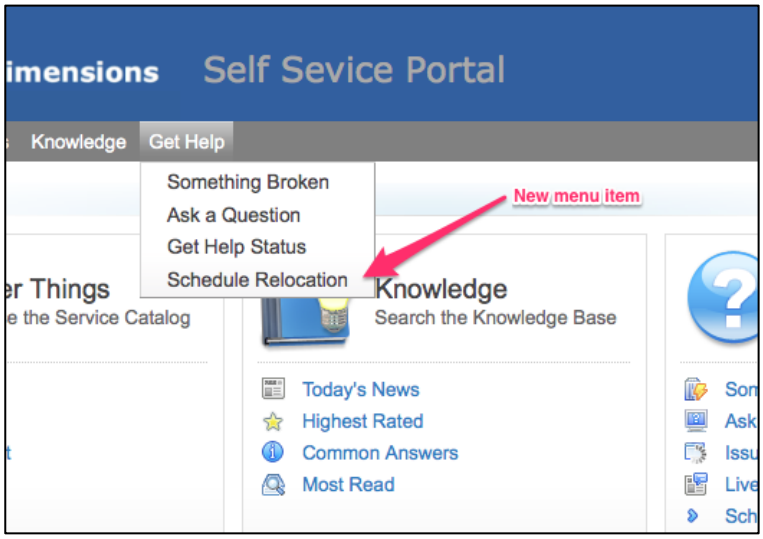
1. Navigate to **http://<YOURINSTANCE>.service-now.com/ess**

2. The screen should look like the example below.

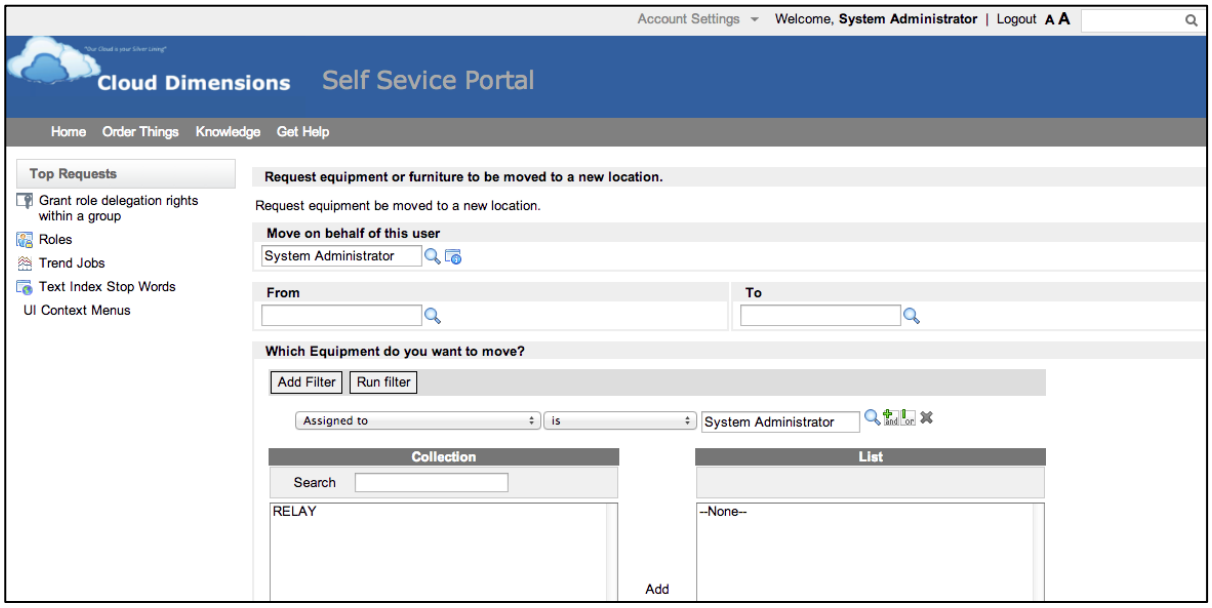


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3. Move mouse over the **Bottom** menu bar to **Get Help**.



4. Select the **Schedule Relocation** item. The screen should look like the example below.



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Lab Goal

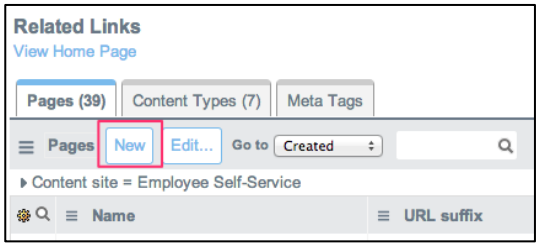
This lab explains how to add the “Can We Help You?” service category to the Order Things block menu.

Lab 3
Add “Can We Help You?”

Add a New Content Page for the “Can We Help You?” Service Category

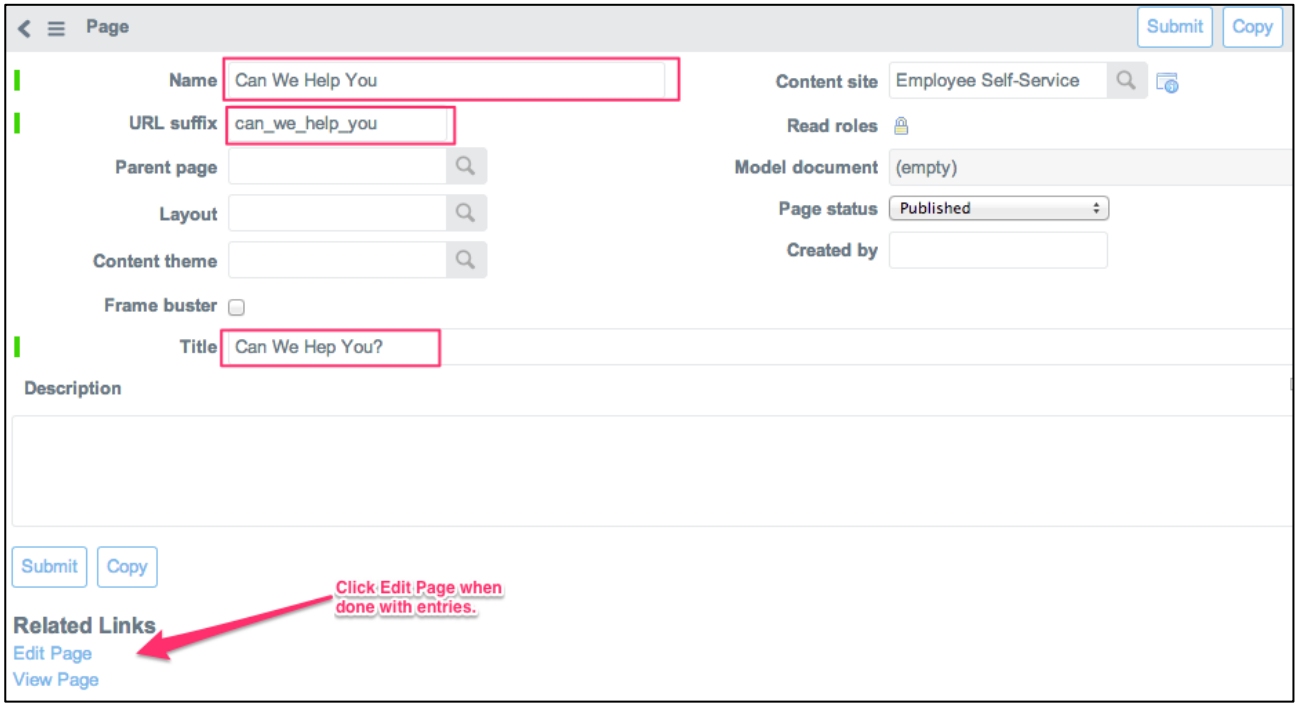
1. Using the bookmark, go to the **Employee Self-Service** site page. This exercise creates a page, rather than copying it, in order to show the difference. At the bottom of the form find the Pages associated with the site.

2. Click **New** in the **Pages** area to create a new Page.



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3. Enter the following information:
   Name: **Can We Help You**
   URL suffix: **can_we_help_you**
   Title: **Can We Help You?**



4. Click the **Edit Page** link after completing the entries.

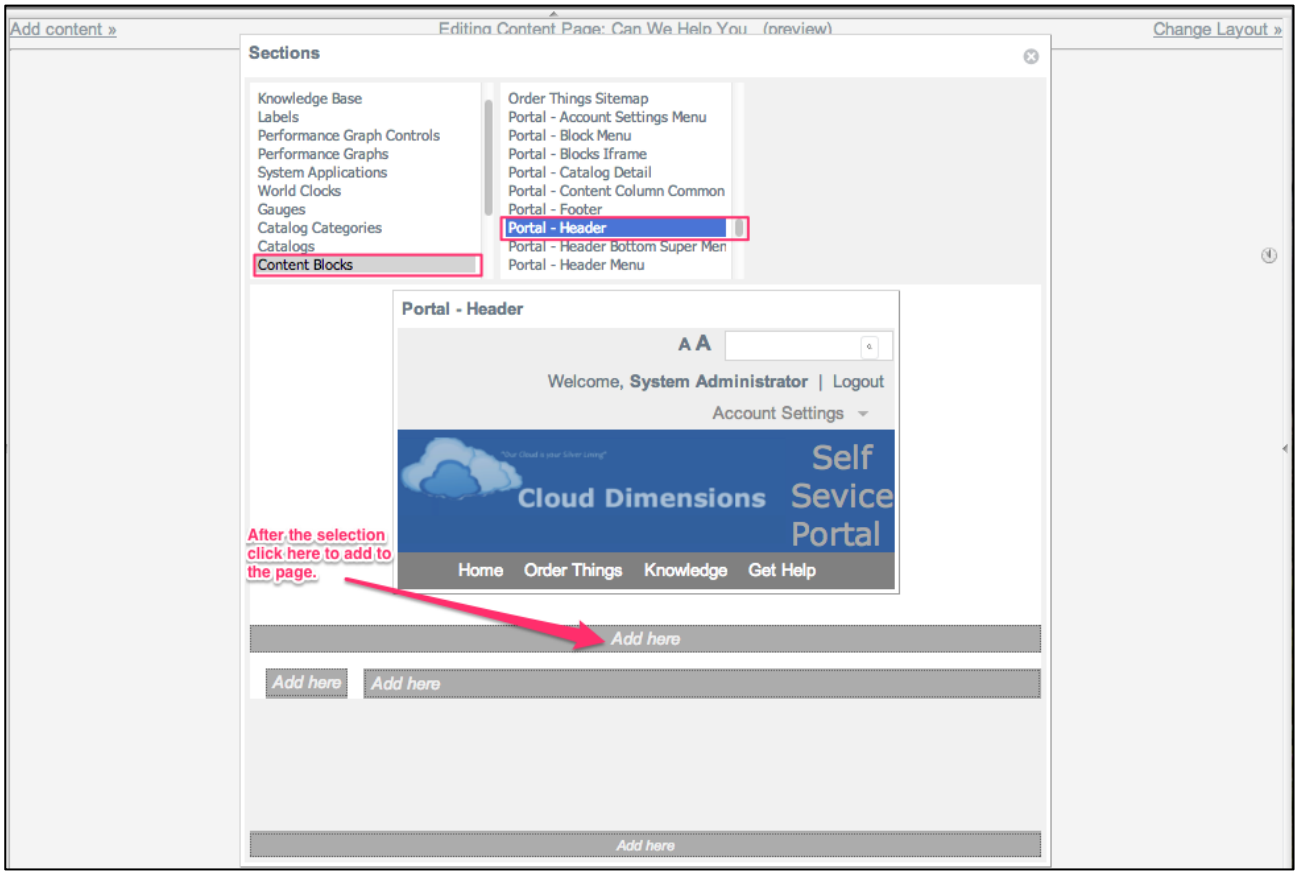
5. A blank page appears. Click the **Add content** link to start adding content to the page.



6. First add the header to the top of the form. In the Sections group box, select **Content Blocks** on the left then scroll down to **Portal – Header** and select it. A preview of the header appears. Below the preview are the dropzones for placing content.

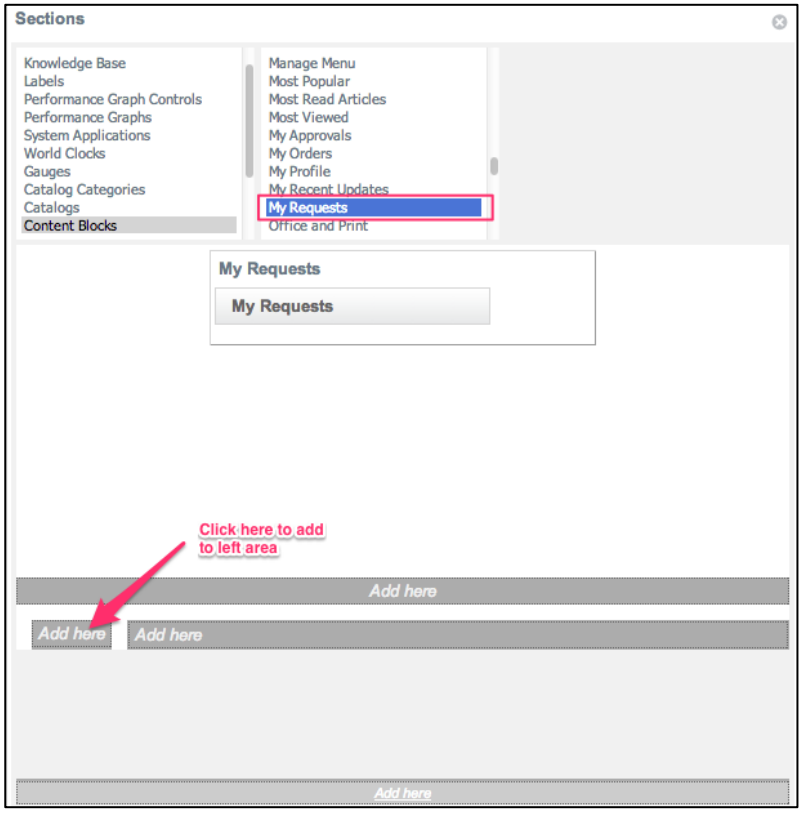
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7. Click the **Add here** link in the top dropzone.



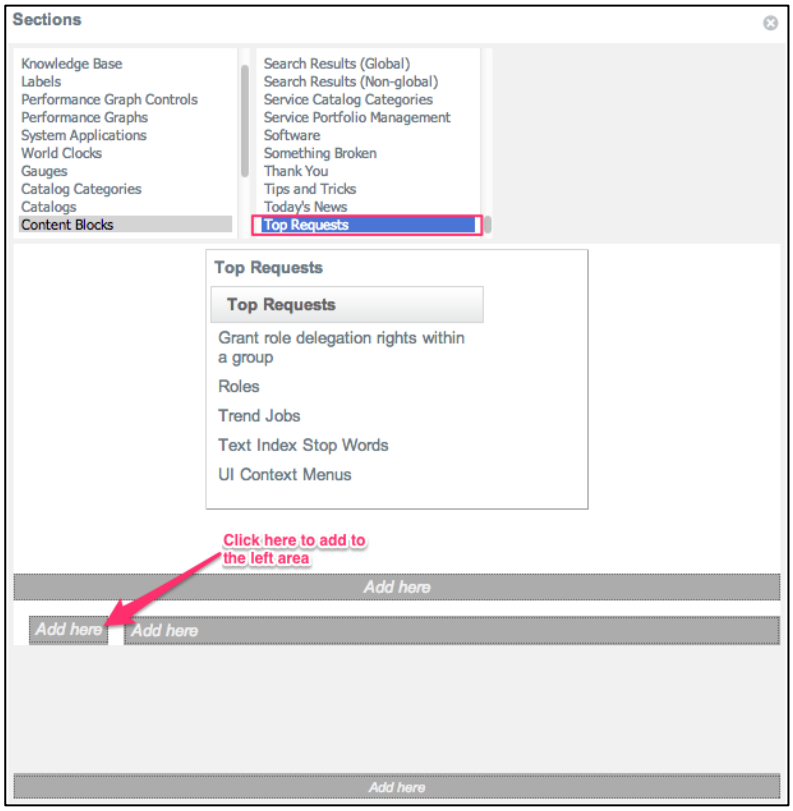
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8. The header appears on the page in the background. The **Sections** pane is still available. Use this pane to add multiple items to the page. In this step, add **My Requests** to the left dropzone area by selecting the **Content Blocks** field and **My Requests** from the resulting list. Click **Add here** after making the selections.



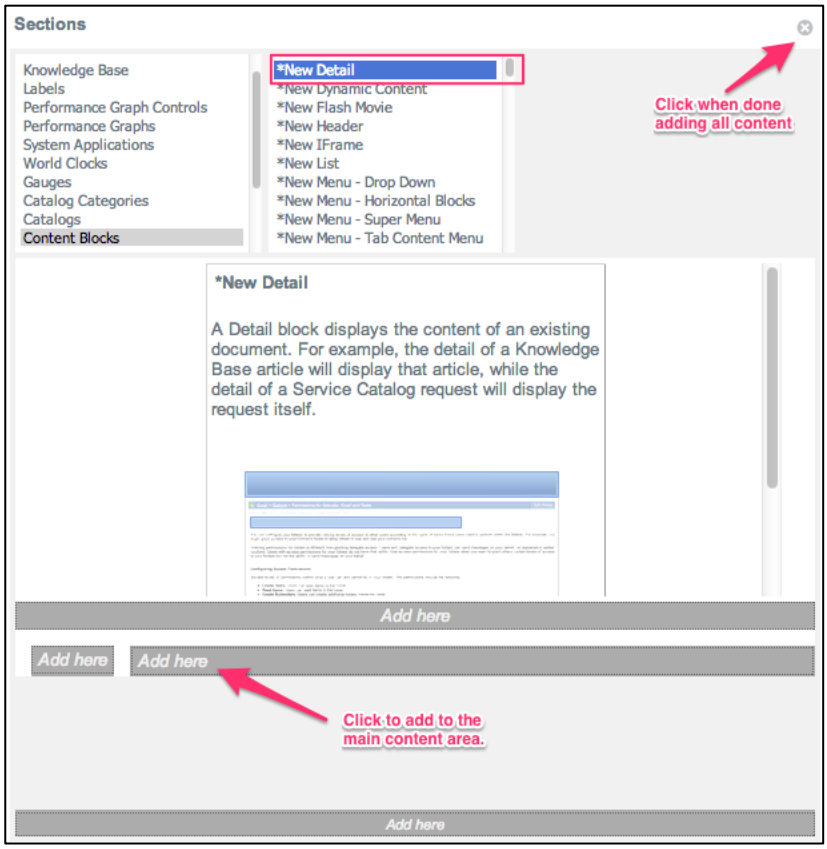
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9. Repeat the step to add **Top Requests**.



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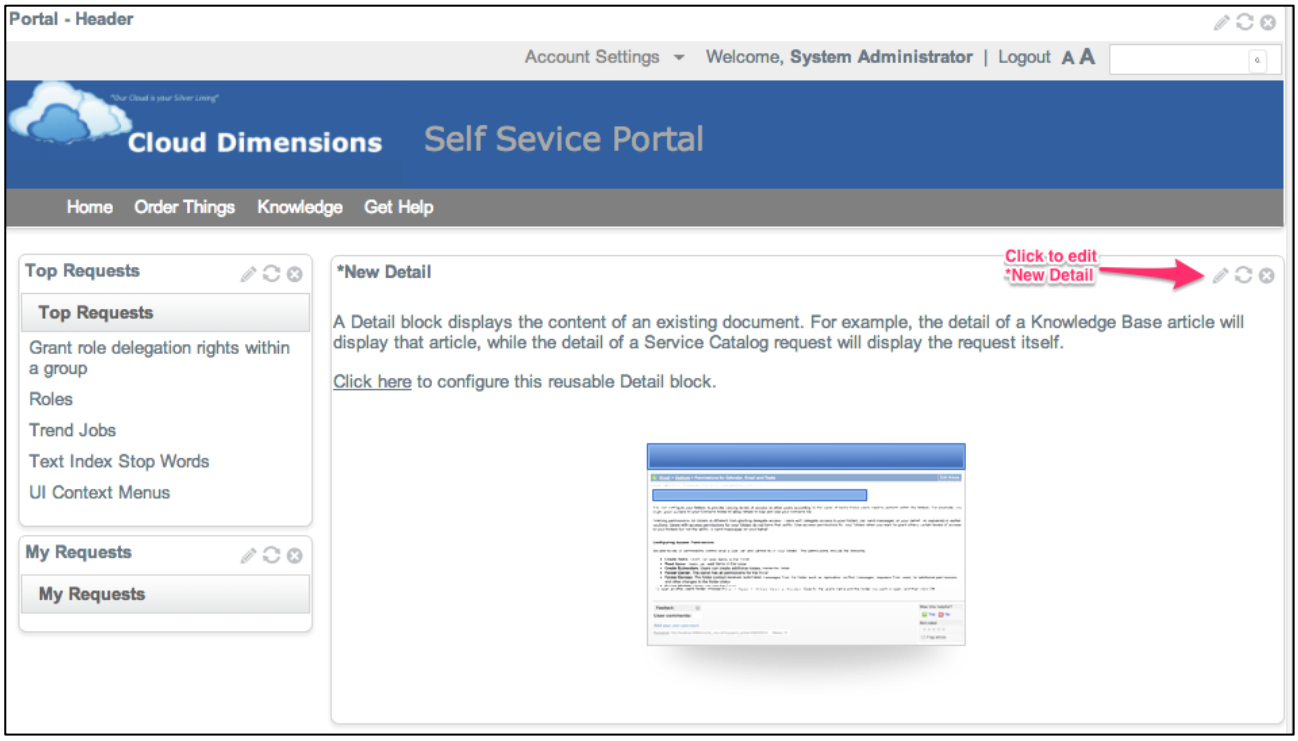
10. Follow the similar steps used in the **Scheduled Relocation** page to add ***New Detail** content to the main content dropzone.



11. After completing the steps, click the **X** in the top-right of the **Sections** pane to close the pane.

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12. The page should look like example below. Edit the ***New Details** block by clicking the pencil icon in that block.



13. Enter the following information into the form:

Name: **Can We Help You**
Type: **Show a specific document**

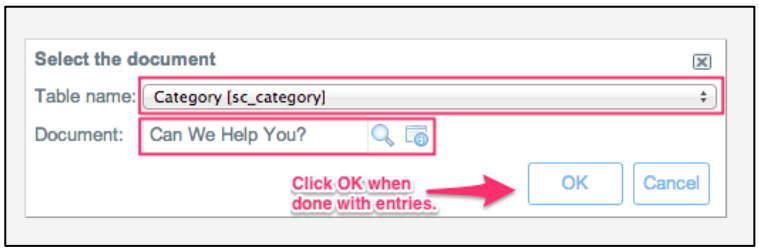


14. Click the magnifying glass to select the document.

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15. Select **table name**. Use **Category** for the table name.

16. Select the **Can We Help You?** document by clicking the magnifier icon to display the available documents. Click **OK**.



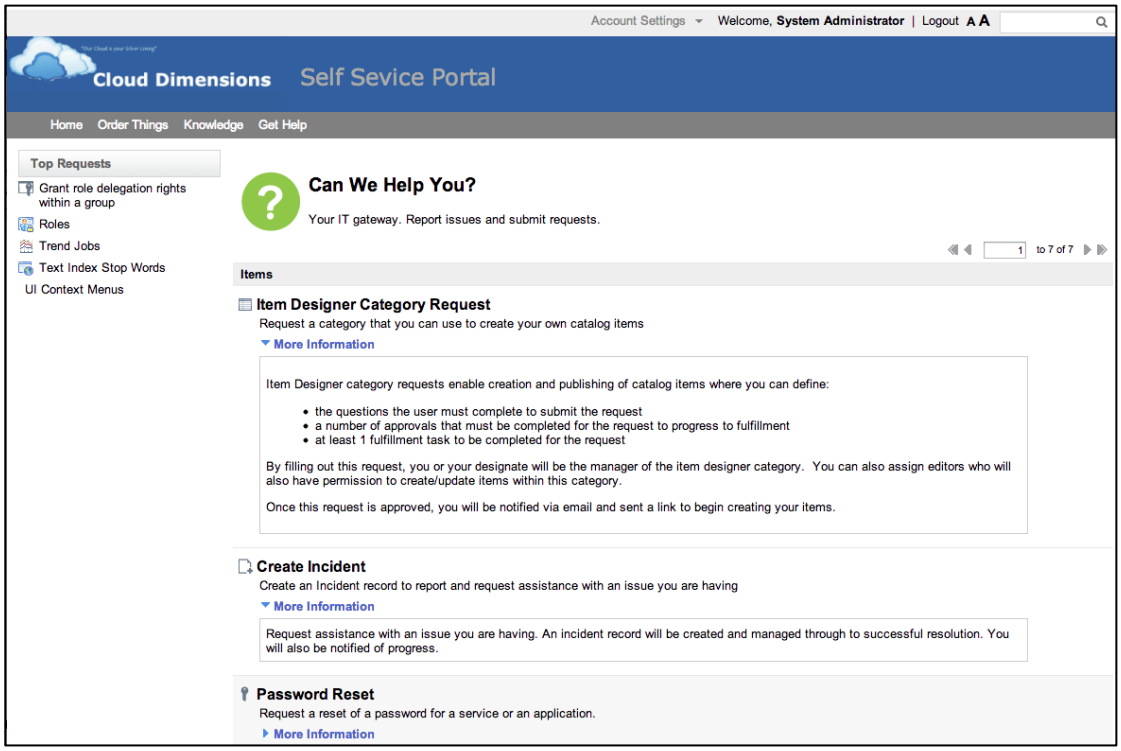
17. Click **Submit**.

18. Preview the new page by clicking the **preview** link.



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19. The page should look like the example below.



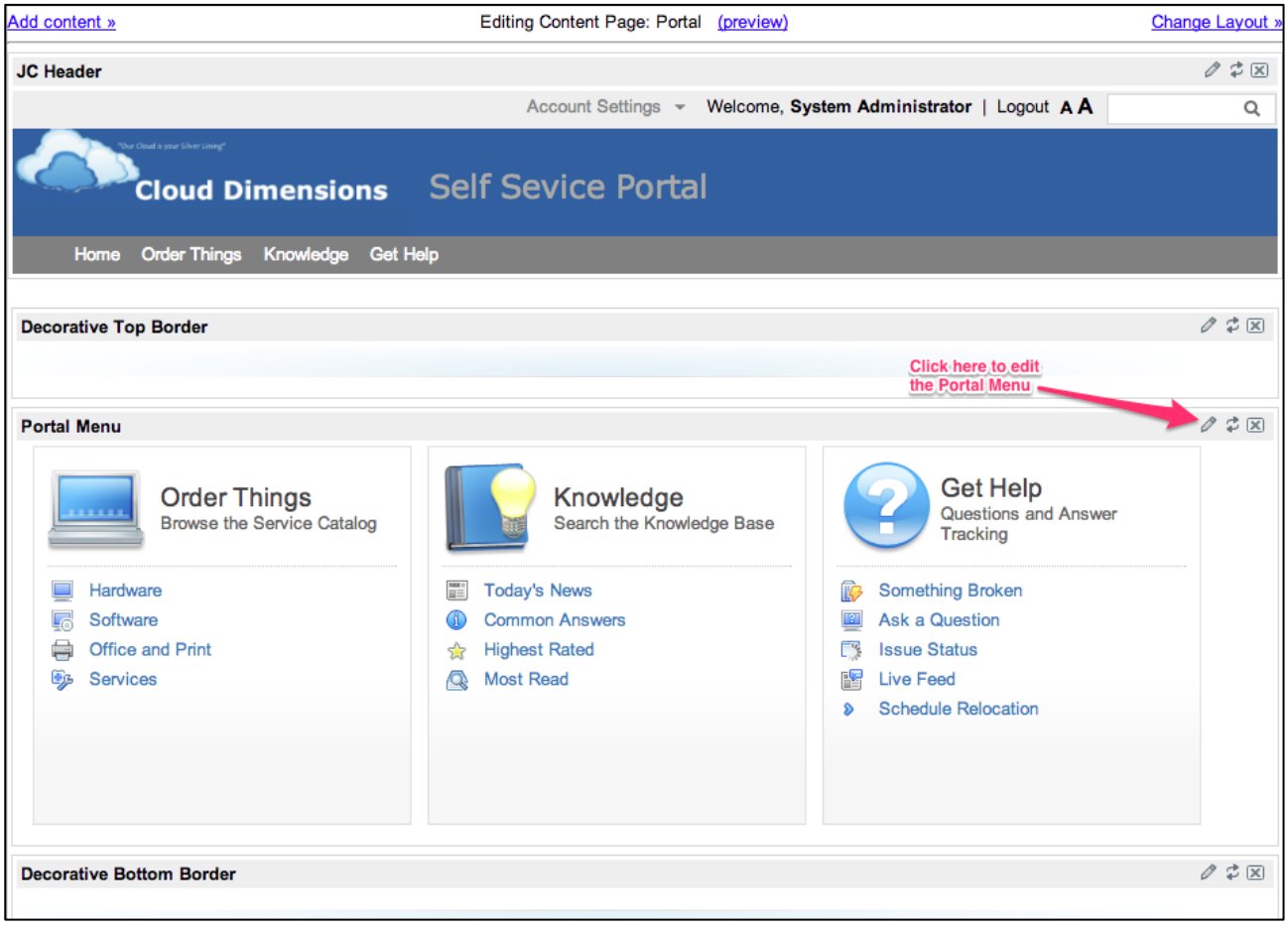
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Add New Menu Selection to the Order Things Block Menu

1. Follow these steps to add the new menu selection as a link in the **Order Things** block menu. Using the bookmark, go to the **Portal** content page. Select **Edit Page**.

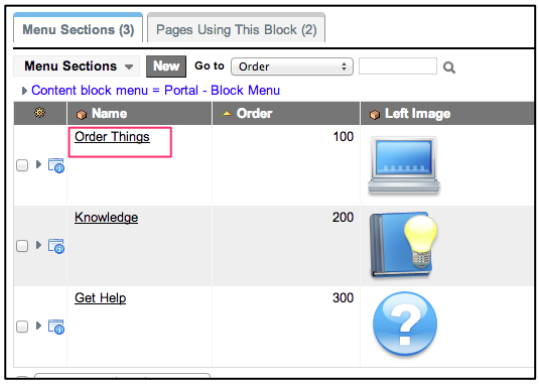


2. Change the **Portal Menu**. Click the pencil icon to edit the menu.

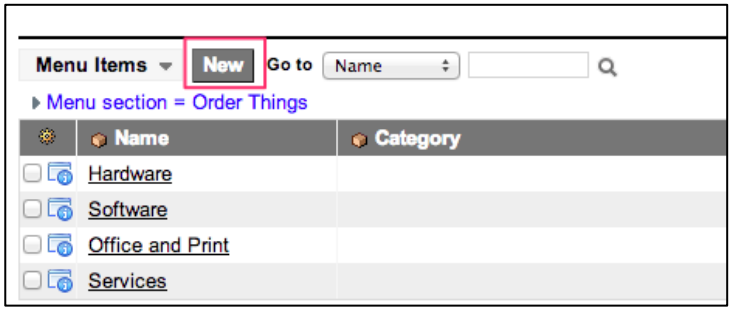


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3. The details of the **Order Things Menu** appear. Three sections appear at the bottom under **Menu Sections**. To add an item to the **Order Things** block, click the **Order Things** link.

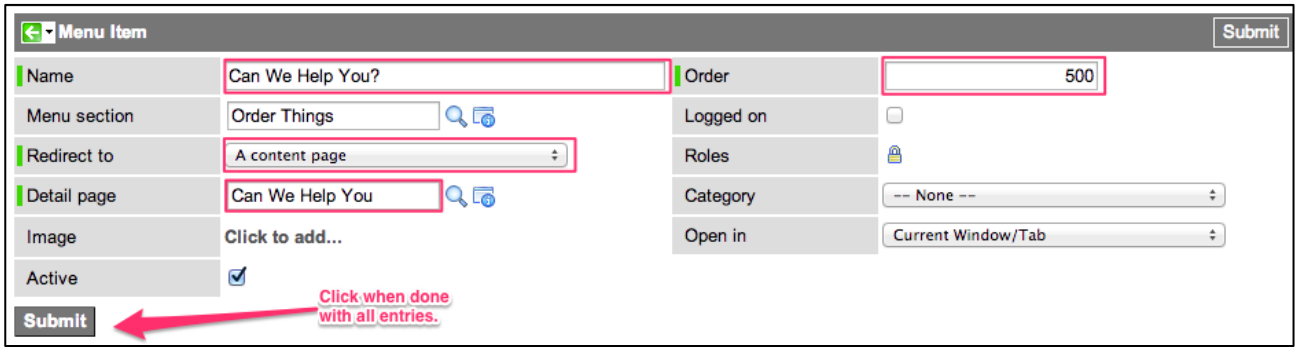


4. Add a new **Menu Item** by clicking the **New** button next to the **Menu Items** field.



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5. Enter the following information into the **Menu Item** form. Click **Submit** after completing the entries.
   Name: **Can We Help You?**
   Order: **500**
   Redirect to: **A content page**
   Detail Page: **Can We Help You**

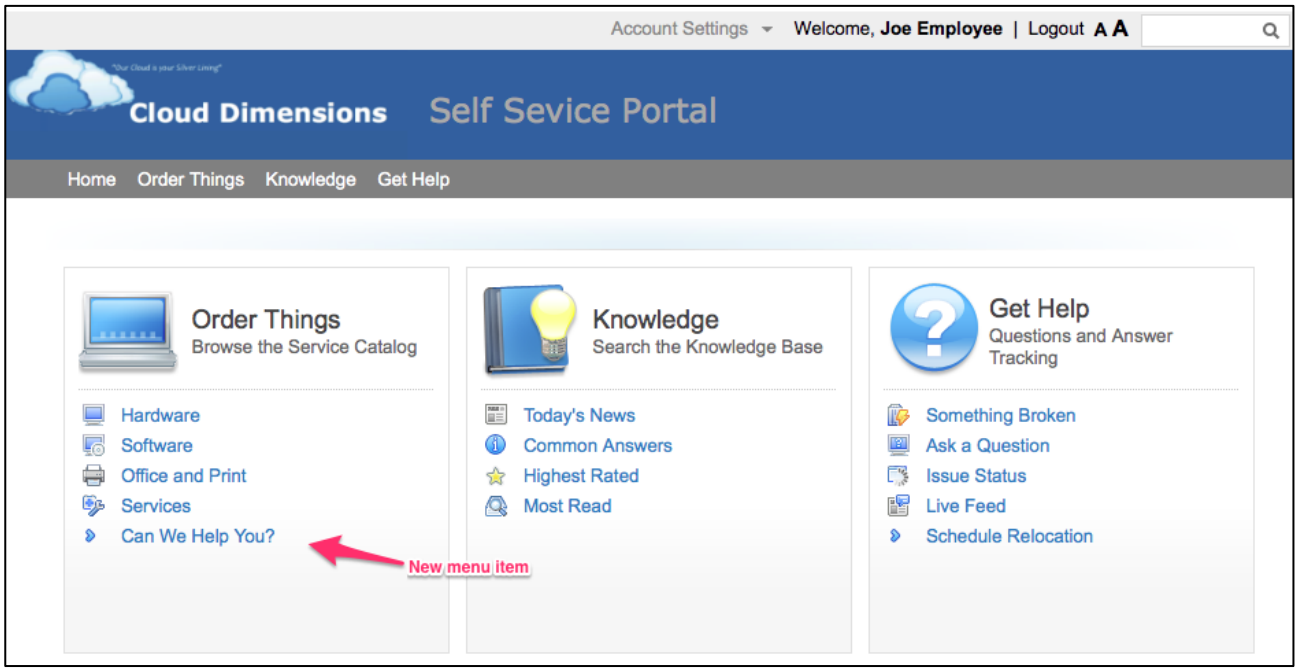


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Lab Success Verification

1. Navigate to **http://<YOURINSTANCE>.service-now.com/ess**

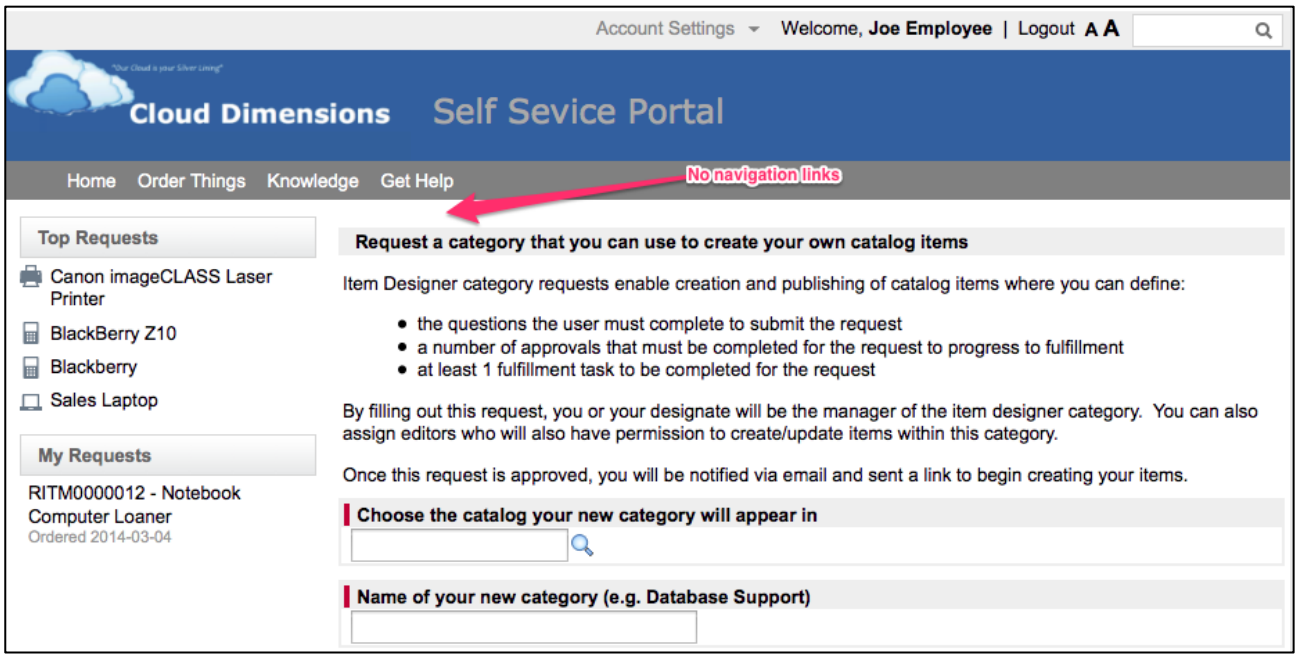
   The screen should look like the example below:



2. Click the new **Can We Help You?** menu item. The new page should contain all the choices in the **Can We Help You?** service catalog category.

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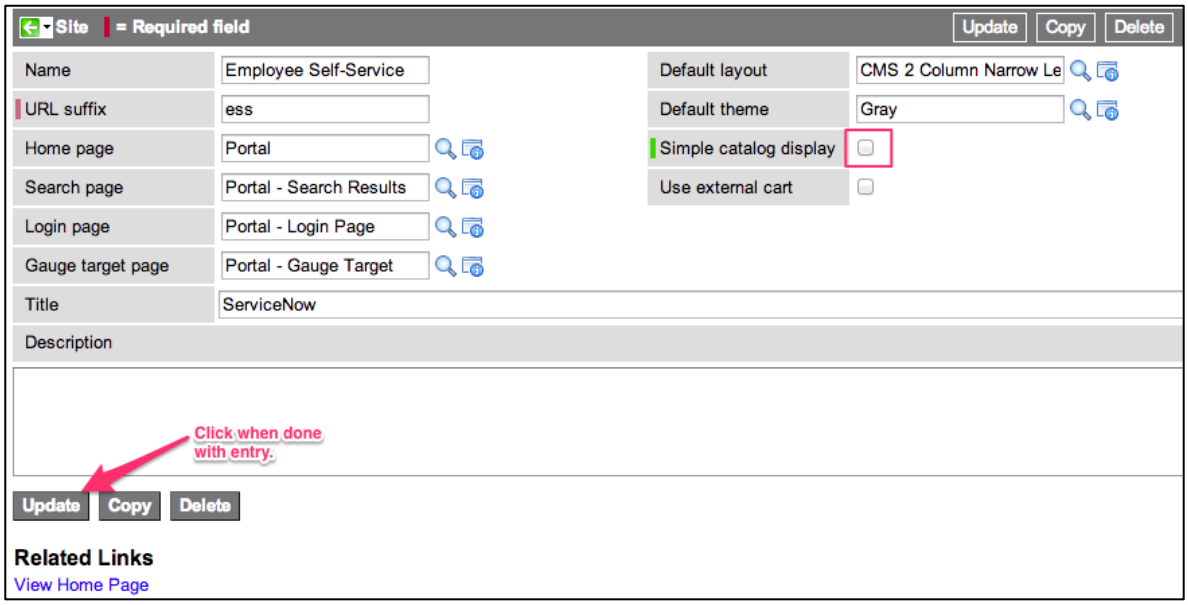
3. Select any item in the list. Notice that there is no **Search** option or **Back** button on the screen. The lack of these tools may cause navigation issues for end users; the problem must be fixed.



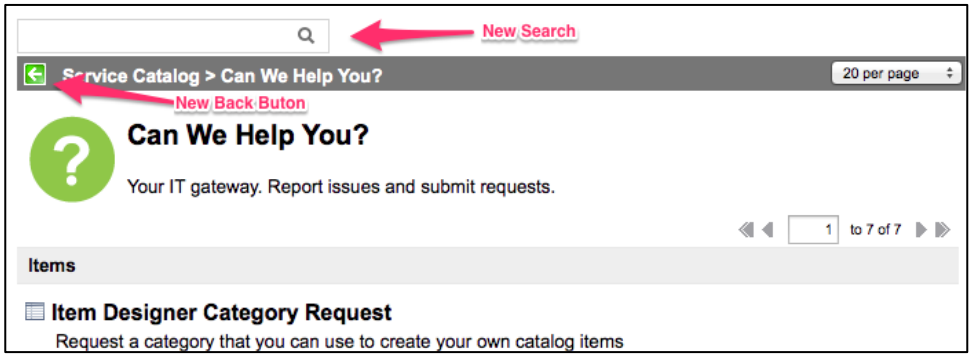
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Fix Navigation Issue

1. Using the bookmark, go to the **Employee Self-Service** site page. Deselect the **Simple catalog display** field and click **Update**.

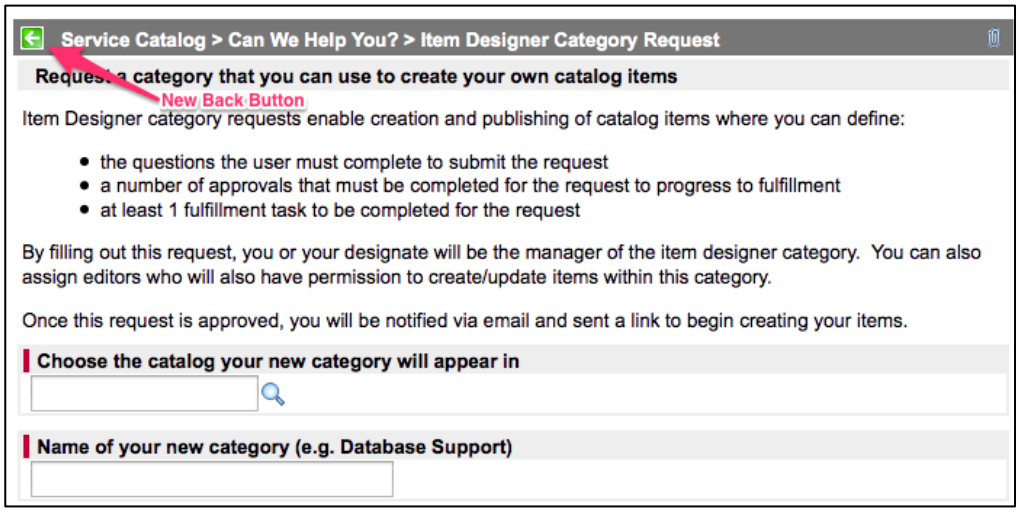


2. Test the page again using the previous Lab Verification steps. The new page should now contain a **Back** button and a **Search** field.



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3. A selected item should now display a **Back** button.



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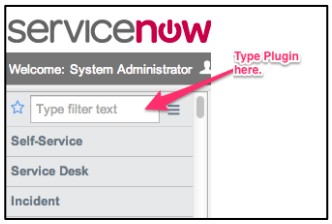
Lab Goal

This lab explains how to add a **Chat** capability that allows end users to chat with the support desk. The lab also explains how to change the layout for the new **Can We Help You** section.

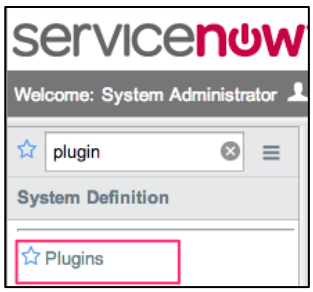
Lab 4
Add Chat and Change Layout

Adding Chat to the Site

1. Adding Chat capabilities to the site is as easy as activating the **Chat** plugin on the instance. In Enter **Plugin** to replace “Type filter text” in the Module List.

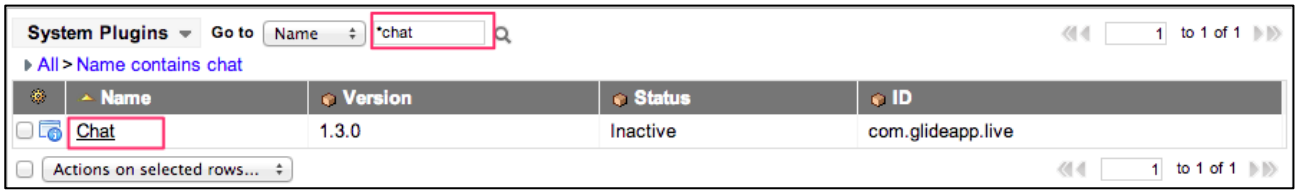


2. Select **Plugins**.

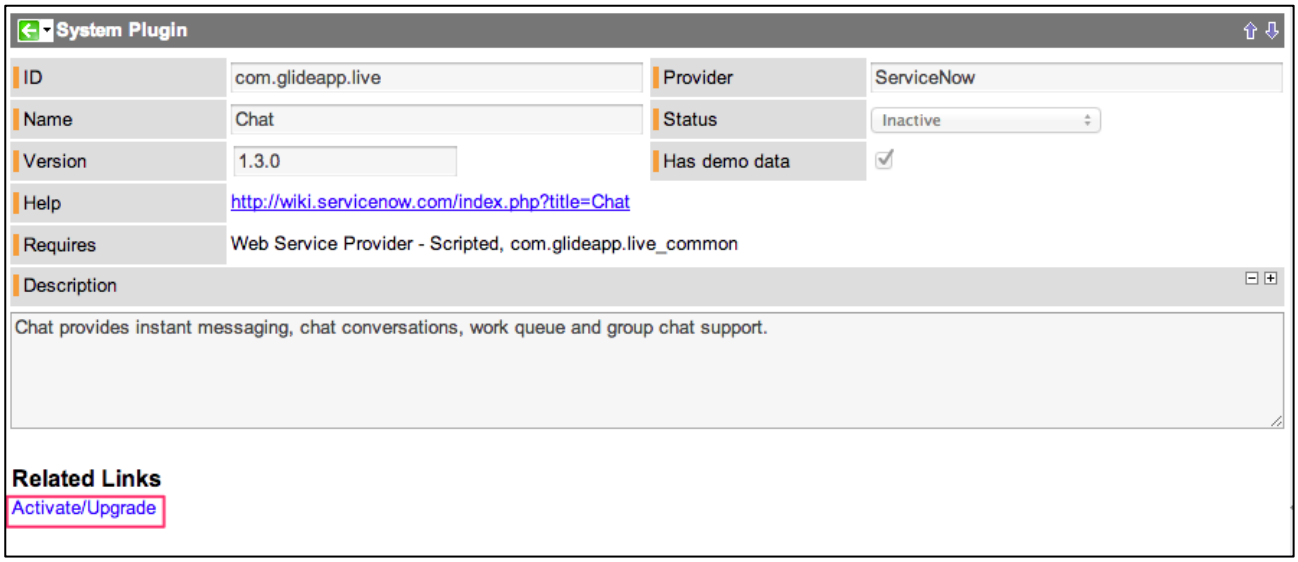


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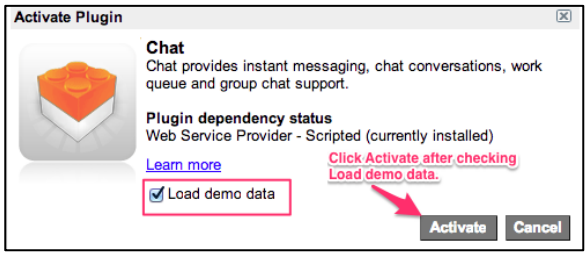
3. In the **Go to Name** field, type ***chat** and press **Enter**. Select the **Chat** plugin.



4. Click the **Activate/Upgrade** link.



5. Select the **Load demo data** option and press **Activate**.

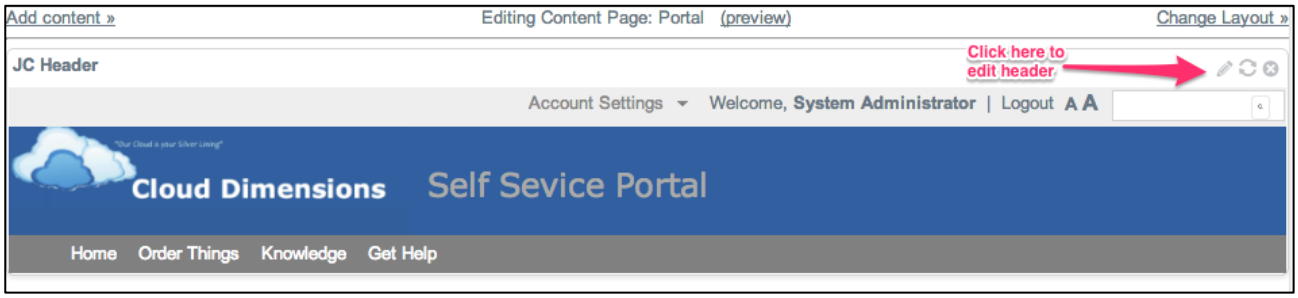


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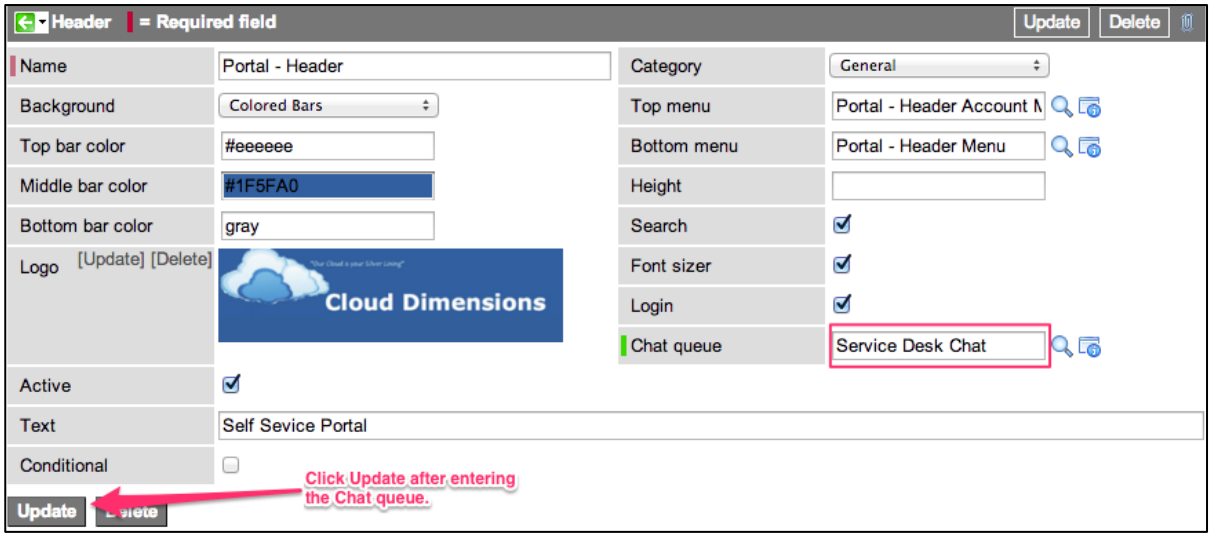
6. Using the bookmark, go to the **Portal** content page. Click **Edit Page**.



7. The **Chat** option is in the header screen, which must be edited. Click the pencil icon to edit the **JC Header** content block.

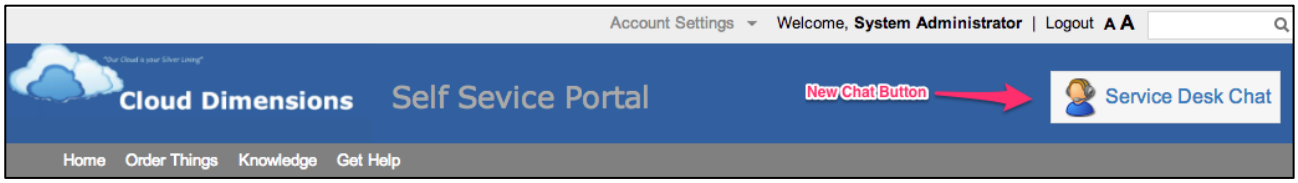


8. In the **Header** screen a new field, **Chat queue**, appears on the form. The demo data on the plugin creates a **Service Desk Chat** in the **Chat queue**. Enter **Service Desk Chat** in **Chat queue** field and press **Update**.



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9. Click the **preview** link. The new header should look like the example below. Close window/tab when done.



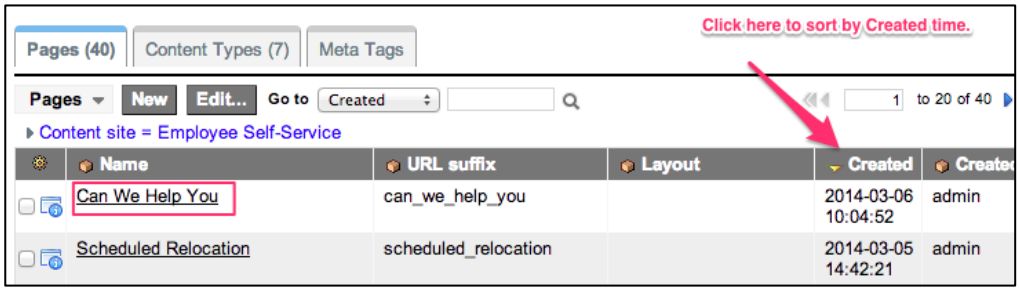
Change the Layout of the "Can We Help You?" Page

1. Follow the steps below to move the **Top Request and My Request** lists to the right side of the screen.

   Using the bookmark, go to the **Employee Self-Service** site page.

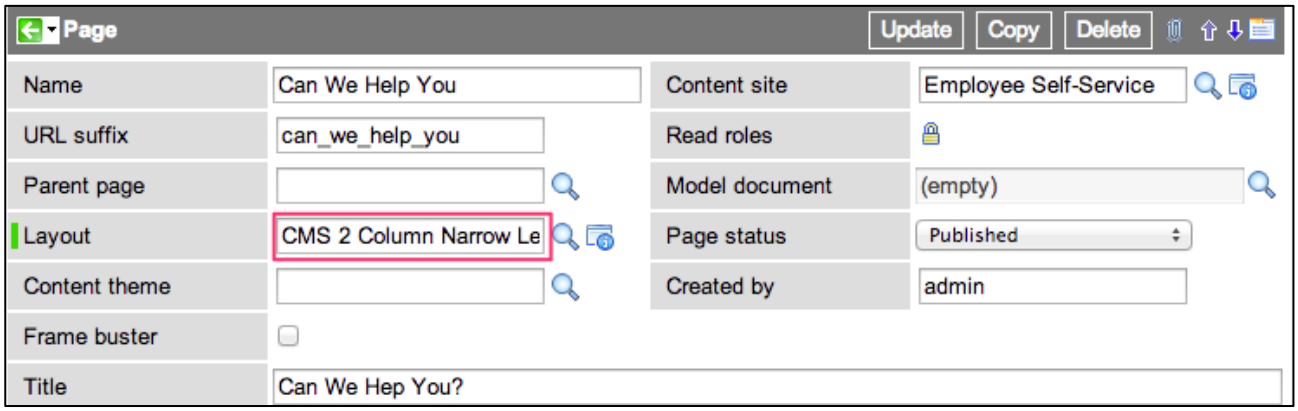
   The bottom of the form lists all the Pages on the site. Sort by the **Created** date by clicking the column heading. Both new pages appear at the top of the list.

   Click the **Can We Help You** page.

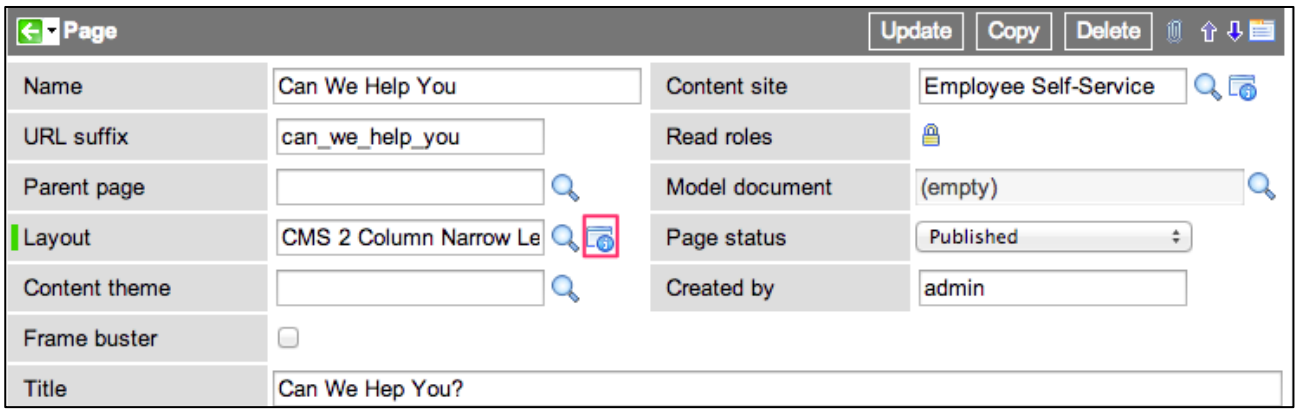


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2. The Layout field is blank, which means the layout of the site is inherited. To accommodate a layout change, specify the layout to use. If there is no layout that meets your needs, add a new layout for this page. The easiest way to do this is to start with something that is close to what you need. This exercise uses **CMS 2 Column Narrow Left** as a starting point. Change the layout by clicking the magnifier and selecting the **CMS 2 Column Narrow Left** layout.

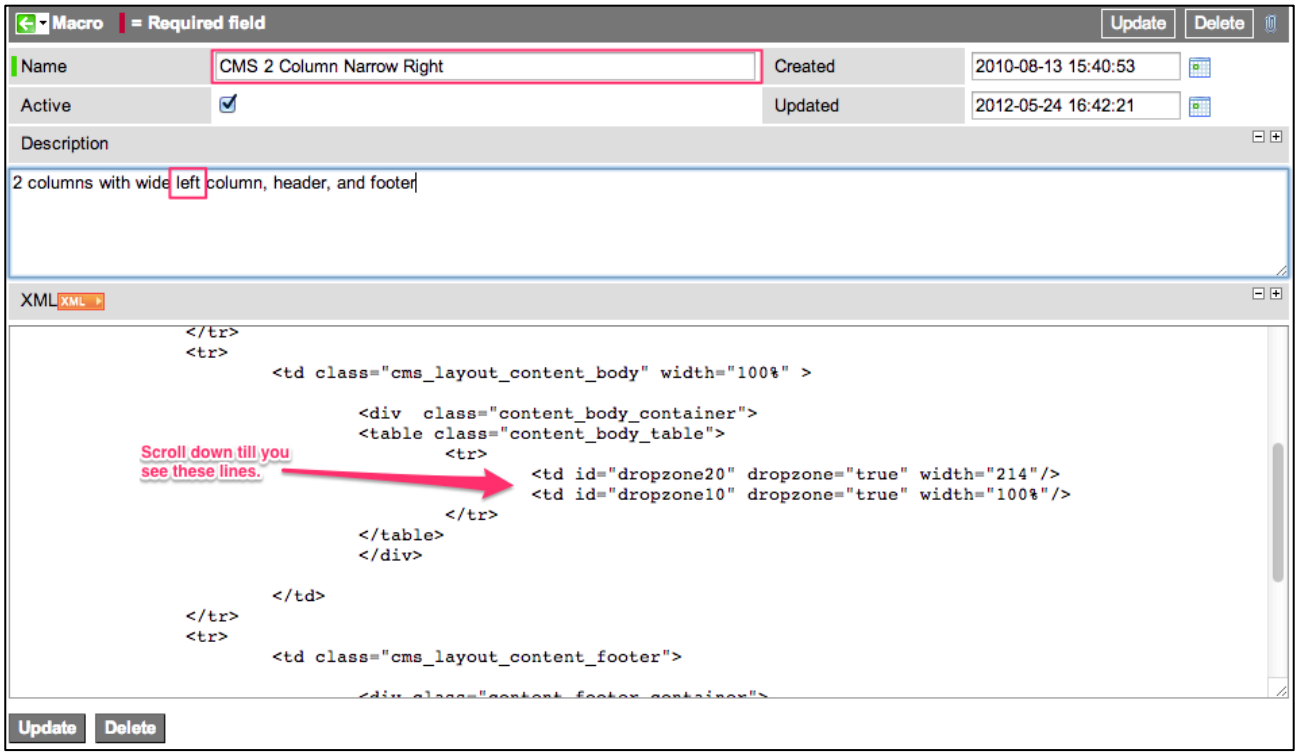


3. Press the **Layout** details icon on the right of the field to open the layout details.

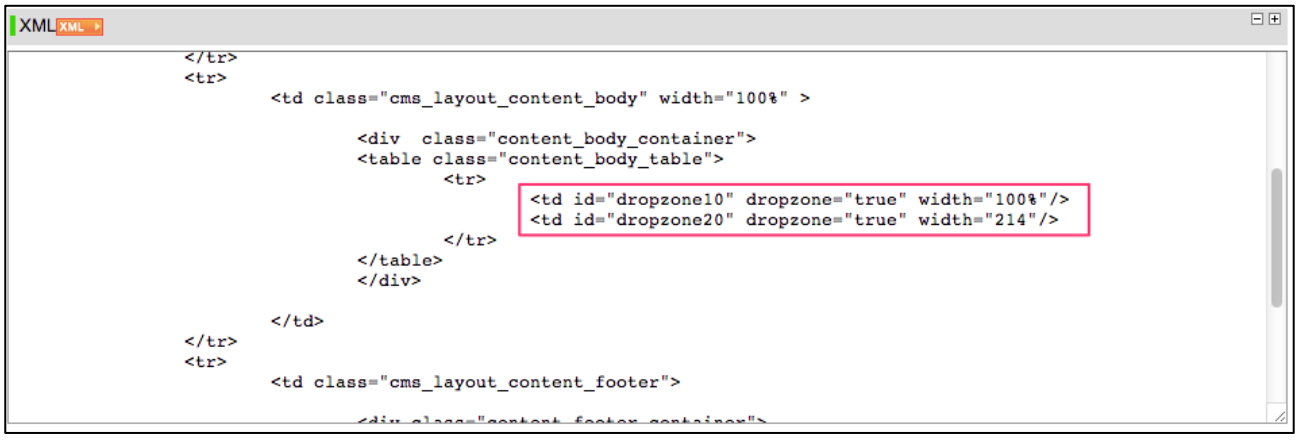


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4. Change **Name** and **Description** to indicate that the right is narrow and scroll down the XML text block to find the entries **<td id= dropzone20…** and **< td id= dropzone10…**.

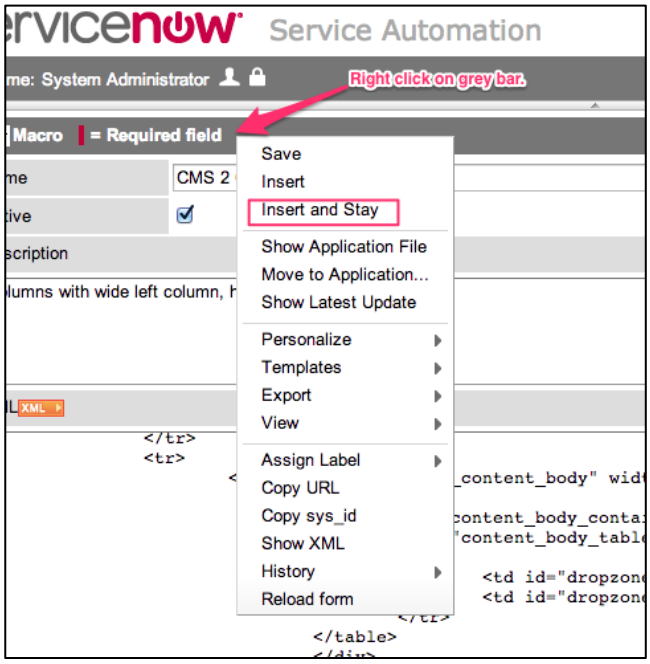


5. Swap these two lines.

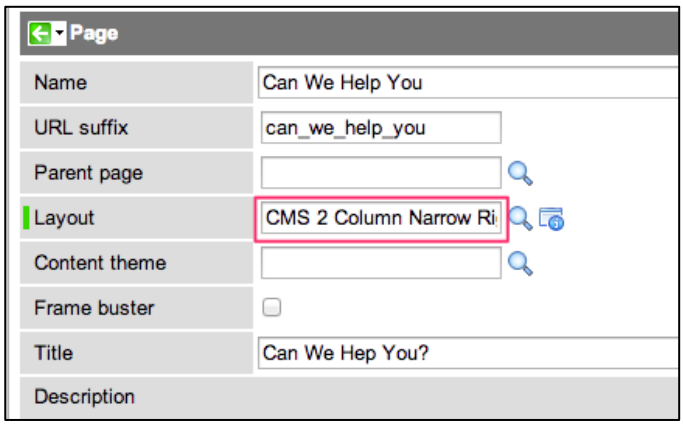


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6. Right-click on the Record's gray bar and select **Insert and Stay**. Click **Update**.

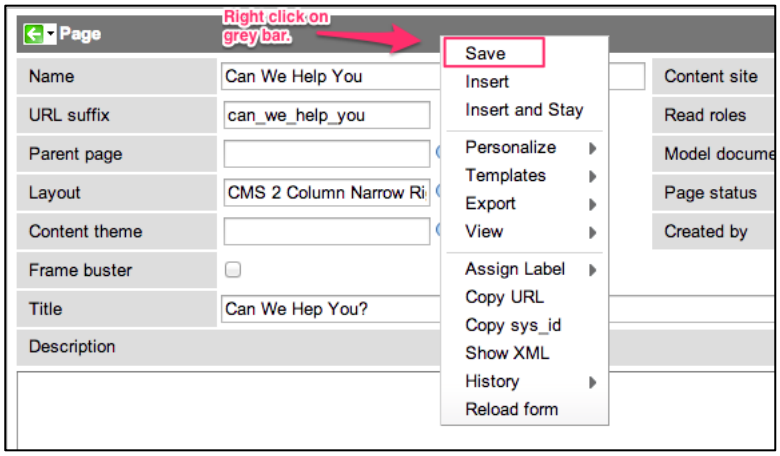


7. The Layout field contains the originally selected layout. Click the magnifier to the left of the field, and change the selection to the newly created layout.



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8. Right-click on the Record gray bar and select **Save**. The Save operation ensures that the old layout does not display in the preview page.

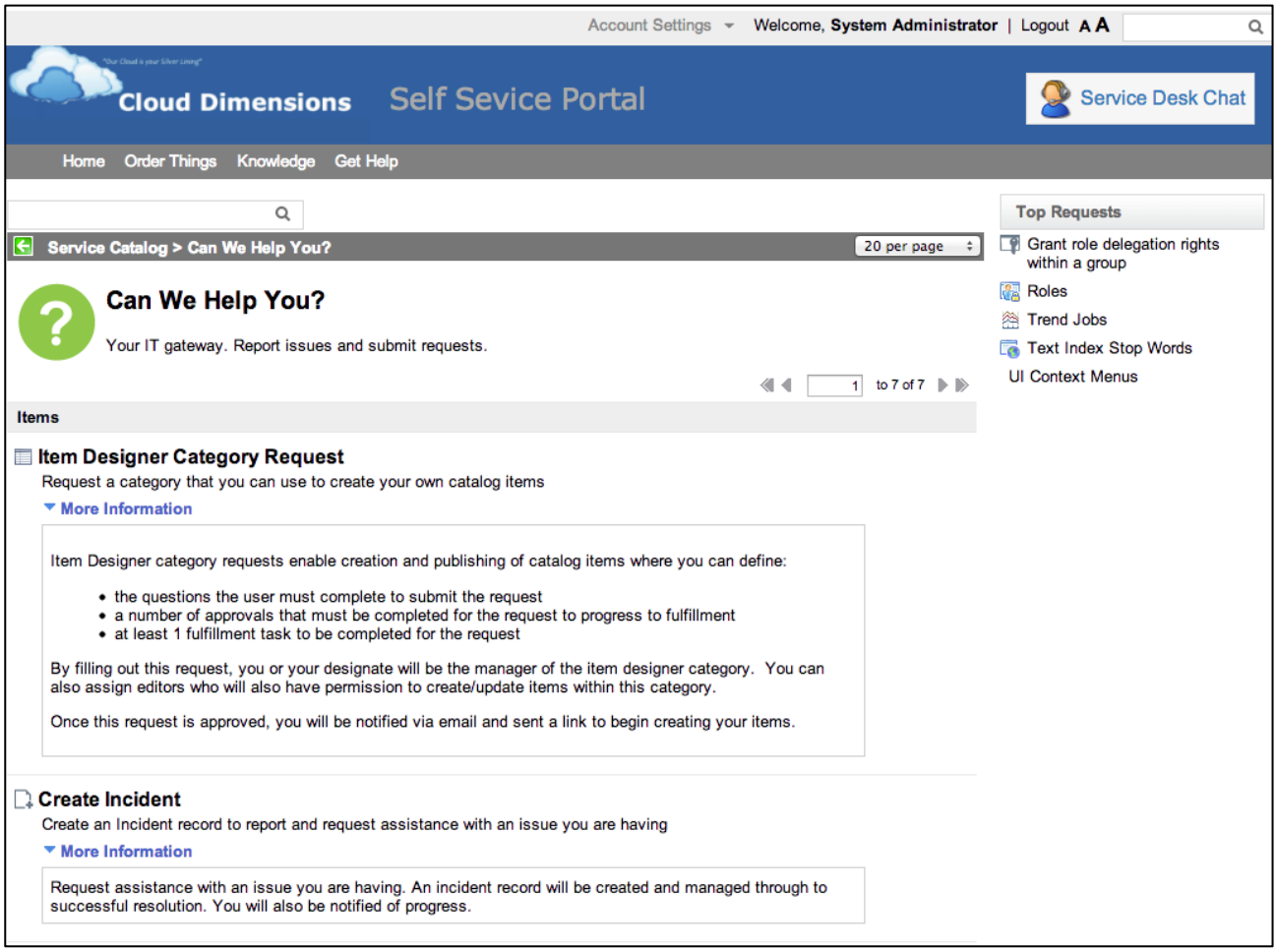


9. Preview the page with the new layout by clicking the **View Page** link.



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10. The page should look like the example below.



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